

Lisa Montanaro
LM Organizing Solutions, LLC®
www.LMOrganizingSolutions.com
(845) 988-0183

**“Take Control of Your Work Day: Get Organized and Get Things Done”
NALP 2012 Annual Education Conference
April 20, 2012**

Introduction

Organizing Principles

- I. How Disorganized Are We? The Sobering Statistics...
- II. The Benefits of Being Organized
- III. What is Clutter?
- IV. Self-Assessment – Decide to DECIDE®: Are You Ready to Make the Necessary Changes?
- V. DECIDE to be Organized®
- VI. Organizing at the Office
 - A. Response to mail: RAFTS
 - B. Filing Systems/Paper Management
- VII. E-Mail Management
- VIII. Time Management
 - A. Self-Assessment
 - B. How to Organize Time
 - C. Calendars/To-Do Lists/Project Lists
 - D. Adding a Time Element to Tasks
 - E. Study your Energy Levels
 - F. Procrastination
 - G. Shorten Your Work Day—Reverse Psychology
 - H. The Myth of Multi-Tasking
 - I. Interruptions
 - J. More Tasks Than Time?

Questions and Answers

Introduction

- Lawyers need to deal with tons of paper, serious demands on their time, and high expectations of productivity.
- Lawyers often work in an interruption-rich, crisis driven environment. This constant state of distraction causes lawyers to multi-task, which commonly results in stress and overload.
- Excellent time management, project management, and organizing skills will help any busy professional. These skills help lawyers take control of legal work, learn to juggle projects effectively, and decrease stress.

How Disorganized Are We? The Sobering Statistics

- Many people think of lawyers as ultra-organized individuals. However, with such a large cross-section of the population due to the sheer number of lawyers in the U.S., it is hard to over-generalize the profession as “organized” or “disorganized.” Thus, let’s look at the average individual in terms of organization challenges and habits.
 - OnlineOrganizing.com reports that the average American loses an hour per day due to disorganization.
 - Dr. Richard Swenson in *Margin* reports that the average American will spend one year of his or her life searching through desk clutter looking for misplaced objects.
 - During the last 25 years, our leisure time has declined by 37% while our workweek has increased by a full day.
 - The *Wall Street Journal* reports that the average executive loses six weeks per year searching for missing information in messy desks and files. That translates into one hour per day per person.
 - *USA Today* reports that Americans collectively waste 9 million hours every day looking for misplaced items.
 - We only retrieve 20% of what we file; that means that 80% of what we take time to file is never looked at again until we throw it out. This is often called the Pareto Principle, named after Sr. Pareto, a 19th century economist from Italy.
 - Spending 15 minutes every morning mapping out your day can save up to 6 hours per week.

The Benefits of Being Organized

- Being organized positively affects your time, money, health, space, reputation, and relationships.
- Getting organized is about *decluttering* your life, clearing out the deadweight in places from your closets, desk top, to your calendar and computer, and then implementing systems that keep the good and useful stuff only in its place.
- Being organized has less to do with the way an environment looks than how effectively it functions. The goal is not to BE organized, but for your life, home and office to run more smoothly.
- Organizing is a skill, but unfortunately, it is not taught in schools.
- For lawyers, being organized is vital. It can make or break a major case, cause a lawyer to miss the statute of limitations for bringing suit in a timely manner, send the wrong message to a partner or a client that views the lawyer as disorganized, etc.

- Thus, being organized as a lawyer, or any other type of professional, is vital to one's career and reputation.

Got Clutter?

"The ability to simplify means to eliminate the unnecessary so that the necessary may speak." ~

Hans Hofman

- Why do people get disorganized?
 - Technicalities
 - Items not having a home, inconvenient or not enough storage space.
 - Realities
 - Unrealistic workload for busy professionals caused by under-staffing and downsizing, speed of life and technology, being in transition (e.g., moving, getting married, starting school, having a baby, searching for a new job, etc.), uncooperative partners at home or at the office.
 - Psychological issues
 - The need for abundance, craving the rush of chaos, unclear goals and priorities, fear of success or fear of failure, fear of losing creativity, need for distraction, disliking the physical space, sentimental attachment to physical possessions, the need for perfection, delayed decisions.

