



# Mastering Productivity: A Comprehensive Session to Getting Things Done for Legal Professionals

December 2023

# Today's Agenda

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## Today, we're going to cover:

- In-house legal team project management pain points
- How to build a productivity process for your department
- *Note while we will discuss some of the principles in Get Things Done® and other frameworks, we are not affiliated with or endorsed by them. Just huge fans and recommend you check them out.*





**Jonathan Greenblatt**

VP, Legal  
**LinkSquares**



**Danelle Nation**

Sr. Product Manager  
**LinkSquares**



# Questions to ask yourself

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- How do you keep track of your commitments, including both those that are requested from other and those that are self-initiated? Do you have a reliable system in place that captures **all** your commitments?
- Think of one legal matter you have going on right now. Do you know what the next tangible steps you need to take are to drive it to completion?
- Do you have a methodology for managing all your various work commitments?
- **Example:** At 10:45 am tomorrow, do you have a framework for figuring out what you will actually work on at that moment?



# The Standard Solve: to do lists

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## Checklist

- Update State of California regulatory registration
- Update privacy policy
- Shareholder resolution
- New ad for streaming services  
Gift for LinkSquares charity auction
- Lease dispute letter



# To-do lists can be limiting

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- To-do lists often contain vague reminders that aren't linked to any specific outcomes or actions.
- Often they result in a collection of unclear items that you're not quite sure how to tackle.
- Consider what needs to happen for a project to be complete. What's the next tangible step you need to take?



# To-do list alternative: Think in terms of projects

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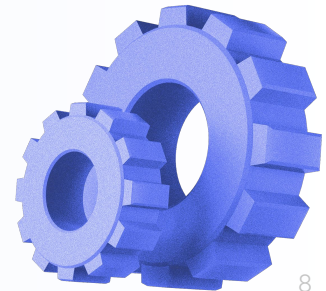
- A project is comprised of multiple tasks
  - Strategy
  - Operation
  - Outcome
- Tasks are physical actions that can be taken
- Why is this important?



# In-house Legal Team Productivity Pain Points

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- Legal teams are constantly flooded with a stream of tasks and requests
- Requests come in through many channels
- Viewing and prioritizing *everything* is time consuming
- Business stakeholders are left without a clear understanding of what legal is working on and where time is being spent
- Leads to working on low-value quick wins vs. higher impact work

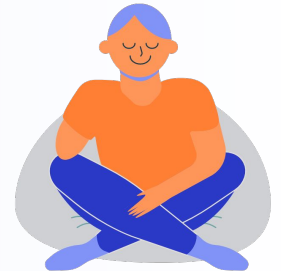




# Productivity through legal project management

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- **Why legal project management?**
  - Drive business growth and efficiency by focusing the team on the highest impact work
- **How to optimize productivity?**
  - **Request management:** collect and organize everything you have to do
  - **Prioritization:** a way to decide what you do first
  - **Time management:** a way to structure your day so that you get the most important things done



# Legal Project Management Use Cases

## Day-to-day legal projects

- Marketing and PR content reviews
- Corporate governance work
- Contract drafting and review

## Strategic projects

- Internal legal playbooks and policies
- Legal outside spend
- Personnel management

## Longer projects

- Dispute and litigation
- M&A
- Intellectual property filings



What's the framework look like for these projects?

# Collect

It's about collecting everything that's on the mind

- Outstanding projects → create current list

Create an intake space for projects until you decide what to do with them

- Email, productivity tools, collaboration tools, texts
- Physical items
- Your own personal notes

Get out of your head!  
Create as few buckets as possible

- Need to do now (EOQ deals)
- Long term projects



# Process

This step helps make sense of all the things that were captured.

- This is the step where you can begin triaging the projects

Is it actionable? YES!

- What project is committed to AND what is the next action required?
  - If less than two minutes → Do it
  - Defer, Delegate, Escalate
  - If project put it on project list

Is it actionable right now? NO!

- Remove/delete
- Someday/maybe (incubate)
- Reference



# Organize

A project is a desired result that requires more than one step.

