



# AttPro Ally

It's time for a

FRESH  
START



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*Adapted by Kate Gould from seminar materials by Margaret Spencer Dixon.*

Yes it is! – though many lawyers may argue there just isn't enough time in the day to accomplish everything they must do professionally and personally. Rest assured, you can employ certain time management strategies to maximize your productivity and leave the office feeling satisfied with your work day. What's more, realizing that there is no perfect lawyer, no perfect work product, no perfect analysis, and no perfect strategy, can be incredibly liberating.

Meg Spencer Dixon, a lawyer and consultant specializing in time management, project management, and stress management seminars and coaching for lawyers and legal professionals, continues to insist that the word "gullible" is indeed in the dictionary.





So, how can you do this? Accept that there will always be room for improvement and consider implementing these tips for time management in 2026:

### **1. Juggling Multiple Cases and Projects**

Break down large projects into smaller chunks and invest the necessary time to figure out the individual tasks that must be done to complete a project. Then, work on them for thirty minutes here and a few minutes there and delegate tasks as needed.

On a daily basis, create and maintain a to-do list that includes all tasks, including short and long term projects. And while it may be tempting to create any overly ambitious list, be reasonable in terms of the number of tasks you can accomplish that day in light of your appointments and commitments and then prioritize them.

### **2. Dealing With Client Emergencies**

While it is important to expect the unexpected, it is critical that you distinguish between true client crises and those generated by a lack of planning. Always look ahead on your calendar for any potential conflicts among multiple client deadlines and determine whether legal projects are progressing sufficiently to meet court, filing, or other official deadlines.

### **3. Managing Client Communications**

Despite our best efforts, we all admittedly keep a somewhat constant eye on our email inbox throughout the work day. However, to ensure you stay on task and not get distracted by that email ping, differentiate processing from triaging. Consider your quick glances at Outlook as triage where you look for important or urgent items that must be handled immediately. Processing is different and means you plan time to focus your full attention on your inbox and reply to all client communications and other incoming messages.

### **4. Keeping Up With Changes in the Law**

Your desk can quickly become cluttered with advance sheets, legal periodicals, or and other items of professional reading. When the magazine or article hits your desk, quickly skim it to determine whether it is worth reading. If it is, save it in a separate file to review and get into the habit of grabbing this file whenever you might have a few minutes to spare, perhaps during your commute or when you find yourself in a waiting room for an appointment. You can also set a few minutes aside each day devoted to keeping up with professional reading and don't hesitate to set a timer if that would help you complete the task.

### **5. Dealing With Client Demands**

Be sure to monitor your workload and anticipate how long it will take you to complete your work. After all, learning how to estimate completion time is a critical function of the legal experience. Once armed with a strong sense of your current commitments, don't hesitate to decline client requests if necessary. Although it can be difficult to say "no," better to decline the work than provide an untimely or poor product.

Consider responding with something to the effect of "I'd love to work with you on this, but at the moment my plate is so full that I'm afraid I wouldn't be able to give this important matter the attention it deserves." You can then offer alternatives to the client, such as a partner or colleague at your firm who has the bandwidth to take on the matter.

### **6. Striving for Perfectionism and High-Quality Work**

As lawyers, we strive for perfection in everything we do. However, commit to giving each legal project the time it deserves. For example, aim to do only B+ quality work for your initial draft of a brief, pleading, or other legal document. Expect that you will make some mistakes during the course of a project but try to catch them early and when you revisit your draft, use the time saved to revise, edit, polish, and otherwise improve that initial version.

### **7. Maintaining Concentration**

Try to minimize physical and mental clutter to reduce temptations for distraction. An organized work space is important, so reserve your desk for only the essential tools of the trade: your computer, phone, pen, and a notepad. Building in mental breaks can also aid in helping you stay focused, and you can take these as needed or at prescheduled times during your work day.

### **8. Tracking Billable Time**

To keep accurate time records, you must record your time as you complete a task. Consider jotting down a brief description of the planned task before you start working on it to stay focused and ensure you capture the time in case you are interrupted.

### **9. Dealing With Client Interruptions**

In our business, client interruptions are inevitable. However, try to triage them quickly and decide whether changed circumstances warrant revising your daily plan. If it is helpful for your practice, try to plan your daily schedule anticipating expected interruptions so you have built in time to address client emergencies if necessary.

