

Time Management, Mindfulness Keys to Meaningful Work-Life Balance

Do you yearn for more work-life balance? If you do, then follow this checklist:

- Do you have good time and work organizational skills?
- Are you good at managing your schedule?
- Are you making the best use of technology?
- Are you setting work-life balance boundaries and priorities?
- Can you make a long-term commitment to your own work-life balance?

If you didn't check these off your list, all is not lost on achieving that sometimes-elusive balance between the demands of home and work.

First things, first.

"I am a strong believer that you cannot have adequate work-life balance if you do not have good organizational and time-management skills," said Leigh Ann Benson, Cozen O'Connor, Philadelphia.

Benson was one of several panelists who spoke at two recent Pennsylvania Bar Institute (PBI) webcasts: "Achieving Balance: Work from Home/Work from Office 2023" in early March and "How to Obtain Realistic Work-Life Balance in the Legal Profession in 2023" in early April.

"I don't think that you can be disorganized and be efficient with your time," she said. "Poor time management absolutely is detrimental to work-life balance. If you cannot manage your time, you're going to find your work is creeping more into your personal life."

Time allotted for work can easily impact your personal time.

"I definitely think that poor time management inevitably leads to a diminished sense of balance," she said.

Consider how your time management tactics impact other people.

"One thing I try to do is *not* send people emails over the weekend,



Leigh Ann Benson



Matthew M. Haar



Courtney B. Schulnick

because I don't want to intrude on their time," said Matthew M. Haar, Saul Ewing LLP, Harrisburg, and PBA Unit County governor. "If it's something that can wait until some other time, I'll either wait to send the email or I'll schedule the email to be sent at some other time. Be cognizant that when you're using your own time, you're impacting other folks as well."

Avoid Rapid-Fire Emails

Attorneys are reminded that when communicating via email, put yourself in their shoes and don't rapid-fire many emails to one person.

"If you get five emails in a row into your inbox from one person, and they're just a couple sentences or, even worse, a couple words, that's very stress-inducing for the recipient, so avoid doing that," Benson said. "Try to put your whole thought in a complete, cognizant way in a single communication. We can all agree that there's a ton of email traffic in this profession and probably just in the world today, and the more we can cut down on that, the better."

Time management also includes putting up with work interruptions.

"I think it's smart to plan for 30% of your time each day to be taken up with unforeseen interruption," Benson said. "If you sit down and say, 'I know exactly what I'm going to get done from 8 until 6 today,' it's never going to happen. You're always going to be interrupted. Things are going to come up. That will always mean that you end your day feeling unaccomplished, that you're behind and you didn't get to everything, so always try and schedule out 30% of your time (it will get filled), and then 70% of your time with tasks that actually will be feasible to get done, whether it's today or not."

Benson suggested using set, self-imposed intermediate internal deadlines for caseloads and other projects.

"Don't just look at a filing deadline, don't just look at a closing date," she said. "Set deadlines that are reasonable and attainable for every step of the way, to help keep you on track. If you're working on

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a team, if you're an associate working with numerous partners, share those deadlines, even though they are self-imposed.

It's just accountability."

Benson believes a lot of meetings are not always the most efficient use of time.

"Schedule buffer times between meetings," she said. "If you have a meeting scheduled from 2 to 3, and someone asks, when are you available to speak? Don't tell them 3, tell them 3:15. Take those 15 minutes, refresh, catch your breath and check your inbox. If not, you're just running back-to-back and you're always going to feel behind. It's just going to constantly feel like you're spinning."

Prepare agendas, she said.

"If you have a meeting and you sit down to make an agenda, and you can't, you might not need the meeting," Benson said. "It also helps you organize your thoughts, and it shows your colleagues, your clients, whoever else it is that would be a participant to that meeting, that you are also organized, official and using their time well."

There are 1,001 different ways that somebody can organize themselves, and it's just a matter of figuring out what works best for you, she said.

"Maybe you're a pen-and-paper-checklist person," Benson said. "One-Note is becoming very popular: I don't use it, but it's becoming more popular. I use Google Checklist. There's a thousand different ways to do things out there, and you don't know all of them. Speak with your peers, with your colleagues and ask others what they're doing and what works for them."

"Consider the use of technology as much as you can in organization and time management, whether that's how to schedule things, how to let other people see your schedule, so they can work with it," Haar said. "You need to be very intentional about how you are communicating with other folks, whether it's people within your firm, other professionals or clients. I think that the word for communication is 'intentionality.'"