Self-Assessment

- There are an ever-increasing number of products and services designed to help a person get organized. First, however, you must determine the areas in which you want to improve – your organizing goals. These might be filing, clutter control, time management, maximization of storage space, juggling projects and priorities.
- Remember that change is a process, not an event. Don't try to change everything at once. Pick one area of your life that needs changing most and focus on it first. And when you create a new organizational system, like a file drawer, keep it simple. If it's too complicated, you won't stick to it.
- Organizing Assessment Questions
 - What is your purpose or desire for wanting to get better organized?
 - What is your dominant brain type, learning style and organizing style?
 - What are your strengths and weaknesses?
 - What is working or not working?
 - Why did things get this way?
 - How can they be fixed?
 - What is your disorganization preventing you from having in your life or work?

Learning Styles

Can you learn to be better organized? Yes! Organizing is a skill that can be learned, but it is not taught in school.

- Visual people learn best by seeing.
- Auditory people learn best by hearing.
- Kinesthetic people learn best by doing.
- Tactile people learn best by touching.

Brain Types

- Left Brain Dominant Personality
 - People who are left-brain dominant tend to be tidy, methodical, punctual, think in linear fashion, crave order, are good with numbers, and need closure.
 - Many lawyers are left brain dominant, which is one of the reasons why the general population tends to perceive lawyers are being “organized.”
 - Thought sequence: Analysis » Action » Feeling
- Right Brain Dominant Personality
 - People who are right brain dominant are characteristically creative, use associative thinking, and think in metaphors and pictures.
 - Thought sequence: Feeling » Action » Analysis

Decide to DECIDE™: Are You Ready to Make the Necessary Changes?

- The single most significant characteristic that separates organized people from disorganized people is decisiveness.
- A Meta Decision is a decision made with the intention of impacting or replacing a number of future decisions. Meta decisions are crucial to organizing because they save the mental anguish and time involved with making hundreds of individual decisions one by one.
- *“Perfection is achieved, not when there is nothing more to add, but when there is nothing left to take away.” ~ Antoine de Saint-Exupery*

DECIDE™ to be Organized

“There is no more miserable human being than one in whom nothing is habitual than indecision.”
~ Psychologist William James

D = Discover what you have and want at home, at work, and in life

E = Eliminate what is unnecessary and does not further your goals

C = Categorize what remains

I = Implement a system designed to match your needs, habits, work and lifestyle

D = Dedicate yourself to maintaining your effective new system and integrating it into your life

E = Enjoy the freedom and positive results that being organized brings

Organizing at the Office

There is no “right” way to organize a workspace. The first step is deciding what you need with regard to furniture and equipment. Top mistakes people make in office (90% of workers):

- Accepting predecessor’s office set up/configuration.
 - Many new attorneys get to their firms or in-house jobs, are told where their office and desk is, and just sit down and start working without giving any thought to whether the set-up and configuration makes sense for their work and organizing style.
 - Speak up if you need to customize your workspace to match your organizing and work habits.
- Placing file cabinets too far from desk/work area.
 - Keep files within arm’s reach; set up so can work out of files all day, retrieving and putting back with little effort. If you have to get up to file a piece of paper, it will probably just end up in a pile on your desk.
 - If space allows, go vertical (replace a 2 drawer with a 5 drawer model)

- Vertical extend farther into room, but provide easier retrieval
- Lateral are good if you need more surface space for printer, fax, copier, but change the rails so can file front to back instead of side to side (easier to retrieve and increases capacity).
- If share files with an assistant, place filing cabinet near doorway.
- Many law firms and in-house positions have “file rooms” where the client files are stored. While these file rooms may be organized, they make it difficult for attorneys to use files on a daily basis.
- Move files that you are actively working on in your office, and organize them in a way that makes sense to you.
- The shared files should have a “check out” card feature so that other lawyers and staff in the firm or in-house company can clearly and easily see who has checked out the file. This will allow the shared system to be used effectively.

