

## Daily and Weekly Planning to Reduce Squirrel Chasing

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From NJSBA PracticeHQ

Legal professionals get an external interruption every 3-4 minutes from email, instant messages, telephone calls, social media, etc. That's bad, but there is something even worse that torpedoed our day ... Internal interruptions! What do we do to sabotage our own day? According to some studies, we switch tasks on our computer nearly 600 times a day. We take 70-100 email curiosity breaks per day. The reality is that we sabotage our own day chasing squirrels more often than we care to admit!

Attention Management (or Distraction Management) is an essential skill to learn in today's age of information overload. There are many techniques that we can employ to assist us with this problem, but one that we too often overlook is good old-fashioned Daily Planning and Weekly Planning. It is routine that many people lost when the shiny, sparkly technology was put in front of our faces!

Daily and weekly planning are critical if you want to change your life and change your habits. If your current routine doesn't include planning, that routine must be broken and reconstructed! The reality is that very few people take the needed 5-10 minutes at beginning of the day or the end of the previous day that will save them hours, days, weeks, months & years of waste and inefficiency. Most people just "show up" to work and "dive-in." We jump right into email where we become instantly derailed by fighting little fires instead of first defining clear goals or a roadmap for the day. We need to sketch out a daily plan, huddle with our team, adjust our daily plan if needed, and then use that daily plan as our roadmap that will keep us focused. When you have no roadmap, it is incredibly easy to allow distractions to control you.

I have observed many people experience enormous success and focus by taking just 5 minutes to plan each day. Many prefer planning tomorrow's roadmap at the end of the previous day. We tend to know where we left off with tasks because it is fresh in our minds. Others have experienced success engaging in daily planning the morning before the day starts because we are rested and have a clear mind. If you engage in morning planning, I recommend coming in early, before all the fires start. It is difficult to focus once the chaos begins, especially if you don't have a solid road map for the day.

### How to Create your Daily Plan:

As a 20+ year paperless lawyer & consultant, as much as I love technology, I am a huge fan of using some form of paper for planning. One great tool is a paper-based planning journal. Keep it open, next to your keyboard all day, so you can look at it when you have the urge to check email 75 times! Here is an example of my TDC (Tame the Digital Chaos) Daily Planning Journal:

Date: 12/4/2019

## PRIORITIES

- 1 Wash State Bar ODC
- 2 Ohio State Bar Webinar
- 3 OSBA Tech Conf. Prep
- 4
- 5

## GRATEFUL THOUGHTS ☺

1. Brother (even if a Trumper)
2. My health - lab results
3. Mom



## TODAY'S TIME BLOCKING



6:00 Email  
Walk dog

7:00 WSDA Project

8:00

9:00

10:00 OSBA Tech Conf Prep

11:00 Email Batch Process

12:00 Leave for OSBA | Lunch  
Bibibop  
Super Greens

1:00 OSBA Webinar

2:00

3:00 WSDA Project

4:00

5:00

6:00 Workout - Life Time + Cardio

## NOTES

X-Mas gifts  
Joe D. re landscape  
800-232-7124

Some people ask me why we should re-write this information on paper if it is already on the calendar in Outlook. There are multiple reasons:

- I want that roadmap for the day prominently in front of me so I can see it at all times. If it is out of sight, it is out of mind. That means for me that this list is near my keyboard. If the list is in Outlook, it is probably minimized most of the day.
- I don't want to waste a big computer monitor to display my roadmap. That is a waste of my monitors! I use my monitors for more useful functions like comparing documents or displaying reference/subject matter relevant to projects that I am working on.
- It is likely that events on my calendar were created weeks ago, so they are not freshly on my mind. It is helpful to re-write those events.
- It is helpful to time-block those events & tasks so you engage in realistic planning about how long it will take you that day.
- Taking 5 minutes to write that daily plan serves as a contract with yourself to get those things done that day.