Changes to Landscape

Many changes to the landscape of work-life balance have taken shape since the pandemic began affecting all industries, including the practice of law, since March 2020, and which continue well into 2023.

"We learned that probably nothing's going to go back to exactly how it was," said Ellen Freedman, PBA law practice management coordinator and *Pennsylvania Bar News* columnist. "We're going to have a new normal."

Freedman said there were many attorneys who reached out to her during the pandemic.

"I was overwhelmed, the entire time, with people struggling," she said. "I must have heard at least 100 times, 'I can't wait until this pandemic's over, so I can go back to the way things were.' The reality is we're never going back to exactly the way things were. Not everyone wants to go back to the same work model."

Workers found out they were more efficient, more productive, and they don't want to go back to the model that they had before.

"We need to formulate a strategy so that we know what we're going to do going forward," Freedman said. "Instead of waffling, instead of saying we'll temporarily extend this, we will modify it slightly in a temporary way and see how that goes, we really need to have a new policy that says this is going to happen from now on, like it or leave it. Hopefully, your strategy will have enough in there that people will like it and stay, as opposed to not like it and leave."

Freedman pointed out a recent law firm survey indicating that those who work primarily from the office made up 30% of respondents. Those working primarily from home made up 39% of the respondents. Attorneys who are permitted to work remotely as needed, and staff who work exclusively or mostly in the office, made up 31% of the respondents.

"The results of that survey do not surprise me at all," Freedman said. "They reflect what I am hearing and seeing, and what little surveys infor-

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mally have been done in the marketplace.”

But consistency is critical. “The one that is most disturbing and is most likely to cause turnover is that third option, where we are openly discriminating in the policies between what attorneys can do and what nonattorneys can do,” she said.

Reduce Stress

For now, what can attorneys and staff do to reduce stress in their lives?

One way is to take moments of time throughout the workday to rest and notice how you are. It doesn't have to be a large segment of time. Every little bit of “present-moment awareness” can go a long way to reducing stress.

Jon Kabat-Zinn, the pioneer of the Mindfulness-Based Stress-Reduction program (MBSR), defines mindfulness as “paying attention, on purpose, in the present moment, with an attitude that is nonjudging,” said Courtney B. Schulnick, Marshall Dennehey PC, Philadelphia. “It's easy to get caught up in our worries of the future or perhaps lost in the past. And given the demands of the work that we do as attorneys, oftentimes we fall into a mode of constant doing, which Kabat-Zinn refers to as ‘being on autopilot,’ totally unaware of the present moment. As attorneys, we spend much of our time resolving problems and putting out fires for clients that we are often completely disconnected from ourselves, both in mind and body.”

Attorneys and legal staff “have a tendency to be extremely judgmental of themselves, judging themselves on whether they win or lose a case, an oral argument, a motion, and so on,” Schulnick said. “Moreover, much of our work doesn't stay within the four corners of our offices. Since the pandemic, the boundaries that once separated the work world from our personal lives have largely dissipated, resulting in our work essentially following us wherever we go, 24/7. The inherently stressful nature of working in the legal sector, combined with our judgmental tendencies and

long hours spent working, can leave us feeling agitated, exhausted and prone to burnout.”

Now, more than ever, Schulnick said, it's clear that boundaries are needed to help cultivate better self-care and promote greater life balance. It's also important to recognize the benefits of giving ourselves permission to rest.

“When we are overworked, we can become more susceptible to maladaptive coping mechanisms, such as drugs, alcohol and overeating to ‘take the edge off,’ but that further compounds our stress levels and can result in physical illness and disease, to the point of possible burnout.”

The American Bar Association (ABA) Model Rules of Professional Conduct underscore, in Rule 1.1, that attorneys are required to provide “competent representation, but we can't best serve the needs of others, such as our clients, our loved ones, maybe even our pets, others that we care for, if we're not in a good physical or mental space,” she said. “But we can level the playing field, so to speak, and the way that we can

do that is with mindfulness. Mindfulness allows us to be aware of our present moment experience so that we can notice when we're becoming a bit agitated, or maybe we're lost in worry of what's to come, or we're striving really hard to have a case turn out a certain way, or maybe we're beating ourselves up for something we feel we could have done better, or differently. That awareness is really the gateway to choosing how to respond most skillfully, as opposed to getting caught up in automatic reactivity.”

Schulnick said that with a regular practice of mindfulness, we can start to notice how we get in our own way and create unnecessary suffering for ourselves. We can learn ways to better manage stress and the stressors in our lives. And, through mindfulness, we can cultivate kindness and be less judgmental of ourselves. As a result, we are able to obtain moments of ease, even in the midst of what can sometimes feel like chaos.

