



White Paper:

According To Three Experts, How Can The Legal Industry Improve Efficiency?

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Within the legal industry, there have been many debates concerning the ways in which lawyers, paralegals and attorneys can develop a more efficient working progress.

With copious amounts of paperwork required on a day to day basis, and the importance of meeting client expectations; we asked three legal experts to share their opinions on productive time management, as well as the barriers which are currently preventing the industry from becoming more efficient.

They also offered up their best tips on how to overcome these issues in the future.

The Experts

Peggy E Gruenke (@PeggyGruenke)

Peggy is the Director of Practice Operations at Curo Legal. She is also the owner of [LegalBizSuccess](#). She has over 30 years of experience as an entrepreneur and has combined her experiences to bring a competitive advantage to law firms when building their business. She has been a speaker at the ABA Legal TechShow and is a Certified Clio Consultant.

David Bilinsky (@David_Bilinsky)

David is a Practice Management Consultant and lawyer with the Law Society of British Columbia, as well as a Fellow of the College of Law practice Management. In addition to this, he was previously the Editor-in-Chief of ABA's Law Practice Magazine. He works to empower lawyers in innovative ways to provide excellent service to clients. Visit his blog [Thoughtful Law](#).

John Miller (@JohnMillerCLT)

John heads up the [John Miller Law Firm, PLLC](#) where his team are strong believers that the legal business is a people business. Prior to setting up his own firm, John worked for Alston & Bird within the Corporate Transactions Group gaining significant experience dealing with mergers and acquisitions. As a result of his experience, he believes that advocacy and accessibility within the industry is vital.

1. How do you suggest those in the legal industry best manage their time?

PG:

With the number of distractions present in our daily lives — emails, social media, text messages, client calls, handling documents, and questions from staff — it's a wonder we get anything accomplished in a given day.

I think there has also been a shift away from the phrase "time management" to more of a focus on productivity, performance and success. I believe time is not something to be managed. There will never be enough time to do everything. There will always be more tasks added to the list. And as a lawyer, building a business, you hope that the tasks never run out because that would be a bad sign.

The focus should not be on managing your time, but managing your tasks and improving your ability to focus and take action. With this, the challenge then becomes managing tasks and identifying activities that have the highest value and continually asking yourself: "Is this task I am doing, at this moment, leading me towards my

goals and at the end of the day, adding value?" If the answer to this is "yes," then you are being more productive not because you managed your time better, but because you chose better and acted out of clarity.

DB:

I believe lawyers (and others) prioritize their tasks and use to-do lists that not only list the important and urgent things that must be done, but also have approximate time budgets attached. The reason is that when a window opens in their schedule, they can pick the most important task on their list that matches the time availability.

I also believe you should schedule the most important 2 items on your list and make appointments with yourself where interruptions are limited (family and file emergencies only) so that you can get that most luxurious item — uninterrupted time!

I also believe you should listen to Stephen Covey and set aside time each day to sharpen your personal saw. Take time to find out what is happening out in the wide world that has relevance to where you wish to go on a personal and strategic level.

I recently toured Google Inc. They have a policy that virtually everyone who is a knowledge worker is entitled to work up to 20% of the time on projects that drive them. University professors are entitled to sabbatical time. I think we need to introduce these concepts to the legal world so lawyers can work on projects that have a longer timeline than the current file on their desk and which feed them, emotionally, personally and strategically.

JM:

Time is exhaustible. It must be used or it is permanently depleted.

The key is to have a plan for using each day's time to achieve the priorities of your plan, respond to the inevitable outside influences that will force you off plan, and the wisdom to recognize when the interruptions are what you hope to achieve from your plan.

In our industry time is one of the base commodities that form the supply chain for our services. Any minute that is not used providing services to your clients, is a minute that will not be available in the future, so it is wise, I think, to always prioritize client work over administrative and business building activities.

2. What 3 tips would you give to those in the legal industry on managing personal productivity?

PG:

Start each week (a Sunday night task) with a master list of tasks broken down into sections. I even use a different highlighter color for each section. What kind of list system you use is a personal preference — just choose something that is convenient for you and you will use. I love technology and apps, but I still use my Moleskin for tracking tasks. I like the visual side of seeing my tasks, adding tasks during the day and marking a task complete.