Response to Mail

- The legal profession generates a lot of paper, probably even more than the average profession does. You must create a system for processing all of that paperwork that comes across your desk at work, and to your home.
 - RAFTS Method
 - **R**ecycle
 - **A**ct
 - **F**ile
 - **T**oss
 - **S**hred

Filing Systems/Paper Management

- Creating the Filing System
 - Unless your filing system is 75% effective, start from scratch. Gather banker’s boxes, hanging file holders and inside manila folders, and a label maker (or labels done on the computer or handwritten).
 - File by category, and then alphabetically within category (e.g., marketing, administrative, clients, professional association, etc.).
 - Keep titles simple and categories broad; you can break down into sub-categories if necessary.
 - Think retrieval, not storage - name based on where you’d “look” for file.
 - Break down files that have become too full - consolidate ones that are sparse if related category.
 - Use standard green hanging file holders – consider box bottom style for bulkier files, and ones with pocket inside for smaller items
 - Consider a color coded system – colored folders with white labels or manila folders with colored labels
 - Product Recommendation: Viewables by Smead – can see from the top and side; good for lateral style drawers to avoid bending down to see file names
 - Use straight line filing within category – do not alternate tab position
 - Easier on the eye
 - Does not break the pattern if add or remove file to the system after create

- Easier to figure out which category belongs to based on tab position
 - Use tab coding – alternate tab position to indicate category shift
- Assign Files a Home
 - If have space, assign a category of files to each drawer
 - If not, combine 2-3 small categories to a drawer that make sense together
 - File drawers part of desk - use for confidential, daily or personal
 - If no drawers for filing, use file boxes/crates, accordion style holders, wall mounted pockets, or a rolling file bin that can slide under desk if only have a workstation type surface with nothing under it.
- Maintaining the system
 - Create a file index to avoid duplicates and be able to recall the system without having to physically sift through files.
 - Match the names of hard copy files to the ones you create on the computer so that you do not have two sets of files with different names for the same matter. Try to do the same for file categories (e.g., clients as a folder in the computer and then files within it by name; do the same in your hard copy files).
 - Clean out files at end of every project and when archiving files.
 - Equalize at end of each workday.
 - Create new files for papers that come on desk and do not have a home yet but are important enough to keep and create new files for (upper right hand corner trick).
 - Learn to delegate more effectively. Many people have assistants at work but don't fully utilize them. When you have a synchronized filing system, your assistant and staff can not only find things without having to ask you, they can also help you manage your paper.
- What to keep and file
 - As lawyers, you probably will have to retain more paper for longer periods of time than the average professional due to the legal nature of the documents you handle.
 - Use statutes of limitation as built-in guidelines for record retention.
 - If in-house, check with accounting and legal departments for Record Retention Policy; if must be kept for tax or legal reasons, store separately or with those departments.
 - Identify files that can be stored in an off-site location, shredded or recycled, given to a different department or division, or scanned into the computer. Remember, 80% of what is filed is never retrieved again.
 - Become friends with a scanner – it is a wonderful tool and will save a lot of physical space in the office and enable you to save things easily and categorize them.
 - Unused files can be boxed up and archived with a deadline of 3 or 6 months to pull out and review; if still not vital, purge!
 - Think about the cost of cabinets, price per square foot of space taken up; the expense of hoarding paper!

Paper Value System

WASTE (Eileen Roth, *Organizing for Dummies*)

- Is it **W**orthwhile?
- Will I use it **A**gain?
- Can I easily find it **S**omewhere else?

- Will anything happen if I Toss it?
- Do I need the Entire item?

Common Pitfalls

- Trying to read everything!
 - Many lawyers feel that they should stay on top of all reading, whether it is for work, current events, the ABA Journal, etc. Try to stay focused on identifying general content and filing by subject matter.
 - Makes friends with a scanner and create an electronic subject matter filing system.
 - Create a separate “reading” file to carry with you to read when you are waiting to meet with people, waiting to be called in court, riding the subway, at the doctor’s office, etc.
- Dealing with “maybes.”
 - Become familiar with your law firm or company’s Record Retention Policy so that you have an external guide to deciding what to keep and for how long.
 - For personal paper, don’t fret over whether to keep or purge. Make a decision. You can always purge later if keep, or find in another form if purge.

