



Paralegal Division of the State Bar of New Mexico

Brown Bag Discussion Group

June 16, 2021

Presented By: Devany Whipple

Tips and Tricks for Calendar Management & Productivity

Brown Bag CLE

By Devany Whipple

A little bit about myself

- Paralegal for 5 years
- Nationally Certified through NALA
- NM Paralegal Division Board Member
- NM Paralegal Division Scholarship Chair
- IPE Faculty member for CLE's

Calendar Management

Hard Deadlines & Calendar Entries

Hard Deadlines and calendar entries are the ones you don't want to miss or are harder to reschedule. Such as:

- Court Deadlines
- Hearings

Hearings can be rescheduled but only with approval of the court

Determining Court Deadlines

- Check the Court's Website
- Carefully read Orders and Notices Thoroughly
- Know “trigger” Documents:
 - Discovery – Answers
 - Motion – Response/ Reply
 - Petition/Complaint - Response

Setting apart Hard Deadlines & Calendar Entries

- Use all caps or bold
- Use a Bright or contrasting color
- Set a "warning" date
- Use reminders
- Communicate the deadline with others:
 - Ensure they have access to you calendar or the deadline calendar
 - Put it on at least one other person's calendar

Soft Deadlines & Calendar Entries

Soft Deadlines and calendar entries are deadlines that you can easily request an extension on or an appointment that you can easily reschedule.

- Client Appointments
- Settlement Proposals
- “pre” deadlines

Soft Deadlines & Calendar Entries

- Use lowercase
- Pick a mellow color
 - Yellow
 - Blue
 - Green
 - Pink
- Use Reminders

Use a good Calendar

- Outlook
- Clio
- Google
- Teams
- Legal Server

*What other calendars do you
use?*

Outlook Sample

Calendar - kathyt@lucernepubintl.com - Outlook

File Home Send / Receive View Help Adobe PDF Tell me what you want to do

New Appointment New Meeting New Teams Meeting Today Next 7 Days Day Work Week Week Month Schedule View Add Share

April 2019 < > April 22 - 26, 2019 Washington, D.C. Today 77°F / 63°F Tomorrow 67°F / 57°F Saturday 68°F / 57°F Search Current Folder

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
22	23	24	25	26	
Paris	East Co	Seattle			
3 PM	9 AM	6 AM			
4	10	7			
5	11	8	Personal Trainer	Personal Trainer	Personal Trainer
6	12 PM	9	FW: Meeting -- Daily Standup; Co	FW: Meeting -- Daily Standup; Co	FW: Meeting -- Daily Standup; Co
7	1	10	Market Plan Review Microsoft Teams Meeting Lee Gu		Engineering round table Microsoft Teams Meeting Lee Gu
8	2	11	1 on 1 Adele; My Office	Planning Meeting Conf Room Baker Nestor Wilke	
9	3	12 PM			Lunch with Adele Cafe 36 Kathy Thompson
10	4	1	Daily Sync; Teams; Miriam Graham		
11	5	2	FW: Meet for launch planning ; M	Team Meeting Conf Room Rainier Joni Sherman	FW: Meet for launch planning ; M
12 AM	6	3			
1	7	4			Project Review Conf Room Adams Miriam Graham
2	8	5	Project Review Conf Room Adams Miriam Graham		
3	9	6			
4	10	7			