Cannot “do” a project -  
only do the actionable  
steps towards it

- Organize strategy and tactics for each project

Plan for a project

1. Define purpose and principles - ask why
2. Outcome vision - what would success look like
3. Brainstorm - how will you achieve
4. Organize sequence of events and subcomponents and deadlines
5. Identify next action and when to do it

Things to keep

- List of projects
- List of tasks/next actions
- Waiting for list
- Calendar
- Someday/maybe list
- Project support materials and reference files



# Project planning lists

## Update State of California regulatory registration

- Download form from CA website
- Email Niki HR for officer information and notify officers
- Schedule meeting with CLO for approval
- Go to CA regulatory website and submit

## Update privacy policy

- Go to website and download current policy
- Read current policy in full
- Schedule meeting with marketing and product team to discuss practices
- Get Angelica (marketing team) and Christine (product team) to review privacy policy and provide a Google doc with feedback
- Review updated privacy laws (CPRA, VCDA, CPA, DPADPA)
- Edit current policy based on feedback
- Email updated policy to Julie at ABC Law Firm for feedback (schedule call if necessary)
- Incorporate edits in new draft
- Email final to Angelica and Christine for final approval
- Email marketing current version for uploading to website

## Shareholder Resolution

- Review call notes with Vishal (CEO) on specifics of resolution
- Email Shannon from VC Co ABC and Craig from VC Co DEF to set up time to discuss
- Search files for exemplar and draft resolution
- Send to Vishal for circulation
- Send for signature post-circulation and collect necessary signatures
- Inform Vishal requisite signatures are complete
- Archive document for easy access

## Review new ad for streaming services

- Marketing should submit the intake request
- Ashlyn in Legal to verify whether any restrictions in the streaming terms
- Ashley in Legal to review for IP issues in images, text, and sounds and verify accuracy of marketing claims
- Ashlyn to verify correct acting contracts are in place
- Mary in Marketing to review for brand alignment issue
- Send approval email to David in Marketing and Mary in Marketing once all tasks are done



# Review/Reflect

Magic of GTD is when your workflows are regularly reviewed!

## Review regularly

- Calendar
- Tasks
- Data
- Intake channels (as a double check)

## And also less regularly

- Projects
- Waiting for others
- Someday/maybe list

## Value

- This helps prioritize your tasks and keep the statuses up to date
- Reviewing regularly allows you to get clean, get current, and get complete. You can also make updates to statuses of individual tasks.
- This brings awareness of your tasks, helps you prioritize, and ensures nothing slips through the cracks.



# Engage

## Types of work

- Doing predefined work
- Work as it shows up
- Project management upkeep:  
Processing/organizing/reviewing (see above)

## Factors for choosing actions in the moment

- Time available
- Energy available
- Priority
- Context (specific physical location and situation)

## Priorities

- Benefit/Cost analysis: What's the value of getting it done....what's the risk if I don't
- What are my overall life priorities v. day to day
- Eisenhower matrix - urgent v. important (urgent and important; urgent and not important; important and not urgent; and not urgent and not important.
- MoSCOW (Must, Should, Could, Won't)





# Legal- specific SWOT with project methodologies

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- Legal often deals with everyone's priority, even other organizations' priorities, which to them is important and urgent.
  - Figure out what is the “north star,” SLAs with expected volume of work, and escalation paths.
- Outcomes and goals can be vague or change of legal projects and can differ among stakeholders
  - Good way to show legal value is by facilitating clarity and alignment.
- Project management in legal is often very collaborative both internally in legal and externally.
  - Ensure you have good processes for collaboration. Understanding who has next action step. This is an area technology is extremely helpful.
- The steps in legal work are often repeatable.
  - Automate your tasks and processes. Save time at the organization stage of each project with predetermined tasks and playbooks. Create consistency.



# Driving Business with Project Management

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- Project management tools help legal teams streamline workflows by centralizing all work in one place
- Processes provide scalability, allowing in-house legal teams to manage and track work effectively
  - Crucial for growing businesses that need to handle increasing volumes of legal work.
- Particularly beneficial for legal teams - automating routine tasks, freeing up valuable time for more complex legal work.
- Legal project management can improve the team's efficiency by providing key performance indicators (KPIs)
  - Metrics can help legal teams measure their performance and identify areas for improvement.



# Other methods

## Pomodoro Method

### How to tackle it:

- Break your work into 25-minute chunks
- Train your brain to work in sprints to maintain high productivity while preventing burnout

## Eat the Frog

### How to tackle it:

- Overcome procrastination
- Do the biggest roadblock/least interesting task first



# Importance

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- The impact on the company's bottom line



More deals closed



More money saved



More time spent on more demanding tasks

- Most importantly - free up mental space!



# Additional Resources

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- eBook: [But I'm a Lawyer, Not a Project Manager!](#)
- Book: Getting Things Done by David Allen
- Book: Deep Work by Cal Newport
- [Forbes List of Other Methodologies](#)



# Thank you!

Any questions?