E-Mail Management

- According to *The Wall Street Journal*, the average U.S. worker spends up to four hours a day sending and receiving e-mail, creating a time management nightmare for executives and employees. Of that four hours, it is estimated that one hour each day is spent on the 36 percent of e-mail messages that are either irrelevant, or relevant but do not require a response.
- Lawyers generate a ton of email. Email is a great way for attorneys to communicate quickly and efficiently. However, email can also cause a time management problem, become clutter, and make a lawyer less productive.
- Try to maintain less than one page of inbox messages. How? Take action on email:
 - Respond immediately;
 - File for future retrieval;
 - Schedule a meeting, task or activity;
 - Capture contact information;
 - Delegate an activity; or
 - Delete.
- If you frequently send the same types of emails, create templates that you can use over and over (changing only the specifics each time).
- Turn off e-mail alarms and prompts through your e-mail preferences tool.
- Plan for the reading and response of e-mail in your daily schedule.
- Estimate the amount of time you are spending on e-mail now, and cut that time in half. Then schedule e-mail sessions each day and stick to the time constraint. Deadlines make a person more efficient without losing effectiveness. Therefore, place a deadline on the time you spend reviewing your e-mail. You may want to spend half the allocated time in the morning and the other half after lunch or before you finish working for the day.
- Create and use folders to manage your e-mail receipts. Build a personal folder directory that mirrors your paper filing system to reinforce storage and retrieval of important information. In addition to this folder system, build an inbox structure that reflects your active projects and

change your e-mail settings to direct e-mail that contains project-related language to those folders within your inbox.

- If an action is required in the near future, move the e-mail from your inbox to storage folders kept within your e-mail system. Many law firms and companies impose limits on inbox size, but not in a personal folder.
- For e-mails that need to be kept for a longer period of time, create an electronic filing cabinet, with electronic folders for category names that match the physical files. Use Word or any system your company utilizes and backs up often.
- Delete the earlier string of emails and just keep the most current one to avoid saving redundant emails.
- If e-mail has an attachment and that is all you need, only save the attachment.

Time Management

“Dost though love life, then do not squander time, for that’s the stuff life is made of.” ~ Benjamin Franklin.

- Chief among a host of reasons for the high dissatisfaction among lawyers is the pressure of high billable-hours requirements in large firms, which has made it extraordinarily difficult for many lawyers - particularly those with family-care responsibilities - to achieve anything approximating a balanced life. Some lawyers have found answers to the problem of poor quality of life, without having to give up law as a career altogether, while others have turned to less demanding, or alternative careers in order to find work-life balance.
- Consider what it means to sell your time - your life - in six-minute increments. As M. Cathleen Kaveny suggests in *Billable Hours in Ordinary Time: A Theological Critique of the Instrumentalization of Time in Professional Life*, Loyola University Chicago Law Journal, 33 (1), 173-220 (2001):
 - Your time becomes a commodity - each hour of your life can be assigned a price.
 - The only "valuable" time is billable time - the hours of your life have instrumental, but no intrinsic, value.
 - It presumes that all time is fungible - every hour of your life is potentially available for work.
 - Non-billable time has no intrinsic value - the decision to spend time doing anything other than billable work must be justified; time that does not produce revenue is simply wasted time.
- Many lawyers wish for greater balance in their lives, but most feel too busy to take the time to make real changes. Balance won't just happen - you have to consciously and deliberately work toward it by examining your life, work, and time, and determining what is working and not working for you.
- Life/work balance isn't a goal; it's a process. More importantly, it won't happen overnight. Trying to change everything immediately just gives you one more urgent thing to do. Take one small step at a time. Most importantly, keep in mind that balance isn't something you just do. It requires constant readjustment.
- Visit my blog at www.DecideToBeOrganized.com and read the post, *“Time: The Great Equalizer”* for my take on time management as an oxymoron.
- *“The significant problems we face cannot be solved at the same level of thinking we were at when we created them.” ~ Albert Einstein*
- Self Assessment