98.9 GB Free Items: 24 All folders are up to date. Connected to: Microsoft Exchange 100%

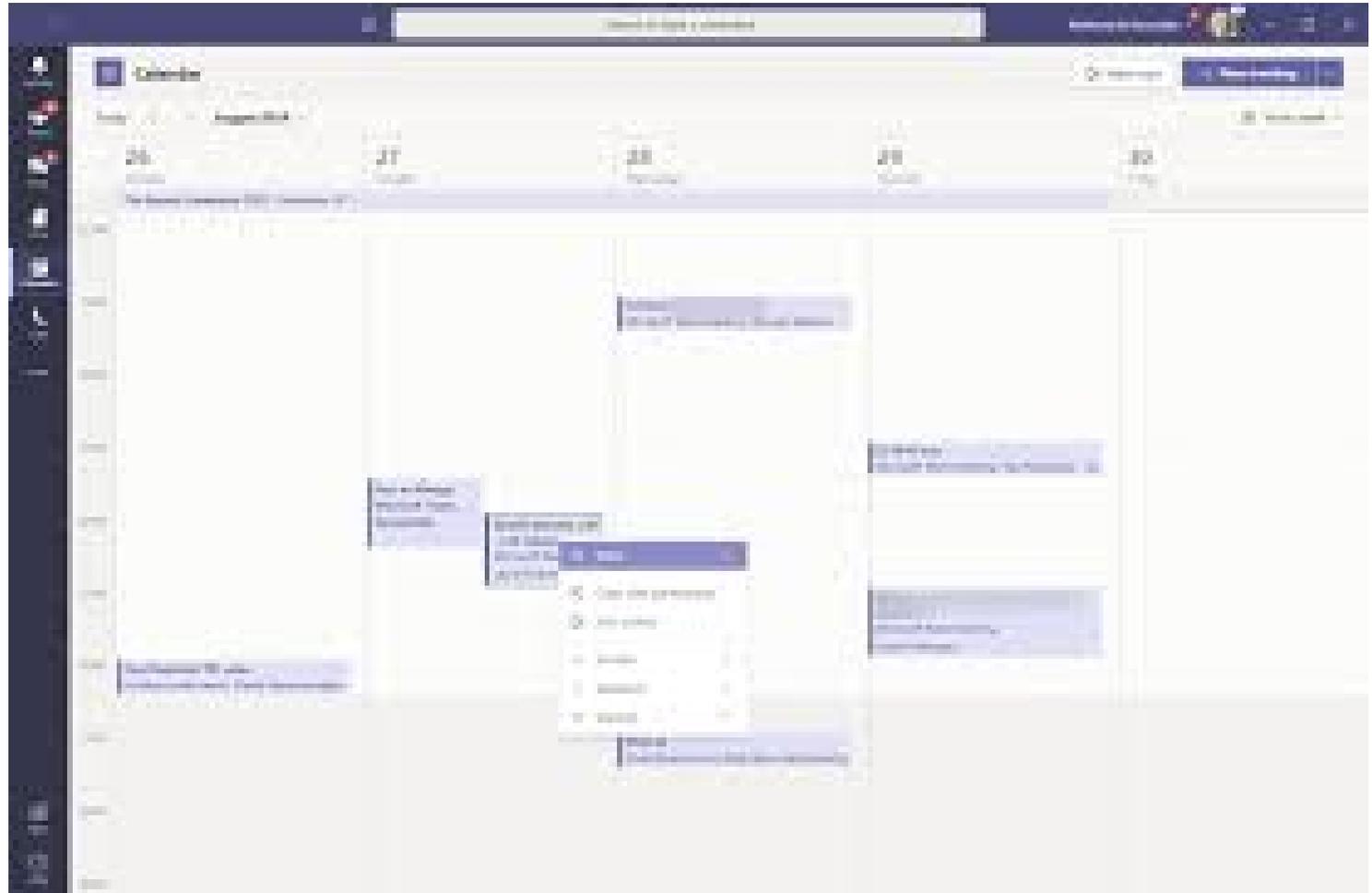
Clio Sample

The screenshot displays the Clio calendar interface for January 2020. The calendar is viewed in a weekly layout, showing events for each day from Sunday to Saturday. The events are color-coded and include titles such as 'Initial Discovery Meeting', 'Client Discovery Session', and 'Client Discovery Session - 2nd' through 'Client Discovery Session - 31st'. The interface includes a search bar at the top, navigation buttons, and a sidebar with a list of categories. The categories listed are: My categories (Marketplace, Fee, Continuous Flow, Calendar, Team, Document Upload), and Other categories (Billing/Disburse). A 'Help' button is visible in the bottom right corner.

Google Sample



Teams Sample



Legal Server Sample

Calendar view for February 2018. The calendar shows a grid of dates with tasks listed in the cells. A yellow highlight is present on the 1st of the month.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 New Legal Server Office - see Community Call 15					2 New Onboarding Task 8	
3 New Legal Server Office - see Introduction to Bus				4 New LAs Code of Ethics		
5 New Legal Server Office - see Intake Functionality				6 New Legal Server Board New Legal Server Board New Onboarding Task 8		
7 New Legal Server Office - see Recruitment and Hire				8 New New Admin Trainer		
9 New Legal Server Office - see HR/HR/REPORT TASK				10 New Onboarding Task 8		

Event description and location: New York

Google Calendar

Maintaining Master & Personal Calendars

- Go old school – Physical Calendar
- Sync calendars
- Time block personal appointments on your work calendar
- Make Important items stand out

Calendar Time Saving Tips

- Calendar in extra time between entries
- If possible, add detail to the description
- Don't overwhelm your calendar
- Confirm Appointments
- Batch calendaring tasks
- Double check the calendar
- Color Code
- Easy Access

How to be More Productive

To-Do list Rules

- Ditch the Sticky notes
- 6 Item Rule
- Assign due dates
- Have more than 1 to-do list

Set goals

- Daily Goals
 - Task to get done within that day
- Weekly Goals
 - Task to get done within that day
 - Goal to have a weekly staff meeting
- Long Term Goals
 - Quarterly letters to clients
 - Monthly case reviews

Keep your goals realistic

Things to Keep in Mind

- What needs done sooner?
- What takes longer to do?
- What are you most likely to procrastinate on?
- How long will appointments take?
- Are there any deadlines?
- Does it require travel?
- What does the attorney schedule look like?

Prioritizing Tools

- Electronic Task Lists
 - Clio Tasks
 - Legal Server
 - Outlook tasks
 - Monday.com
 - Things App
- Stay Flexible
- Discuss/Communicate
time period

Prioritizing Tools

Continued

- Color Code
 - Red- urgent
 - Orange – Normal
 - Yellow– Low
- Review case status
- Know your productive time period

Time Block

Time Block for both you and the attorney's

- Block off time for large tasks
- Block off work/Do Not disturbed times
- First thing in the morning
 - Check email
 - Return calls
 - Check calendar

Batch Tasks

Set your to-do list in groups:

- Draft all letters at the same time
- Draft Similar pleadings at the same time
- Draft all Memo's at the same time
- Return all calls at the same time

Communication Management

- Use the Flag function
- Be prompt
 - Return calls/ answer emails within 24 hours
- Know personalities

Avoid Time wasters

- Email
- Procrastination
- Your phone
- Coffee
- Run all errands at the same time

What are your time wasters?

Tips & Tools

- Dropbox
- Adobe Acrobat Pro DC
- Create Templates
- Call-Em-all
- Google Voice

Tips & Tools Continuation

- Scan Genius

- iPad

- Note Apps

(ex: Goodnotes, OneNote, etc.)

What tips do you have?

What tools do you use?

Questions?

REMINDERS:

We have monthly FREE Brown Bag CLE's & you do not have to be a member to attend!

Check out our Website or Facebook for upcoming events!