Schulnick guided the PBI webcast participants in a formal mindfulness meditation based on the acronym of

PRO, which stands for “pause, relax and open.”

She explained that with the first guideline of pause, “We allow ourselves to pause in the moment and notice how we are with a sense of kindness and curiosity. You may notice sensations within the body, a very busy mind, certain mood states, all the while remembering to let go of judging and, as much as possible, let yourself be just as you are.”

With the second guideline of relax, “we simply invite the mind and the body to soften, to let go, without forcing ourselves to feel any particular way. And, the last step is to open more fully to our present moment of experience,” she said.

The day of the webcast was International Be Kind to Lawyers Day, “and it all begins with being kind to ourselves,” Schulnick said. “Giving yourself moments to practice being a PRO, even if it's just a few moments, can be a great act of kindness and self-care.”

While the formal practice of mindfulness can be hugely beneficial, PRO can be informally woven

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34 Young Lawyers Sworn Into U.S. Supreme Court



Thirty-four young lawyers were recently sworn into the U.S. Supreme Court during a Washington, D.C., trip planned by the PBA Young Lawyers Division.

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into our daily lives, Schulnick said.

"It's not necessary to sit on a cushion in a lotus pose," she said. "You don't have to carve out a certain area or a quiet space in order to practice PRO. If you're sitting at your desk, in a deposition, or dealing with a difficult adversary, in that moment, you can choose to pause, perhaps notice the sensation of the body breathing, invite any areas of tension throughout the body to soften and open to the moment from a more centered space."

Mindfulness and other stress-reduction techniques will have an impact that may differ from small to large firms.

As the founder of a small firm, one attorney sums it up with her own personal priorities.

"My motto is: Do you live to eat or eat to live? Do you live to work or do you work to live?" said Jacqueline B. Martinez, who practices immigration

law at JBM Legal LLC, Pittsburgh, and serves as PBA secretary. "I work to live and I live to eat, so I am a big foodie person. To me, family is important. That was one of the main reasons for me looking at small firms."

At small firms, flex time in an attorney's workday can be rewarding for those parents with young children or those caring for elderly parents, encompassing a "lot of different demands," Martinez said.

"At Wilson Elsner, the attorneys have flexible time," said PBA Past President Kathleen D. Wilkinson, Wilson Elser Moskowitz Edelman & Dicker LLP, Philadelphia, and panel moderator. "You can basically take whatever time you need off, within reason. A wellness group puts on wellness programs from time to time. We're very committed to wellness. We've had wellness walks."

Wilkinson said that, while she was president of the association, the PBA adopted the 2018 ABA Well-Being Pledge Campaign, designed to address the profession's troubling rates of alcohol and other substance-use disorders, as well as mental health issues.

"Nowadays you can work remotely: You can work from home," Martinez said. "I am in Florida and I'm working, so you know you have different types of opportunities with a small firm. Also, you can work part time. We've had part-time attorneys in our firm, and we also have copartnering, where somebody else backs them up. Timewise, it's more flexible within a small firm."

Clients place huge demands on the firm, Martinez said.

"There's a phrase that somebody told me the other day called 'compassion fatigue,'" she said. "And we get that. You feel for your clients, you want to help them, and it really brings down a lot of people. Within the immigration law community, there is a lot of stress because of that."

Everybody experiences financial stress, Martinez said.

"We have a lot of our clients that end up being pro bono, not because we wanted to but because there's no way that we can collect from them," she said.

Be Flexible

One of the ways the firm reduces its financial stress is by working on a flat-fee basis.

"We try to do everything by flat-fee retainer," she said. "It takes some of the stress off within the billable hours and the staff. We found that the solution to managing the stress is to prioritize. We use a system that I've always used, and it keeps the deadlines and keeps everything else very realistic."

Martinez said the staff has lunchroom common meals, "and we talk with each other. We get to know each other about what's stressing us and how we can help each other. We want to create an atmosphere within the office, create a team and we do a lot of events with family. We get to know each other, at least with our staff, and we try to have a close bond."

The firm allows sick leave, gives a day off for every federal holiday, and provides health insurance, pension and set work hours from 9 to 5, with breaks for lunch. Employees abstain from working evenings and weekends.

"People want to bring their pets to the office, and I'm OK with that," Martinez said. "Pets change the atmosphere. They help with some of the stress."

Martinez said the firm wants to create a collegial, respectful work environment.

"You want to go to work, you want to spend your time there, but at the same time you work so that you can live, you have a life," she said. "That is the goal for my practice and my team."

