

Life Balance for Lawyers

By Irene Leonard

In the high-speed world of schedules, commitments, stress, and demands on time and energy, balance seems elusive. Balance is comparing the needs and wants of your professional life and your personal and family life and making decisions as to how to juggle competing interests. Balance is not a static place, it is dynamic, as the balance point is always changing. The good news is that the balance you achieve in your practice is up to you.

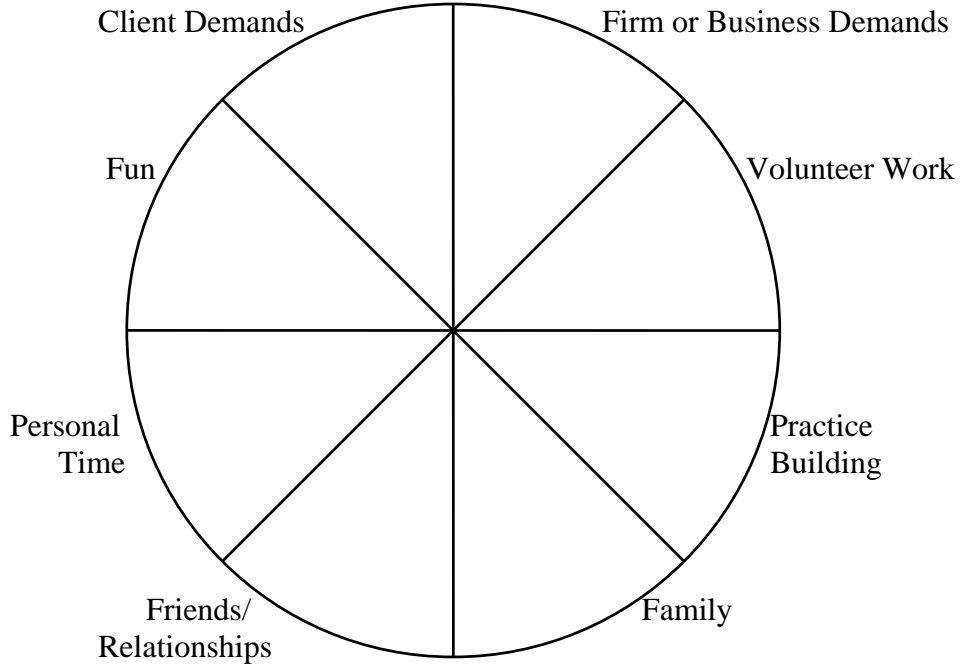
Some days, weeks, or even months you can accept the high pace necessary to serve your client, but then you need to carve out a slower less frenetic pace in order to maintain a balance so that you have the energy to sustain yourself and avoid “burnout”. Along that path to achieving balance it is important to remember that balance is personal; what might be a balanced practice to you is likely to be completely different from the lawyer in the next office.

Balance requires consistent and conscious thought about the choices or decisions you are making at any given time. When you say *yes* to something what are you saying *no* to? And *visé versa*? Being in balance requires that your actions be in alignment with your choices.

Here are 10 steps to help you achieve balance in your life.

1. Complete a self-assessment. This will take time to examine where you are, but it is a most important first step. What are your strengths and weaknesses in balancing your practice with your life? See Exhibit A, the Balance Wheel, to help with your assessment.
2. Come up with a life plan. What do you want? Design your plan to comply with your personality and operating style. See Exhibit B, for Envision Your Balanced Life exercises.
3. Establish clear goals and write them down. Make sure they are specific, realistic, measurable and timely. Include a financial goal that will reduce your dependency on a large income so you can broaden your life balance possibilities.
4. Identify and live in alignment with your values. See Exhibit C for a values determination exercise.
5. Identify your priorities. See Exhibit D for a Yes/No exercise.
6. Learn and practice time management skills. See Exhibit E.
7. Determine what will motivate you to implement behavioral changes. Identify what will stop you from achieving balance. Make a commitment to yourself to make the necessary changes in your actions to achieve the balanced life you designed. See Exhibit F for structures to help you.
8. Implement a healthy lifestyle. Maintain a healthy diet, get regular exercise, take personal and reflective time.
9. Give yourself time to practice your new behaviors.
10. Don't let slip ups throw you off course; notice you've faltered and return to your new behaviors.