### **10. Managing Stress**

Rest is productive. Whether passive (sleeping and relaxing) or active (exercising and eating nutritious meals), give your body and mind the necessary time to reset so you can be at your best at work. And, understand that some stress is actually good. As long as you allow for adequate recovery time, regular exposure to stress can actually improve your ability to handle the daily pressures of the job.

As the year draws to a close and you reflect on your goals for the next year, make sure you put everything through your own professional common-sense filter. All of these tips cannot be implemented overnight, and there is not a one-size-fits-all approach to time management. But, by aiming to incorporate these tips and techniques little by little in your practice, you might see them turn into helpful habits that better serve you and your clients.



# NO TIME LIKE THE PRESENT...

By: Kate Gould, Esq.

To review your billing practices, that is. Give yourself the gift of financial peace of mind by taking a fresh look at your billing practices and ensuring your legal bills reflect your true value.

Starting at “0” on January 1 can be a little deflating. After what was likely a strong push at the end of the year, whether you were striving to hit an hourly or financial goal or encouraging clients to make that final payment before year end, it can be difficult to keep the momentum going into the coming year. So, perhaps take a minute during the lull between Christmas and New Year’s to review your billing practices and consider what improvements you can make in 2026.

## What Are My Ethical Obligations When Billing My Clients?

But first, the rules. Sometimes, the more you are involved in the administration side of the practice, the more you can become removed from the “why” when it comes to your bills.

ABA Model Rule 1.5<sup>1</sup> governs our duties with respect to the fees we charge our clients. While it may seem like a simple transaction – you set an hourly rate or contingency fee percentage and the client agrees to pay it – there are several considerations when determining a reasonable fee for your work. The Rule outlines factors such as the time and labor required, the novelty of the legal issues involved, and what fees are customarily charged in your area for similar services. You may also consider the amount of money at stake, the nature and length of the professional relationship with the client, and your level of knowledge and experience. While you can set a general hourly rate for the year, note that you can adjust that rate depending on the circumstances. In other words, if you have a longstanding relationship with the client and they find themselves embroiled in high stakes litigation

with novel legal questions, you may consider increasing your rate. However, remember that any changes in your rate or increase in the anticipated expenses should be communicated to the client in writing.

Although an exception to Rule 1.5 exists such that lawyers do not have to provide a new written fee agreement for regularly represented clients if they will be charged the same rate, a new year is a good opportunity to review your existing agreement. You may find that you have not increased their rate for a couple years or that even if you do not intend to increase their rate, you should provide them with an updated agreement if you have revised your general form.

Rule 1.5 also governs contingent fees. Subsection (c) of the Rule requires a contingent fee agreement to be in writing and specifically state the percentage or percentages that accrue to the lawyer in the event of settlement, trial, or an appeal. Make sure your clients understand how the expenses will be deducted from the recovery, including whether they will be deducted before or after your fee is calculated. Your contingency fee agreement should also explicitly state what expenses the client may be liable for whether or not they are the prevailing party.

Finally, in the excitement of settlement and anticipation of disbursement, you may overlook the need to provide the client with an accounting. Note that the Rule requires that upon conclusion of a contingent fee matter, you must provide a written statement, itemizing the fees, expenses, and remittance to the client, based on your fee agreement. As a best practice, have your client sign this statement with an acknowledgement of its accuracy before disbursing funds.

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Kate Gould is a Risk Management Consultant for AttPro. She is a frequent co-presenter for AttPro’s free CLE webinars. Despite having a Christmas Eve birthday, her parents always wrapped her gifts in birthday paper – something she now fully appreciates as an adult navigating the busy holiday season!



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## How Can I (Or My Firm) Improve My Billing Practices In The New Year?

While fully revamping your billing practices and procedures may seem a little daunting, consider making a single change to increase your efficiency or accounts receivable this year. For example, commit to sending a bill immediately when you achieve a major milestone in the case. Because briefs can come with a hefty price tag, send the bill with a copy of the Order of Summary Judgment in your favor. The client may promptly pay in appreciation of your hard work and the successful result.

