

Stress Management Through | Better Practice Management

About Me

Program Director and Legal Studies/Paralegal Program Instructor at Madison College. Previously managed a department and litigated cases for a creditor's rights firm in Milwaukee.

Dedicated close to six years to the State Bar of Wisconsin as their Law Practice Assistant Manager. Provided over two thousand consultations, authored more than fifty published articles, and delivered over one hundred presentations, all focused on practice management, technology, and their ethical implications.

Holds undergraduate and Master of Business Administration degrees from the University of Wisconsin–Oshkosh and completed a Juris Doctor at the University of La Verne College of Law in Southern California.



Outline



Managing

Billable Hours



Setting

Boundaries



Streamlining

Workflows to
Reduce Stress



Avoiding

Burnout



1. Managing Billable Hours

1. Managing Billable Hours



Let's start with some basic math.



2,080 hours is a significant number to keep in mind.



Why? Because it reflects 52 weeks in a year multiplied by 40 hours per week.



It's also significant because some firms require even higher billable hours—and that number doesn't account for vacation time or the non-billable hours we spend on clients.

1. Managing Billable Hours



Large Law Firms: What are your minimum billable requirements for the year? Do they differ for attorneys at different stages of their careers? How can attorneys be set up for success when billable expectations leave little time for vacation or de-stressing?



Medium-Sized Law Firms: What are the billable hour expectations compared to large firms? Is there ownership in the firm, and what pressures exist to keep the bills paid? What is the work culture among the other owners of the firm?



Small Law Firms: What is the monthly breakeven point for the firm? Do you have a support network of colleagues you can reach out to with questions? Are you in a community where you must take certain cases because of how few lawyers there are?

Minimum billable hours are the system we have always used, and there are no better ones out there.

False — people respond to incentives in different ways.

1. Managing Billable Hours

Alternatives to Unhealthy Minimum Billable Hour Requirements

Managing Partner Forum

- Equal Partnership
- Lock-Step
- Modified Hale and Dorr
- Simple Unit
- 50/50 Subjective-Objective
- Team Building
- Eat What You Kill

2. Setting Boundaries

2. Setting Boundaries

Office of Lawyer Regulation Annual Report, FY 23/24

[Appendix 3 - Primary Grievance Allegations](#)

| | |
|------------------------------|--------|
| Lack of Diligence | 17.18% |
| Lack of Communication | 14.92% |
| Misrepresentation/Dishonesty | 12.55% |
| Improper Advocacy | 9.49% |
| Incompetence | 5.90% |
| False Statement to Tribunal | 4.63% |
| Conflict of Interest | 4.28% |
| Unreasonable Fees | 4.22% |
| Scope of Representation | 3.12% |
| Violation of Oath | 2.89% |
| Failure to Return Property | 2.54% |
| Improper Termination | 2.02% |
| Frivolous Action | 1.91% |
| Criminal Conduct | 1.85% |
| Unauthorized Practice | 1.21% |
| Trust Account Violations | 1.10% |
| Unearned Fee | 1.10% |
| Revealing Confidences | 1.04% |
| Other | 7.48% |

2. Setting Boundaries

No is a complete sentence....

My former colleague, a prior WisLAP director, often reminded us of this during presentations—and it's something I've always remembered.

- It is okay to tell a client you cannot take on extra work outside the scope of the fee agreement.
- It is okay to let an existing client know you are not able to take on future cases.
- It is okay to tell a potential client you will not be able to represent them.

Setting clear boundaries protects your time, your well-being, and your ability to serve clients effectively.

2. Setting Boundaries

Knowing Your Limits

How many cases can you handle at one time?

- **Do the math.** Taking 52 weeks in a year and multiplying by 40 hours per week equals 2,080 hours. That's your total available work time before factoring in non-billable hours, vacations, and holidays.
- **Factor in non-billable demands.** Administrative tasks, marketing, continuing education, and community obligations all reduce your available billable hours.
- **Consider the impact on quality.** Taking on too many matters at once risks errors, missed deadlines, and client dissatisfaction.