**Exhibit A
Balance Wheel**



Directions:

Seeing the center of the wheel as 0 and the outer edge as 10, rank your level of satisfaction with each area by drawing a curved line to create a new outer edge. Give each pie slice the applicable number value as well. The new perimeter of the circle represents your Balance Wheel. What do you need to do to improve your satisfaction level with each area?

Name: _____

Dated _____, 2006.

Exhibit B

Envision Your Balanced Life

Use the following to help you envision the life you want:

- Using the Balance Wheel – determine what would give you a satisfaction level of 10 out of 10 on each of the areas of the wheel.
- Imagine your life 5, 10, 20, 30 years from now. What do you want to be doing at each of those times?
- If your life could be the way you want it what would that be like?
- What is like to live in alignment with your values?
- What would you do with your life if money was no object?
- Transport yourself to the future and talk to your future self. What advice would he/she give you?
- Write your own obituary. How do you want to be remembered?
- If your life was more balanced than it is today...what would you have time to do? What would you no longer do? How would your practice improve?
- What keeps you going?

Exhibit C

Values Determination

For each value listed below, circle the number or star that best reflects the relative importance of that value to you. The numbers have the corresponding meanings:

- * A core value – you know this to be absolutely true for you
- 1. Extremely Important
- 2. Very Important
- 3. Important
- 4. Not Important

Acceptance	*	1	2	3	4
Accomplishment	*	1	2	3	4
Achievement	*	1	2	3	4
Ambition	*	1	2	3	4
Adventure	*	1	2	3	4
Altruism	*	1	2	3	4
Aesthetics	*	1	2	3	4
Autonomy	*	1	2	3	4
Beauty	*	1	2	3	4
Broadmindedness	*	1	2	3	4
Caring	*	1	2	3	4
Challenge	*	1	2	3	4
Comfort	*	1	2	3	4
Cheerfulness	*	1	2	3	4
Clarity	*	1	2	3	4
Collaboration	*	1	2	3	4
Common Sense	*	1	2	3	4
Compassion	*	1	2	3	4
Competence	*	1	2	3	4
Competitiveness	*	1	2	3	4
Commitment	*	1	2	3	4
Communication	*	1	2	3	4
Community	*	1	2	3	4
Companionship	*	1	2	3	4
Confidence	*	1	2	3	4
Connection	*	1	2	3	4
Control	*	1	2	3	4

Contribution	*	1	2	3	4
Cooperation	*	1	2	3	4
Courage	*	1	2	3	4
Courtesy	*	1	2	3	4
Creativity	*	1	2	3	4
Dependability	*	1	2	3	4
Determination	*	1	2	3	4
Discipline	*	1	2	3	4
Diversity	*	1	2	3	4
Duty	*	1	2	3	4
Equality	*	1	2	3	4
Energy	*	1	2	3	4
Enthusiasm	*	1	2	3	4
Excellence	*	1	2	3	4
Excitement	*	1	2	3	4
Fairness	*	1	2	3	4
Fame	*	1	2	3	4
Family	*	1	2	3	4
Forgiveness	*	1	2	3	4
Freedom	*	1	2	3	4
Friendship	*	1	2	3	4
Fun	*	1	2	3	4
Genuine	*	1	2	3	4
Happiness	*	1	2	3	4
Harmony	*	1	2	3	4
Health	*	1	2	3	4
Helpfulness	*	1	2	3	4
Honesty	*	1	2	3	4
Honor	*	1	2	3	4
Humor	*	1	2	3	4
Independence	*	1	2	3	4
Influence	*	1	2	3	4
Integrity	*	1	2	3	4
Intelligence	*	1	2	3	4
Intimacy	*	1	2	3	4
Intuition	*	1	2	3	4
Joy	*	1	2	3	4
Justice	*	1	2	3	4
Knowledge	*	1	2	3	4
Leadership	*	1	2	3	4