- Preparing and planning for the future is the most critical step to time management. By being proactive, you'll spend less time in reactive mode.
- The best way to assess your time management skills is to focus on what you are doing presently in an honest manner. Each person's specific time management issues are unique.
 - I spend way too much time on _____?
 - I am never late for _____?
 - My goals are clear when it comes to _____?
 - Meeting deadlines is easiest for me when _____?
 - The things that I easily delegate are _____?
 - I spend way too much time on _____?
 - I wish I had more time for _____?
 - I procrastinate whenever I have to _____?
 - One thing I wish I could do every day is _____?
 - It is hard for me to say no to _____?
- Time Map
 - A Time Map is a snapshot of a typical week in your life, both professionally and personally. Try to pick an average week, not one when you are on vacation, or in the middle of a huge trial (unless huge trials are the status quo for your work).
- What makes time so hard to manage?
 - Opportunity overload
 - Interruptions
 - Spend a lot of time "thinking" about time, but not planning or managing it
 - Hyper speed/pace of life
 - E-mail/computers/internet/social media – time sappers!
- Time Management Tools
 - Keep one calendar, PDA, or planner to have a place to write all appointments.
 - Create a master to-do list and a separate daily to-do list.
 - Your Master To Do List can also be called a Project List. It can be broken down by category (litigation, legal opinions, research, recruitment committee, etc.), by deadline, or some other type of system that makes sense for you and your work.
 - Add a time element to your task list. Plug your to-do's directly into your calendar so that they are scheduled and get the time and attention they need.
- Study your energy levels
 - Are you a morning person? If so, schedule your most vital work assignments for the morning, if possible.
 - Use your peak energy times for the most critical tasks. Make this your "quiet time" when you set up a Do Not Disturb environment to focus on the big elephant that needs your attention!
 - Some Days are Better Than Others
 - Statistics show that Fridays are the least productive in an office environment as people's minds are already out the door by week's end.
 - Tuesday is the most productive, followed by Wednesday, Thursday and Monday.
 - Monday suffers from an overload of weekend mail and calls from clients and customers, as well as reentry shock.

- Procrastination - How to Overcome?
 - Involve Other People
 - Collaborate with other lawyers. Split up a huge brief by writing a portion of it and having someone else write another portion, delegate research, meet for a brainstorming session, etc.
 - Jump Right In
 - Just start the work assignment and see where it takes you.
 - Take it Step by Step
 - Break the assignment up into small, manageable steps.
 - Choose your Starting Point
 - Who says you have to start at the beginning? Many lawyers get stuck on their opening statement for trial, or their first paragraph in a brief. Start somewhere else and then come back to the part that has you stuck.
 - Race the Clock
 - Set a self-opposed deadline, and milestones to meet along the way. Come up with your own behavior modification system where you design the incentive.
 - Tie Yourself Down
 - Don't allow yourself to do something else until you get this project done, or at least meet a designated milestone.
- Shorten Your Work Day - Reverse Psychology
 - Studies show that some lawyers and other busy professionals that are forced to leave work earlier are actually more productive throughout the day.
 - According to a recent study in the Journal of Applied Psychology, you may get more done--and enjoy your job more--if you pack up and go home on time.
 - People who give themselves a chance to recover from the stress of the day and begin the next morning well rested are more energetic, enthusiastic and effective than those who stay late.
- The Myth of Multi-Tasking
 - When we need to accomplish more, we do 2-3 things at once. But in reality, multi-tasking is generally less efficient than focusing on one thing at a time.
 - Studies show it impairs productivity – impossible to do 2 tasks at the same time without compromising each. Takes your brain 4 times longer to process than if you focused on each task separately.
 - David Meyer, Ph.D., a psychology professor at the University of Michigan in Ann Arbor explains “It takes time to warm up to a new task, especially if both require the same skills.”
 - For example:
 - Writing an e-mail and chatting on the phone
 - It's impossible to do both of these tasks well because each requires language skills and short-term memory.
 - Reading the mail and talking to someone
 - If you're trying to actually read the mail, a conversation becomes difficult because you're tackling two language activities at once: reading and listening.
 - Making a shopping list during a business meeting

