

Time Management Guide – A Work Practice

Timeliness is the cornerstone of client service. Effective time managers are undisputedly more productive and more likely to meet a client's need for timely service. The *Time Management Guide* summarises the essential features of effective time planning, recording and billing.

This guide is intended to provide a broad overview to time management and the usefulness of the many of the tools will vary depending on the individual and the size of the organisation.

■ Essential Factors

In addressing “better time management” you may consider specifically allocating blocks of time

each day, depending on the nature of their environment, to

- plan for that day to determine what must be accomplished
- return phone calls and e-mails, particularly from clients
- address and deal with correspondence
- ensure timesheet information is recorded or assigned to specific clients or activities
- address urgent or priority matters

each day, week or month, depending on the nature of their environment, to

- plan for that week, month or longer period
- meet with clients
- work uninterrupted on specific client matters or activities including
- schedule out-of-office attendances and internal meetings
- attend to administration or business aspects of the organisation
- attend to accounting, book keeping and filings requirements,
- conduct periodic, usually monthly, reviews of all open client files

each month or year, to

- attend continuing education relating to professional development.

■ Effective Use of Time

You should develop skills and adopt policies and procedures to enable them to make efficient use of the time allocated to their general work practice.

You may consider the following methods to improve efficiency:

control interruptions

- by accepting telephone or office contacts (unless urgent) at specific times of the work day and limiting "open door" policies, particularly during the most productive hours and when meeting with clients or peers

focus on one task at a time

- trying to complete each task without interruption

delegate

- by assigning work to firm personnel or other professionals, ensuring proper supervision

cultivate effective time management skills

- by learning to overcome or manage procrastination
- by learning to place limits on or refuse unreasonable requests whether from potential clients, existing clients, or colleagues

keep time records

- for individual client matters and also consider keeping a personal time log of all activities, billable and non-billable, to determine what activities are non-productive or inefficient

adopt procedures to eliminate inefficiencies

- by avoiding meetings unless necessary, making use of telephone conferences and having and following meeting agendas
- by keeping a record of what work was accomplished to avoid duplication of work
- by keeping files organised and, when not in use, returning files to their proper cabinet or location to allow for easy and efficient access and to prevent loss
- by ensuring that all documents are promptly dealt with and filed away, perhaps implementing a "never touch a document more than once" rule
- by standardising and systematising routine tasks.

■ Time Planning and Reminder Systems

You may also consider maintaining all of the following systems:

To Do Lists

- setting out what must be accomplished, daily or otherwise organised in order of importance

Desk Diaries or Calendars

- to plan their time on a daily, weekly, monthly and yearly basis
- to act as reminders for
 - appointments
 - attendances relating to client matters
 - crucial dates including
 - limitation periods
 - requirements for government documentation

■ Centralised Reminder Systems

These systems should assist in

- flagging limitation periods and deadlines
- follow up, to ensure individuals respond to reminder notices on time
- reminding individuals of steps to be taken in particular files.

You should assume or assign, usually to their secretaries or administrative assistants, responsibility for

- diarising key dates in time management systems
- ensuring compliance with deadlines.

Remembering that ultimate responsibility for meeting deadlines and limitation periods rests with you.

You should conduct periodic, usually monthly, reviews of all open client files to ensure that work on all files is being completed in a timely and cost-effective manner.

Time Recording and Billing Systems

You should record or docket all your time, billable and non-billable, on each client file or matter. For each client, you should specifically record

- client name
- matter/project/job reference and code
- activity or work performed, including all telephone attendances and correspondence
- time spent on the activity or work.



We help you find time

To effectively manage your time you can incorporate an electronic daily timesheets to

- record immediately as the activity or work begins
- ensure that time entries are recorded integrated with the accounting package on a daily basis

When considering a suitable electronic time billing system, you should ensure that you can easily

- explain services that were performed
- accumulate the total time expended on the particular activity
- minimal interaction with the keyboard for starting and stopping time clocks
- flexible and easily adapted to your work practices
- permit the recording of billable and non-billable time
- easy to edit, as we can all make mistakes
- simply integrated with existing software and is ODBC compliant
- produce interim and final statements of accounts for services rendered to clients
- produce time data for monthly, quarterly and annual reports to assist in management of the law firm
- locally supported to ensure quick response to your needs