Learning	*	1	2	3	4
Logic	*	1	2	3	4
Love	*	1	2	3	4
Loyalty	*	1	2	3	4
Nature	*	1	2	3	4
Openness	*	1	2	3	4
Order	*	1	2	3	4
Organization	*	1	2	3	4
Passion	*	1	2	3	4
Peace	*	1	2	3	4
Personal Development	*	1	2	3	4
Pleasure	*	1	2	3	4
Playfulness	*	1	2	3	4
Power	*	1	2	3	4
Protection	*	1	2	3	4
Practical	*	1	2	3	4
Privacy	*	1	2	3	4
Recognition	*	1	2	3	4
Relationship	*	1	2	3	4
Relaxation	*	1	2	3	4
Reliability	*	1	2	3	4
Religion	*	1	2	3	4
Respect	*	1	2	3	4
Responsibility	*	1	2	3	4
Risk	*	1	2	3	4
Romance	*	1	2	3	4
Rules	*	1	2	3	4
Savor	*	1	2	3	4
Security	*	1	2	3	4
Self-Expression	*	1	2	3	4
Self-Respect	*	1	2	3	4
Serenity	*	1	2	3	4
Service	*	1	2	3	4
Sexuality	*	1	2	3	4
Smart	*	1	2	3	4
Spirituality	*	1	2	3	4
Strength	*	1	2	3	4
Trust	*	1	2	3	4
Truth	*	1	2	3	4
Understanding	*	1	2	3	4

Variety	*	1	2	3	4
Vitality	*	1	2	3	4
Wealth	*	1	2	3	4
Wisdom	*	1	2	3	4

2. List the values you identified as your core values:

#

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Now ask yourself on a scale of 1 – 10, with 10 being the highest, how in alignment in your practice or life are you with each value? Note that number in the # column. What does this tell you?

Exhibit D

Yes/No Exercise

Are you able to say no?

Your ability to say *no* is an important component of your practice and life balance equation. It determines how much of your time will be spent doing things you don't want or have the time to do.

How easily you say *no* is a matter of your personality rather than knowledge of time management skills. The ability to say no is not about being mean and aggressive. Instead, it is about being assertive. Learning to say *no* is one of the most difficult skills to learn especially for lawyers dedicated to their clients. However, it is the one of the most valuable because it helps bring you to choice in your life.

Reasons you need to learn to say no include:

- The cost of not saying no will become greater over time.
- The truth is better than not telling the truth.
- Put saying *no* into the larger context. What is really important?
- Realizing that sometimes it will be difficult for you to say no; sometimes there is just pain.
- When you say no you will feel relief in the long run.

Examples of Saying No

- *"I already have a meeting at that time."*
- *"I can start that next week and deliver something by"*
- *"I am not able to handle your matter for two weeks. May I suggest someone else? Or would you like to wait for me to handle it?"*
- *"I'm in the middle of something now. May I get back to you ...?"*
- *"I'm sorry I won't be able to attend. Thanks for asking."*
- *"Let me call you back at 3 pm when I have more time to give you the attention you deserve."*

Say *yes* only if your goals will be met by doing the thing you just said yes to. Say *no* as early as possible.

Complete the following exercise to help you notice that when you say *yes* to something you are saying *no* to something else. Design your practice in such a way that you always know the consequences of a *yes* or *no* answer.

Examples of saying yes and no include:

- Saying yes to working with this new client while saying no to your intuition that this is a client you will not enjoy working with.
- Saying yes to working late means saying no to going home to your family or having some fun outside of work.
- Saying yes to taking Saturday off means saying no to getting your office organized.

Saying Yes --- Saying No

By saying YES to:

I am saying NO to:

1. _____

2. _____

3. _____

4. _____

By saying NO to:

I am saying YES to:

1. _____

2. _____

3. _____

4. _____

Exhibit E

20 Time Management Tips

1. Take *time* to prepare and review your personalized time management plan.
2. Set SMART (Specific, Measurable, Attainable, Rewarding, and Timely) goals. A goal could include tracking all your time, even non-billable time, for a week in order to learn how you spend the time in your day.
3. Identify your priorities. Apply the 80/20 rule. Every time you say *yes* to something you are saying *no* to something else. Make sure you choose your actions. See Exhibit D.
4. Learn to say *no*. See Exhibit D.
5. Learn how to minimize interruptions. See Exhibit D on how to say *no*.
6. Plan for the unexpected. Do not overbook yourself. Create space in your calendar for all the last minute matters that show up in your practice.
7. Learn the skill of delegation. This includes training those you delegate to to meet your standards.
8. Delegate everything that someone else can do.
9. Take time to get organized. This includes cleaning the piles of paper from your office floor.
10. Use **'To Do'** Lists. 'To Do' lists are essential to an efficient use of your time and a way to reduce stress in your practice. 'To do' lists help in situations of overwhelm because they bring perspective and planning back to the situation and put you back in control.
11. Create artificial deadlines to help move a task to action.
12. Identify and eliminate tasks that will not benefit you.
13. No matter how busy you are, don't start the next matter until you have recorded your time. Record your time compulsively. Your time is a very valuable commodity; only give it away intentionally.
14. Learn how long it really takes for you to do things.
15. Schedule or block out time on your calendar for tasks.
16. Defeat procrastination. See Exhibit F.
17. Learn how to control meetings and telephone calls. Have and follow a clear agenda.
18. Learn to control your paperwork. Dump it, delegate it, do it, or delay it.
19. Learn to control your email & voice mail, come up with boundaries and rules regarding them.
20. Set up structures to help you change your behaviors and your attitude. See Exhibit F.