- Not a good idea if you need to pay attention. Writing a list is essentially talking to yourself, which makes it harder to hear someone else.
 - Some people thrive on multi-tasking – if getting it done, fine; but if too many balls in the air, re-think your strategy.
 - Check out my blog post: “*Multi-Tasking Decreases Productivity: Fact or Myth?*” at www.DecideToBeOrganized.com.
- Own Your Interruptions
 - The average American is interrupted 73 times per day.
 - Grade your interruptions.
 - Screen calls, or set up “call” times of the day.
 - Utilize a “do not disturb” sign or set “office hours.”
 - Anticipate urgency, which is the norm in legal practice.
 - Defer your response.
 - X Marks the Spot.
 - Before take an interruption, write down the very next action you were planning to take, how long you thought it would take, and whether you can delegate it to someone else. This one technique can help you not have to backtrack – can save up to 1 hour per day!
 - Check out my blog post “*Want to Avoid Getting Sidetracked? Own Your Interruptions*” at www.DecideToBeOrganized.com.
- More Tasks than Time? Follow the 4 D’s of Time Management (Julie Morgenstern, *Time Management From the Inside Out*)
 - Delete Tasks
 - Delay Tasks
 - Delegate Tasks
 - Diminish Tasks

About the Presenter

Lisa Montanaro

*Productivity Consultant ~ Success Coach
Business Strategist ~ Speaker ~ Author*

Drawing upon her experience as a performer, educator, mediator, and lawyer, Lisa founded LM Organizing Solutions, LLC® in 2002 and has helped thousands of people live successful and passionate lives, and operate productive and profitable businesses.

Lisa is a Golden Circle member of the National Association of Professional Organizers (NAPO), and an inaugural Certified Professional Organizer (CPO®). Lisa empowers people and organizations to “DECIDE to be Organized®,” a unique 6-step organizing process created by Lisa based on her many years of experience organizing and coaching clients. Through the implementation of the DECIDE® approach, clients create systems designed to achieve results at home, in business, and in life. Considered by her clients to be an “intellectual organizer and problem-solver,” Lisa is skillful at asking questions in a non-judgmental manner that help people and organizations find the answers to create a system tailored to their individual needs.

In addition to her hands-on work with clients, Lisa is a skilled motivational speaker. Lisa is a member of the National Speakers Association (NSA), the premiere organization for professional speakers. Her presentations at national conferences, local forums, and in numerous workplace settings are informative, interactive, and entertaining. Lisa has been interviewed by television and radio hosts, and is a frequent guest expert for national teleclasses and webinars. Indeed, Lisa was ranked the number 1 speaker of the 2008 NAPO Conference by attendees, sharing the spotlight with such notable speakers as Peter Walsh of TLC's *Clean Sweep* and the *Oprah Winfrey Show*.

A sought-after business expert due to her background as an attorney, mediator, and trainer of entrepreneurs, Lisa offers business coaching and consulting services to entrepreneurs and small business owners. Serving as a business strategist, Lisa assists clients in making informed business decisions designed to grow and protect their business. Offering an opportunity to brainstorm and problem-solve, Lisa assists with pivotal business issues, such as proposal or agreement writing, service packaging, marketing and branding, business processes and systems, and assisting with choice of professional advisors.

Lisa is a columnist for the Poughkeepsie Journal and Hudson Valley Insider, and the author of *The Ultimate Life Organizer: An Interactive Guide to a Simpler, Less Stressful & More Organized Life*, published by Peter Pauper Press in 2011. Lisa publishes two free monthly e-zines, "DECIDE to be Organized®," which offers free tips, articles, and advice on how to be more productive, and "Next Level Business Success," which offers business advice to entrepreneurs. Lisa also publishes the DECIDE to be Organized® blog, and is an active participant in social media. In addition, Lisa offers teleclasses, webinars, audio programs, group coaching programs, e-books, and tips booklets on her website.



LM Organizing Solutions, LLC®
P.O. Box 113
Warwick, New York, 10990
(845) 988-0183
www.LMOrganizingSolutions.com (website)
www.DecideToBeOrganized.com (blog)
www.TheUltimateLifeOrganizer.com (book)
@LisaMontanaro (Twitter)
www.Facebook.com/LMOrganizingSolutions (Facebook)
Lisa@LMOrganizingSolutions.com (email)