Another tool that you could use is the simple index card. A pack of 100 index cards will cost you less than \$3.00. Use one card per day, writing 3-5 tasks that you want to accomplish that day. Another way of articulating this is, "Today is a success if I get these 3-5 tasks completed". It is okay to re-write items that

are on your calendar, and if you get those 3-5 things completed, then get another card out and write down 3 more tasks! Here is an example:

Tuesday Tasks	
1.	Enter yesterday's time that I forgot
2.	Review prebills
3.	VA project (2 hours)
4.	Call Sam
5.	Research Jones statute of limitations

## How to Do Weekly Planning

A once-a-week “get organized” deep dive is also essential to successful distraction and time management. This will help you frame realistic daily planning, review all tasks & deadlines on your plate, catch things that “slip between the cracks,” and keep you focused on the big picture goals that you want to achieve. It will help you stay driven and will give you the power of creativity and a sense of control in your day and in your life. Without engaging in this weekly habit, you are just shifting piles of dirt from day today. Do you want to move a mountain in your lifetime or just shift around piles of dirt? Here’s how:

1. **Do your weekly deep dive planning session on the same day and time each week.** That’s right, ... same time, place and channel! Plan 60 minutes for this session, one day a week. Performing this one-hour ritual on the same day and time each week will make it infinitely easier to develop a habit of engaging in this important planning. Moreover, it is proof to your team (and yourself) about how important and sacred this practice is to your organization.
2. **Think about using the “buddy system.”** Learning new healthy time management habits is very much like learning new dietary habits! Team up with a colleague and do your own weekly deep-dive planning sessions at the same as each other. Let me be clear. You are not talking to each other or planning with each other. It is admittedly a little awkward, but just get on the phone or a web meeting and do your own planning in dead silence. In fact, commit not to disturb each other.
3. **The Weekly Deep Dive Checklist**

At each weekly planning session, these are all the planning tasks that you will perform:

- ✓ **Review Calendar Two-Weeks Forward.** Open up your calendar and touch every single appointment on your calendar. Stop – Pause – Think about what you have to do to prepare for this appointment. Can you move forward with it? Do you have to do any research? Do you need to time-block (make an appointment with yourself on your calendar) to prepare? If so, block out your preparation time. If you need to look out further than two-weeks (or less), adjust your look-forward time. For example, I look 2-weeks forward at every appointment, and then I look at 4 additional weeks to find appointments that require travel arrangements so I book travel arrangements (flights, hotel rental car) in time.

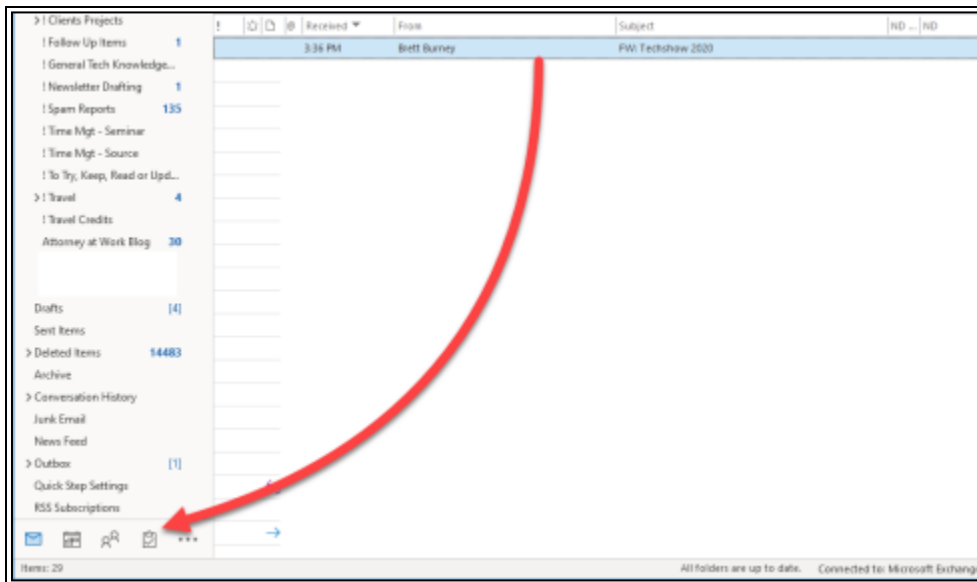
- ✓ **Review Calendar Two-Weeks Back.** Open up your calendar and touch every single appointment on your calendar, going two weeks back. Stop – Pause – Think about whether you did everything that you promised people in those appointments. If not, schedule time to do those things and update your task list.
  