Real-Life Example

- When I meet with a client, I often spend about ten minutes of non-billable time asking about what's going on in their life.
- My appointments then run longer than expected, causing other clients and potential clients to wait — and my workday to stretch far past business hours.
- When I get home, I spend time after dinner making notes in the client files, which can sometimes take a few hours.

Possible Solutions

- Limit pleasantries to one to two minutes, provided there is time at the end of the scheduled meeting.
- Rely on your assistant or paralegal to step in and remind you of your next appointment — a standard practice in many offices.
- Use these time savings during the day to reduce the amount of work you need to complete after hours, both in the office and at home.



Suggested Book: [*The Compound Effect*](#) by Darren Hardy

The principle behind the book is that small, consistent actions—whether positive or negative—build up over time to produce significant results. By making deliberate choices and sticking with them, individuals can create momentum that leads to meaningful, lasting change. The key is focusing on incremental improvements and recognizing that daily habits, even if they seem minor, have a powerful cumulative impact.

3. Streamlining Workflows to Reduce Stress

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Suggested Book Reading

[*The Goal – 40th Anniversary Edition: A Process of Ongoing Improvement*](#) by Eliyahu M. Goldratt

- **Background** – Uses a business novel format to explain the Theory of Constraints, showing how to improve performance by focusing on the most critical limiting factors in a process.
- **Identify and address constraints** – Pinpoint the biggest bottlenecks slowing your work and focus improvement efforts there first.
- **Optimize the workflow** – Streamline processes so each step adds value and moves matters efficiently toward resolution.
- **Continuous improvement mindset** – Regularly review performance, adjust strategies, and look for small changes that produce big gains over time.

3. Streamlining Workflows to Reduce Stress

The Process of Ongoing Improvement

Whether we admit it or not, law firms are set up like a manufacturing line.

- **We bring in the work:** the lawyer takes on new clients, just like raw materials entering the front end of a production process. Intake is the first step, and how we handle it shapes everything that follows.
- Those clients **move down the assembly line**, where they are “fitted” with different components — pleadings, contracts, filings, negotiations, court appearances — each handled by the right person at the right stage. Every step needs to be efficient, accurate, and coordinated to avoid bottlenecks.
- Eventually, **the client reaches the end of the line and receives the finished product** — legal representation that solves their problem or meets their needs. The quality at this stage reflects every step taken along the way, and the goal is always to deliver that “finished product” better, faster, and with less waste.

3. Streamlining Workflows to Reduce Stress

Bottlenecks

One of the major roadblocks to maintaining a steady production line is bottlenecks.

- **Difficult clients** – We all know them. These are the clients who consume a disproportionate amount of your time, much of it non-billable, pulling your focus away from steady, productive work.
- **Urgent new matters** – The new clients who walk through the door with an emergency that demands immediate attention, forcing you to reshuffle priorities and disrupt planned work.
- **Other bottlenecks in the firm** – These could be delays caused by clients, colleagues, support staff, or anyone else whose actions (or inactions) slow the progress of a case or project.

3. Streamlining Workflows to Reduce Stress

Goals

Top ways to get more time out of your day.

- **Increasing work hours** – Work more hours, provided your billable time is efficient = **Not ideal!!**
- **Decreasing non-billable hours** – Reduce the time spent not working on client matters. Anxiety, stress, endless scrolling on social media, and other avoidance behaviors can eat up non-billable time, as can the standard administrative tasks involved in representing a client.
- **Improving workflows** – Optimize processes, delegate effectively, and use technology to handle routine tasks faster.

