



TIME MANAGEMENT & PRODUCTIVITY SELF-ASSESSMENT

PART ONE

Score each the following statements as follows:

- 1 = Never or rarely; not true
- 2 = Sometimes; sometimes true
- 3 = inconsistently; intermittently true
- 4 = Most of the time; largely true
- 5 = Always; definitely true

Name _____

Title _____

Date _____

SECTION ONE: DESIRED RESULTS

SCORE (1-5)

1.	I have <u>specific, measurable</u> goals in writing that describe what I am working to accomplish in my practice in the current year and for the next year	
2.	I do not spend, on a routine basis, more time working in the evenings, on the weekends and during vacation than I want to or feel I should	
3.	I know the gross fee income I must collect (or be responsible for generating) in my practice to meet my minimum take-home revenue target given my comp formula	
4.	I am clear about what I need to do to improve the non-financial satisfaction I derive from working in my practice	
5.	Overall, I believe it is <u>possible</u> for me to become much more effective at managing time and workflow, even if I don't yet know how to do it	
TOTAL		

SECTION TWO: PLANNING

SCORE (1-5)

1.	I follow a daily routine in which I isolate uninterrupted time to focus on planning the upcoming day and week	
2.	I review my calendar of scheduled commitments (i.e., items already on my calendar) each morning for the current day and for the next two business days	
3.	I proactively reschedule previously calendared items with sufficient notice to the parties involved when I see that my schedule is going to get too congested	
4.	I devote extra time on Friday afternoon, the weekend, or on Monday morning to analyze the week ahead and adjust my activities accordingly	
5.	I have time scheduled on my calendar to plan monthly, quarterly and annual goals, and I keep those appointments with myself (and my team, if applicable)	
TOTAL		

SECTION THREE: ORGANIZATION**SCORE (1-5)**

1.	My desk is free of clutter and I use the right furniture to store my files, books, notebooks, etc	
2.	The only files in my office are those I'm actively working on or will be working on within one week; all other files are removed from my office and easily retrievable	
3.	Our document management software and filing system are set up properly and I know how to use them well; I/we spend little time looking for documents	
4.	I use rules, filters and subfolders to keep my email organized	
5.	I keep multitasking to an absolute minimum in order to focus on one thing at a time	
TOTAL		

SECTION FOUR: CAPTURING & REVIEWING TASKS**SCORE (1-5)**

1.	I use an effective system to capture my "to-do's" so I don't worry about having to remember too many things in my head	
2.	I think about and compose my to-do's as specific "next actions" rather than ideas, projects, or even file names	
3.	My system allows me to easily categorize different types of tasks (e.g., legal assignments, client contact, team meetings, administrative, personal)	
4.	I review my to do's as part of my daily and weekly planning and keep my lists updated regularly	
5.	My system includes an organized way to capture phone calls and emails that I need to initiate or respond to, and which I use in my daily planning	
TOTAL		

SECTION FIVE: PRIORITIZING & SCHEDULING**SCORE (1-5)**

1.	I have a clear thought process for deciding what I must accomplish for the day given the amount of "white space" (unscheduled time) on my calendar	
2.	I have recurring activities (e.g., staff and workgroup meetings, communications time) blocked off on my calendar and on my admin's calendar	
3.	Each morning, I block out specific times on my calendar to work on specific tasks	
4.	I accurately estimate how much time a particular "next action task" is going to take – or how much time I will devote to it on a given day	
5.	At least once each week, I choose to work on, and schedule time for, capacity-building tasks that are "important but not urgent" (e.g., upgrading my tech skills)	
TOTAL		

SECTION SIX: DELEGATING & SUPERVISING**SCORE (1-5)**

1.	I do not take on (or hold on to) work or tasks that someone else could and should do	
2.	I provide specific instructions for each task I delegate including the specific deliverable, the deadline, communication expectations, and progress check-ins	
3.	I invest time and resources to build the capacity of my team so I can confidently delegate more to them and keep just the work that only I can truly do	
4.	I provide delegates with specific and timely feedback (both reinforcing and corrective) – and solicit their input on process improvement -- on a regular basis	
5.	I have an effective system for tracking all the tasks that I delegate and for coordinating multiple team member inputs to any one assignment	

TOTAL**SECTION SEVEN: OPTIMIZING PROCEDURES & SYSTEMS****SCORE (1-5)**

1.	We periodically examine and upgrade the workflow of our most common <i>legal matters</i> and capture them in checklist or flowchart form	
2.	We periodically examine and upgrade the workflow of our most common <i>administrative processes</i> and capture them in checklist or flowchart form	
3.	My staff and colleagues are incentivized with specific rewards to make our procedures and systems more efficient and effective	
4.	Our hardware and software is configured properly and is rarely problematic	
5.	I/we actively support our personnel in developing their knowledge and skills to become increasingly efficient with our technology	

TOTAL**SECTION EIGHT: MANAGING EXPECTATIONS****SCORE (1-5)**

1.	I pre-empt problems with clients and colleagues via frequent conversations that define assignment expectations; there are few complaints about delays	
2.	I communicate clearly with clients and colleagues when the number of assignments outpace the resources and time available to handle them	
3.	I comfortably reframe expectations for when and how long I will be available when someone's interruption or tardiness threatens to throw me off my schedule	
4.	I do not allow unnecessary interruptions, and I model appropriate boundaries and standards by not interrupting others, being on time, being prepared for meetings, etc	
5.	My staff and colleagues have confidence that my calendared schedule for any given day accurately reflects my commitments and availability	

TOTAL

SECTION NINE: KNOWING & GROWING YOURSELF

1.	I understand my personality and work-style preferences and how they shape my efficiency and effectiveness, and how they impact my interactions with others	
2.	I know my strengths and weaknesses and consciously leverage my strengths, and put in place support to compensate for my weaknesses	
3.	I am aware of the values that drive me and the personal goals I aspire to, and I intentionally align my approach to my work with those values and goals	
4.	I have successful strategies for recognizing and overcoming tendencies that hamper my effectiveness such as adrenaline addiction or procrastination	
5.	I actively cultivate improved mental, emotional, and physical health, and work-life balance	
TOTAL		

Now, add up your totals from each section and enter them in the center column, below.

STEP	Your Score	Mastery
1. Desired Results		25
2. Planning		25
3. Organization		25
4. Capturing Tasks		25
5. Prioritizing & Scheduling		25
6. Delegating		25
7. Optimizing Systems		25
8. Managing Expectations		25
9. Knowing and Growing Yourself		25
TOTAL		225