- ✓ **Review your Case/Matter/Project List.** Whether you work with cases, matters, or projects (or all of the above), you better have a list of all your active cases, matters or projects! If you don't, you absolutely should. Learn how to run a report from your time, billing & accounting system. Review this list for the following:
  - Does your list have all new cases, matters, or projects that landed on your plate this week?
  - Can you remove any cases, matters, projects that closed this week?
  - Ask yourself with each item on that list, "Am I on-track or off-track?" If you are off-track, block off time on your calendar to do a deep dive into that case, matter or project! Do not do a deep dive into it now, or your weekly deep dive will take a half-day!
  
- ✓ **Review your Task List(s) and Follow-Up Email Folder.** Review each and every item on your task list(s). Stop – Pause – Really think about each item. Just like with the calendar above, you are not skimming. You are thinking about each item. Ask yourself:
  - Is the task complete? If so, mark it complete.
  - Is the task still relevant? If not, delete it.
  - Is the task overdue, urgent, or about to become urgent? If so, block off time on your calendar to get it done!
  - Do you need to provide a status update to anyone?
  - Do you need to follow-up with anyone in order for you to complete this task (are you waiting on someone else)?

Finally, and this is important, remember to check all of your task lists, including any "Some-day" or "Bucket" lists. We too often forget to check our strategic planning or quarterly or long-term lists and then these items never get done! It is vital that we have a routine/system in place that makes us review all items on all task lists.

- ✓ **Batch Process Email (Delete, Delegate & Delay).** Process your inbox to **Delete** any emails that you can. Also, **Delegate** any emails that you need to delegate. Finally, if you need to **Delay** acting on an email, be sure to record it on your task list, create an appointment with yourself to do it (time block), and then save the email into the case/matter/project folder so you can delete it from your inbox. Remember, your inbox is a terrible task list. Stop using your inbox as a task list!

**Note:** If you are familiar with batch processing emails, you will note that I removed the **Do** from batch processing during the weekly deep dive (you typically Delete, Do, Delete & Delay). This is intentional. If you do the "Do" during the weekly deep-dive, it will not take you 60 minutes to complete. It will take you half a day. For the weekly deep dive, focus on the Delete, Delegate & Delay.

If you use Outlook, you can easily convert emails to tasks by dragging and dropping an email on to the Task icon in Outlook, or use Quick Steps.



This function acts as a “copy” and will create a task, while still leaving the email in your Inbox for you to take further action like creating a calendar event or filing it away. You can convert that same email to an appointment by dragging it on to your Calendar icon.

- ✓ **Clean your Desk, Piles, Stickies, and Notes.** During the week as life happens, it would be ideal to enter all tasks and do all your time blocking on your calendar immediately when the task surfaces. We all know that this doesn't happen perfectly that way. You may be running out the door when the phone rings and someone asks you to do something. So you jot it down on a sticky note and slap it on your keyboard. Likewise, maybe someone sent you a pile of paper and that is sitting on your desk as a reminder to do it. All these things are really tasks and appointments that should be entered and then you should scan and save those papers or notes or throw away the sticky notes. The end result is that (1) you have a single place where you need to look & manage your tasks (not 10 or 20 notes, stickies, etc.), and (2) you have a clean desk, which will help you concentrate.
- ✓ **Weekly Time Report.** Review your billable timesheets for the week. Learn how to run a report from your time billing & accounting system (or have someone run it for you). For this information, again, stop, pause and think about each time entry and ask yourself:
  - Did I do everything that I promised relating to the activity that I performed for this time entry? If not, update your task list and/or schedule time on your calendar to do it.
  - Are there any follow-up items that I should pursue relating to this time entry?

By performing this weekly ritual, you kill three birds with one stone:

1. You proof your time entries for grammar and accuracy, preventing you from having to do a massive review once a month.
2. You remember tasks that you need to perform that you failed to do.
3. You will also stumble across time entries that you forgot to enter, thereby billing more time, and who doesn't want that!?

In conclusion, while no system is perfect, this weekly deep dive, following the above checklist each week, will definitely help you get massively prepared for the week, as well as help you find "things that slip between the cracks" because we always have more on our plates than we can eat!