3. Streamlining Workflows to Reduce Stress

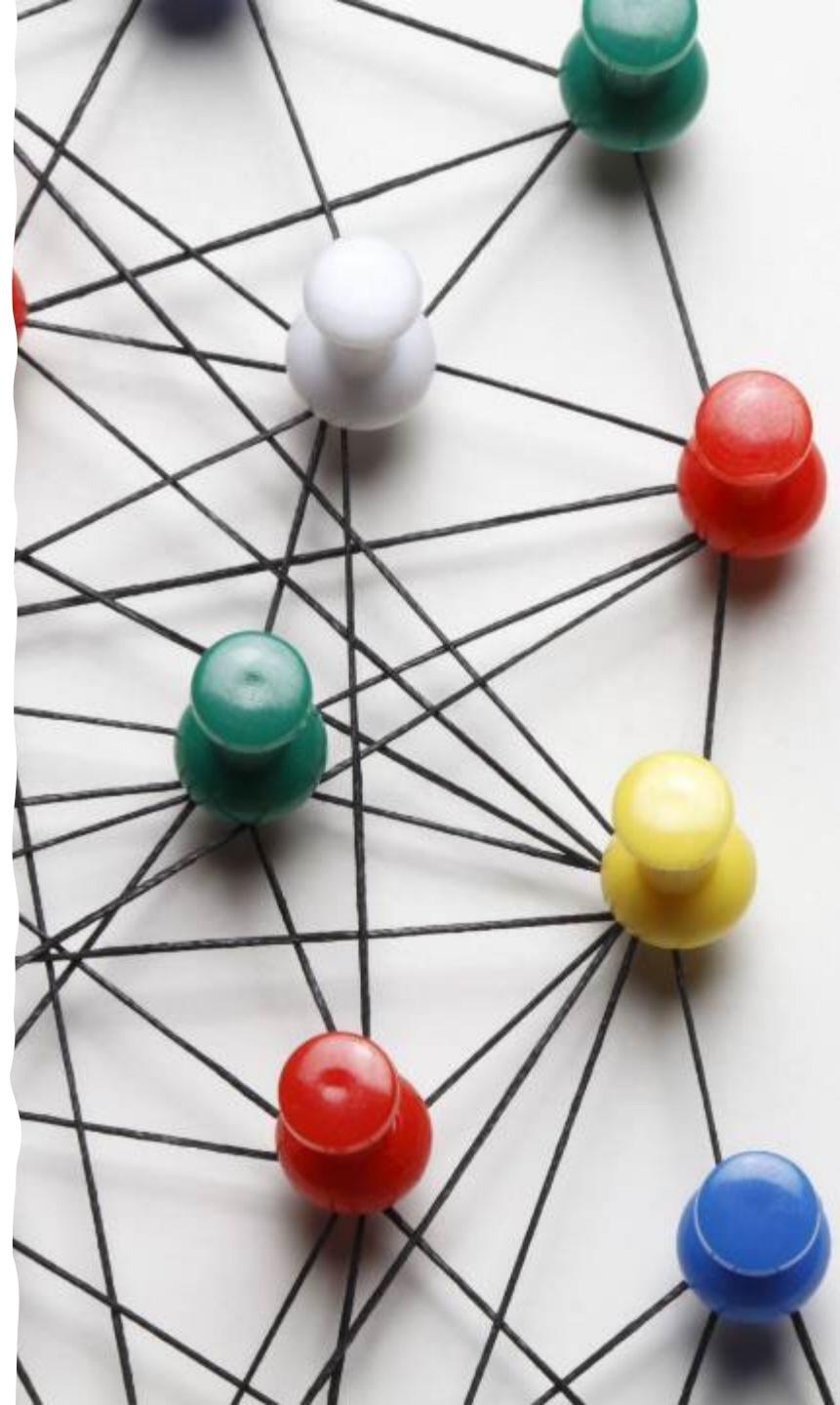
Practice Suggestions

Articles

- [**AI and Emerging Technology Can Increase Law Practice Efficiencies**](#) – “To get started, you can start by mapping out your daily non-billable and billable tasks. The next step is to determine the technology and artificial intelligence (AI) tools that you can use to automate or decrease the amount of time spent on nonbillable tasks.”
- [**Get a Free Check-up: Complete the Updated Law Firm Assessment**](#) – “The updated free self-assessment tool gives Wisconsin lawyers, especially those practicing in smaller firms, a meaningful way to improve their operations, manage risk, and increase client satisfaction.”
- [**Five Tips to Excel as a New Lawyer**](#) – Ask questions, get out there and meet people, and know that everyone has had to learn their knowledge from someone else.

Remember, *The Goal* is to map processes, identify where time is lost or efficiency can be improved, and establish a system for continuously improving the production line of services you provide.

The Compound Effect takes hold when efficiencies are gained — a few hours saved each week can compound over the year into much-needed vacation time or more time with family and friends.