Hone Listening Skills

As a law firm leader, it is important to hone your listening skills.

"Listening skills are so important, and I think that you have to be very intentional in learning them," Benson said. "I don't think anyone can effectively be told they're not a good listener, because they're not going to listen to that! Some people might just be inherently not a good listener and are dealing with an influx of distractions."

Listening needs to be intentional, according to Benson.

"If you feel that everyone around you is a poor communicator, it's probably a good idea to reflect on whether or not you're a good listener," she said.

Achieving work-life balance can be tricky from one work generation to the next.

"Millennials are the first to demand work-life integration," Freedman said. "Gen X wants work-life balance: They want a reasonable amount of time to be in the office and a reasonable amount of time to be home or off work. But it's different for millennials. These people have been 'Zooming' with computers and the internet from birth. They need to be able to switch seamlessly throughout the day between their work and their personal life, and do things together, getting it all done, but basically on their own terms. Personal things don't always wait for after 5 or 6 or 7, or they don't always wait for the day off. They are demanding that integration be made possible through employer flexibility."

Along with integration comes mentoring.

"When it comes to the workplace, millennials want structure, they want a good mentoring program," Freedman said. "They want to know exactly what the expectations are, and they want acknowledgement of just doing their job, not doing an outstanding job, just doing the job that's expected to be done."

"If you're going to take on a formal mentoring assignment, it's really important that you're honest with yourself that you have both the time and the willingness to take it on," Haar said.

"I'm such a proponent of mentoring," Benson said. "I know that there's a lot of talk out there about formal mentoring programs and finding your mentor and all of that. I also think that so much of effective



Jacqueline B. Martinez

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mentoring is organic. I think that for younger attorneys getting into the profession and finding their way early on, it's really important not to take just somebody who was blindly assigned to be your mentor but rather looking for those people who you want to emulate the way they not just practice but the way they live their lives, the way they balance their lives, who they are as a person, their character, their integrity, etc. So just be so observant when you're

getting started."

Benson said that it's important for junior lawyers to find people who are "not just senior attorneys who have been doing this for decades, who have the utmost knowledge of the law, but also people who are just 2-4 years ahead of you and more closely related to this situation that you are facing on a day-to-day basis as a young attorney. You can learn from them as well."

It's important for legal professionals to "pay it forward," she said. "There is always going to be someone junior to you who can learn from you. So even

if you're a first-year associate, mentor a summer associate. If you're a first-year associate, get involved with a law school program so you can meet law students and help mentor them as well."

Diversity Essential

To many firms, being diverse can reduce stress across the board.

"This is a big thing for me: diversity, why diversity matters in a work-life balance," Martinez said. "It's a given that diversity and wellness are symbiotic. I've been very fortunate that our firm has been very diverse. We have had people from all parts of the globe, speaking all different languages, and the atmosphere is that everybody's much more considerate, people are kinder, people are eager to know about people that have diverse backgrounds, and we're all a team. It makes a great environment."

"We learned that we can adapt to change," Freedman said. "Attorney DNA has usually been very averse to any kind of change, but we learned that we could do that, and we didn't die. We found out that we can be more efficient doing things in a different way."

Get feedback from your employees, she said.

"You need to find out what are their feelings, what are their desires, and in particular what do they think might need to be modified for them to have the tools they need for them to still feel part of the office," Freedman said. "Throw some of those challenges right in their lap and ask them: How are we going to maintain the culture, from your perspective?"

"Setting reasonable expectations for work-life balance is helpful," Benson said. "I'm a sucker for a lot of the click-bait out there about wellness, mental health and work-life balance and all of that. I think it's very important to also read all those articles and read them through the lens of a lawyer and what your professional responsibilities are."


Another item that Benson said falls under the same umbrella: Do you understand why you're working and what you're working for? What are your goals? It's important for this to be professional and personal as well.

"There's a whole lot of overly dramatic things out there about work-life balance," Haar said. "Look at them with a critical eye and balance it against the idea that there are many, many inputs to work-life balance."

"The more opportunity you have to create teamwork, the better prepared your office is going to be when you have that sudden client emergency that requires people to pool their relative resources and help one another," Freedman said.

The process toward work-life balance is not always very easy.

"It is not a giant leap forward," Freedman said, "where suddenly you go from where you are to where you want to be. It's lots of little changes. I can help you identify small, incremental steps to help you go through those changes."

Share your reactions or comments about this feature with Andy Andrews, editor, at Andy.Andrews@pabar.org. 



Upcoming Events

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