And while legal services don't necessarily go on sale (though your client may expect it after being inundated with holiday ads and emails), consider periodically offering professional discounts throughout the year. For example, document every phone call and email you have with the client (this recordkeeping is essential for malpractice protection as well), but you may be able to write off a few of those courtesy communications as the matter progresses. Likewise, if you discover some inefficiencies on a bill – like excess time spent on research or revising a demand letter – flag them, reduce the charge accordingly, and show the write-off on the invoice so the client can see the added value at no cost. It may not be a blockbuster holiday discount but everyone appreciates feeling like they received something “extra,” including clients.

I have fielded several phone calls this year on our Risk Management Hotline during which lawyers acknowledged a phone call may have been better received than an email – whether to a client or opposing counsel. While it is undeniably easier to send a quick email than to call a client about a recently issued larger bill, taking the time to invite the conversation and address any questions can foster trust and help prevent any potential fee disputes. Remember – you want to be the phone call they make for any future representation opportunities or referrals. While a difficult phone conversation may be uncomfortable in the moment, it can promote timely payment and ultimately make a difference in your bottom line.

Finally, be proactive in training your associates how to bill. Consistent billing entry techniques across the firm are important to ensure your clients receive timely and accurate statements. For example, consider adopting a firm-wide formula as to how each entry should read. You may also require contemporaneous timekeeping as a task

is completed and have a weekly deadline for all time to be entered. These policies will ensure that attorney time is appropriately captured, and it will likely save you time in reviewing bills before they are sent.

## What Is The Impact Of AI On Billing?

The intersection of artificial intelligence and legal billing is just one of the many issues our profession faces when it comes to ethically integrating AI into our practices. As more and more firms are turning to AI to increase efficiencies in delivering legal services, an increased need for billing transparency is necessary.

In July 2024, the ABA issued its first formal opinion, Formal Opinion 512<sup>2</sup>, regarding the use of AI in the practice of law, in which it specifically addressed Model Rule 1.5. The opinion states that if a lawyer uses an AI tool to draft a pleading and spends fifteen minutes inputting information into the platform (subject to their client's agreement and adherence to confidentiality constraints, of course), they may charge for that time plus the time necessary to review the draft. So, be mindful of the time actually spent on a task as padding your time is a clear breach of your ethical duties to provide a reasonable and accurate bill for your fees.

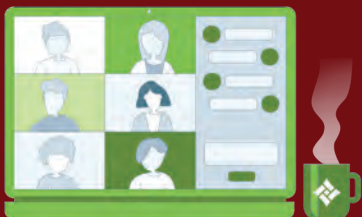
The time you spend on a particular task should be adjusted to accurately reflect the use of AI. In other words, if a legal memorandum on an issue in your case was produced within mere seconds (subject to your careful review and confirmation that no case citations were hallucinated by the bot), you cannot charge the client the two or three hours it would have otherwise taken you to research the topic and draft the memo. By leveraging AI, an individual client may benefit from cost efficiencies in their legal bill, but lawyers gain the invaluable gift of time to dedicate to additional files and higher value work that day.

Amid the flurry of the holiday season and year-end obligations, take a moment to reflect on billing enhancements and efficiencies you would like to bring into 2026 as you neatly tie a bow on 2025.

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<sup>1</sup> [https://www.americanbar.org/groups/professional\\_responsibility/publications/model\\_rules\\_of\\_professional\\_conduct/rule\\_1\\_5\\_fees/](https://www.americanbar.org/groups/professional_responsibility/publications/model_rules_of_professional_conduct/rule_1_5_fees/)

<sup>2</sup> [https://www.americanbar.org/content/dam/aba/administrative/professional\\_responsibility/ethics-opinions/aba-formal-opinion-512.pdf](https://www.americanbar.org/content/dam/aba/administrative/professional_responsibility/ethics-opinions/aba-formal-opinion-512.pdf)



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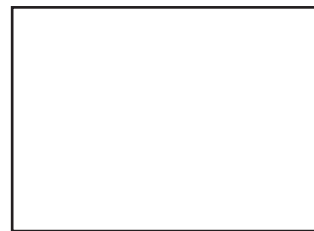
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Monica has over 20 years of expertise in the insurance industry. She is an avid animal lover and shelter volunteer who is passionate about cooking, fishing, spending time with her daughters and of course insurance!