4. Avoiding Burnout



Step 1. Complete steps 1–3 (managing billable hours, setting boundaries, and streamlining workflows to reduce stress).

Step 2. You cannot do this alone — you have a community of people here to support you.

4. Avoiding Burnout

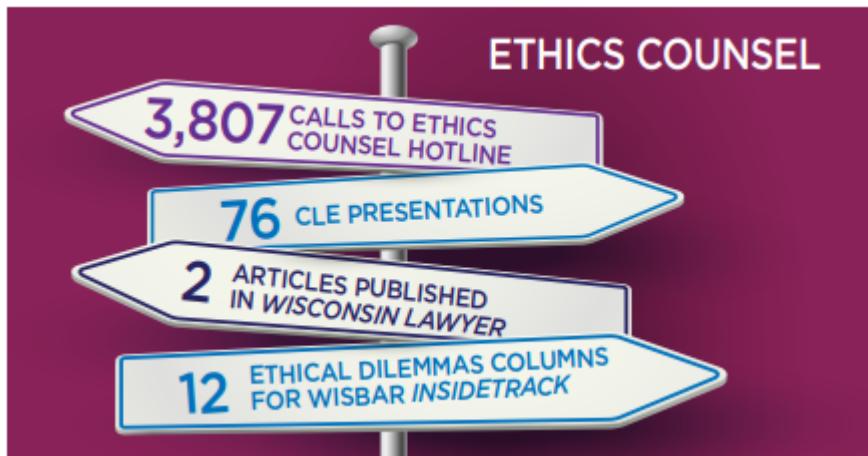
Support Network

State Bar of Wisconsin

- **Wisconsin Lawyer's Assistance Program** - The Lawyers Assistance Program offers confidential well-being support to the legal community. WisLAP staff are available for consultations, mental health trainings, and well-being presentations. Additionally, WisLAP trained volunteers are available for individualized peer-to-peer support upon request.
- **Practice411** - Confidential guidance on the business or technology aspects of running your law firm. For more information, please [schedule a consultation](#) or contact me at practicehelp@wisbar.org or (800) 957-4670.
- **Ethics Counsel** – Contacting the ethics hotline at (608) 229-2017 or (800) 254-9154 for confidential guidance under Wisconsin Supreme Court rules.

4. Avoiding Burnout

What's stopping you from using WisLAP or Practice411?



WisLAP

The Wisconsin Lawyers Assistance Program (WisLAP) offers confidential wellbeing support to lawyers, judges, law students and their families. Utilizing trained peer volunteers, structured wellbeing resources and individualized supportive services, WisLAP aims to promote attorney wellbeing by developing a culture within the Wisconsin legal community that destigmatizes mental illness and substance use disorders and fosters work-life balance.

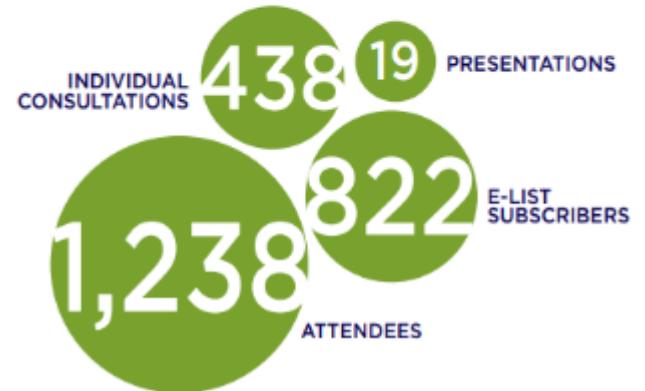


Practice411:

Helping Members Make Solid Business Decisions



For many attorneys, practicing law is only part of their work. Practice411™, a robust practice management assistance program, assists these firms in improving practices and the delivery of legal services.



Source: State Bar of Wisconsin, [2022 Annual Report to the Wisconsin Supreme Court](#).