Resist the temptation to do the "little stuff" first, trying to just get things off the list. Remember, the list never goes away so this method is somewhat self-defeating.

Take 1 minute — just 1 minute — at the end of each day to evaluate what you accomplished. This is somewhat therapeutic. It also becomes the start of your next day task list. Planning is an important key to productivity and your success. Creating the habit of preparing for tomorrow, today, is a great place to start.

DB:

Protect your time — and protect your time! Everyone will want you to do the tasks that they want you to do. If you don't seize control of your time and schedule, you abrogate this responsibility to others and you will be spending time on other people's priorities and not your own.

JM:

Use technology to maximize your time. Technology expands the productivity of each minute (e.g., through document and process automation), the length of time available for work, and where you can work.

Make a plan. Annual plans for business development, continuing education and continuous business improvement create defined objectives and accountability. The annual plan should contain defined actionable items that are executed on monthly, weekly or daily schedules.

Take personal time. It is impossible to be highly effective without building in opportunities for the things that recharge your mind and body.

3. What are the current stumbling blocks for the legal industry when it comes to being more efficient?

PG:

The focus on becoming more efficient involves an honest and unbiased inward look at and evaluation of current business processes. A task not all lawyers are equipped to do themselves and one that may be another stumbling block. In order to improve upon current processes with the goal of identifying areas to increase efficiency, they may have to make a financial investment in their business by hiring someone who does have this skill set.

The stumbling blocks are more like brick walls. But I am starting to see more cracks in the wall as the flow of information regarding the use of technology in law firms and the stories of successful implementations increases, while at the same time, the cost to implement technology decreases.

The introduction of cloud-based products for law firms has opened up a whole new set of doors for solos and small firms looking for affordable solutions to improve technology. So cost is no longer a stumbling block.

Maybe the main stumbling block for improving efficiency comes down to the failure to take action. Taking steps to improve efficiency is disruptive, costs money and takes time. No wonder there is resistance to improving efficiency in law firms.

DB:

I think Casey Flaherty, Gen. Counsel of Kia America said it best when he said: "Lawyers suck at using technology".

Tech has been responsible for transforming our economy. Lawyers are not immune to these changes. If we don't adopt technology and transform how we provide legal services and meet the growing need for access to

justice, we will wake up one day to find that someone/something else has met those needs and relegated lawyers to the side-lines. Either we embrace our future or we will find it written for us.

JM:

From a personal productivity stand point the issues that I experience are the growing number of tools to consider for productivity and automation.

As a solo practitioner I don't have the time to carefully consider all of the options and lack the technical knowledge to consider how choices of service will interact with each other (e.g., will my practice management suite play well with my accounting software).

4. How do you feel the industry can overcome these barriers?

PG:

I think it is not a matter of the industry overcoming these barriers but instead, seeing the change take place with entrepreneurial law students, lawyers and law firms. Change in small, consistent steps can be very powerful. Managing these steps is easier at a level where innovation and legal can play together.

I believe these barriers to efficiency (disruption, cost and time) are starting to crumble with the innovation that is happening on the edge of the legal industry. As products are created, as seen with the increase in legal service start-ups, and they are brought to the lawyers and law firms, you will start seeing a trend of faster adoption of this new legal technology. The adoption curve will accelerate because the younger lawyers who are joining the legal industry grew up with technology and are creative enough to see how using this technology can improve the delivery of legal services.

DB:

What struck me on touring Facebook and Google's campuses recently was the vast number of young, nimble minds that are working on creative things.

Law firms are mostly run by partners who are part of the 'grey hair crowd' and who do not have a great understanding of or appreciation for how technology is transforming our society. We need to get way more diverse in terms of bringing in and listening to creative minds on how we can rework how to deliver legal services in ways that meet the client's needs.

JM:

That's the beauty of the market. Someone will develop the right solution and find the way to deliver it at the right place, time and price point.

We believe that we have the right solution to considerably improve productivity within the legal industry, with customers stating that they have saved 71% on average with our Doxsera software. To find out how both TheFormTool PRO and Doxsera can help your legal business to thrive, visit www.theformtool.com.

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