Exhibit F

Structures to Help You Change Your Behaviors

It is important to have structures in place to help you change your behaviors. Consider using the following to help you meet your law practice and life balance goals. Check off all those you are willing to use to meet your goals:

- Visualize your results. (Really imagine what it will look like when you have a balanced practice.)
- Believe in yourself. (Trust, that you have the determination, skills, and knowledge to accomplish what you set out to accomplish.)
- Identify your limiting beliefs. e.g. *“It is not appropriate to say no to clients or senior partners.”*
- Use affirmations. (Affirmations are statements of belief that what you want to happen is already true. For example: *“I am efficient and get what needs to be done, done.”*)
- Check in with your core values. (Notice whether you are in alignment with your values in the actions you are taking.)
- Work with a buddy. (Work with a co-worker or friend to create accountability and motivation in reaching your goals.)
- Work with a professional such as a coach. (Use the professional’s expertise to help you see what might be holding you back.)
- Break the goal into small achievable steps and take action on the first step.
- Maintain discipline. (Just do the difficult!)
- Give yourself rewards for your successes.
- Use penalties. (Give money to an organization you don’t like when you fail to do something you say you will do.)
- Manage your procrastination. (See the following section for ways to do that.)
- Use your calendar. (Block out time for yourself.)

In order to achieve balance it is important to identify those things that stand in your way of achieving balance. Examples of things that may stop you:

1. Being worried about being selfish.
2. Putting the needs of others before your own.
3. Resisting change.
4. Being worried about what others will think.

Managing Procrastination

Consider whether any of these reasons are reasons you procrastinate. On a scale of 1 – 10, with 10 being that you are absolutely guilty of doing this, how do you rate yourself?

- ___ You are trying to do too much.
- ___ You don't know what to do or how. This usually means you need to do some research.
- ___ Your standard is too high. Perfectionism holds you back.
- ___ You choose to do other things. You are saying "yes" to other things.
- ___ You are not convinced of the benefits.
- ___ You are not committed to the matter.
- ___ You have some limiting belief that is getting in the way. (*I can't do this.*)
- ___ You are afraid you will fail. Raise your consciousness about your fears.

Then consider these options for defeating or managing procrastination. The following ideas may help you take action on what you have been procrastinating. Rank on a scale from 1 to 10, how likely you are to do any of these things (10 being extremely likely).

- ___ Break the objective down into small steps.
- ___ Choose the first easy step you can take and get started. Action leads to further action.
- ___ Do the hard thing first.
- ___ Find out what you need to know. Do the background research.
- ___ Be realistic. Let perfectionism go.
- ___ Remove it from your "to do list" because you don't really want to do this thing at all.
- ___ Delegate the matter to someone else.
- ___ Hire someone else to handle the matter.
- ___ Notice the critical self-talk and stop wasting energy.
- ___ If the way you think you should do this has not worked so far - come up with something else. Compare what works in handling others matters.
- ___ Fire the client.
- ___ Say "no" to something else.
- ___ Schedule time in your calendar.
- ___ Take a deep breath and start.
- ___ Set deadlines that you share with someone.
- ___ Stop, or don't do this thing if doing it results in your not being in alignment with your values.

Noticing Fear

How does fear keep you from your goals? On a scale of 1 – 10, how likely are the following to stop you from doing things, with 10 being you absolutely won't do something for fear of this?

- ___ Making mistakes
- ___ Losing respect
- ___ Being rejected
- ___ Being embarrassed
- ___ Making a bad decision
- ___ Because you are uncomfortable asking for what you want
- ___ Not knowing enough
- ___ Looking as if you are desperate
- ___ Doing something you have never done before
- ___ Talking with someone you don't know
- ___ Losing your job
- ___ Losing a client

Bibliography, Resources and Suggested Readings

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<http://www.transformingpractices.com/> Steven Keeva's website to explore meaning and pleasure in law practice.

www.BusinessActionCards.com to order cards that are a fun, effective way to help with time management skills.