**Why are attorneys more
willing to call the Ethics
hotline for help than reach
out to Practice411 or WisLAP?**



**We do not have
superpowers, and we
are not superhuman.**

4. Avoiding Burnout

Support Network

Professional

- **Office colleagues** – Trusted coworkers who understand the demands of your role and can provide guidance or just a sounding board. Consider [setting up a well-being program in your firm](#).
- **Local county bar associations** – Opportunities for networking, mentorship, and education with fellow attorneys in your community.
- **Legal specialty groups** – [Statewide](#) or [national](#) organizations focused on specific practice areas that offer resources, forums, and peer support.

4. Avoiding Burnout

Support Network

Personal

- **Churches or faith-based organizations** – Spiritual guidance, community support, and a sense of belonging outside of work.
- **Community meet-up groups** – Local hobby or interest-based groups that provide social connection and stress relief.
- **Friends and family** – Reliable personal relationships that offer emotional support, encouragement, and perspective.

4. Avoiding Burnout

Support Network

Licensed Therapists, Coaches, and Support Groups

- **Licensed mental health therapists** – Confidential, professional support for stress, burnout, anxiety, and other challenges.
- **Life coaches or wellness coaches** – Structured guidance to set goals, improve habits, and maintain work-life balance.
- **Support groups** – Professionally facilitated groups for stress management, grief, or other shared experiences.

A pile of colorful paper scraps, including blue, green, pink, yellow, and orange, each featuring a large, bold black question mark or exclamation point. The scraps are stacked and overlapping, creating a textured, layered effect.

Questions?

Stress Management Through Better Practice Management

I. Managing Billable Hours

A. Bio

- 1) Program Director and Legal Studies/Paralegal Program Instructor at Madison College. Previously managed a department and litigated cases for a creditor's rights firm in Milwaukee.
- 2) Dedicated close to six years to the State Bar of Wisconsin as their Law Practice Assistant Manager. Provided over two thousand consultations, authored more than fifty published articles, and delivered over one hundred presentations, all focused on practice management, technology, and their ethical implications.
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B. Basic Math

- 1) 2,080 hours is a significant number to keep in mind.
- 2) Why? Because it reflects 52 weeks in a year multiplied by 40 hours per week
- 3) It's also significant because some firms require even higher billable hours—and that number doesn't account for vacation time or the non-billable hours we spend on clients.

C. Firms

- 1) **Large Law Firms:** What are your minimum billable requirements for the year? Do they differ for attorneys at different stages of their careers? How can attorneys be set up for success when billable expectations leave little time for vacation or de-stressing?
- 2) **Medium-Sized Law Firms:** What are the billable hour expectations compared to large firms? Is there ownership in the firm, and what pressures exist to keep the bills paid? What is the work culture among the other owners of the firm?
- 3) **Small Law Firms:** What is the monthly breakeven point for the firm? Do you have a support network of colleagues you can reach out to with questions? Are you in a community where you must take certain cases because of how few lawyers there are?

D. Required System?

- 1) Minimum billable hours are the system we have always used, and there are no better ones out there.
- 2) False — people respond to incentives in different ways.

E. Alternatives to Unhealthy Minimum Billable Hour Requirements

- 1) Equal Partnership
- 2) Lock-Step
- 3) Modified Hale and Dorr
- 4) Simple Unit

- 5) 50/50 Subjective-Objective
- 6) Team Building
- 7) Eat What You Kill
- 8) Source: [Managing Partner Forum](#)

II. Setting Boundaries

A. Office of Lawyer Regulation Annual Report, FY 23/24

- 1)

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- 2) Source: [Appendix 3 - Primary Grievance Allegations](#)

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- 1) My former colleague, a prior WisLAP director, often reminded us of this during presentations—and it's something I've always remembered.
 - i. It is okay to tell a client you cannot take on extra work outside the scope of the fee agreement.
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- 2) Setting clear boundaries protects your time, your well-being, and your ability to serve clients effectively.

C. Knowing Your Limits - How many cases can you handle at one time?

- 1) **Do the math.** Taking 52 weeks in a year and multiplying by 40 hours per week equals 2,080 hours. That's your total available work time before factoring in non-billable hours, vacations, and holidays.
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D. Real-Life Example

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E. Possible Solutions

- 1) Limit pleasantries to one to two minutes, provided there is time at the end of the scheduled meeting.
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F. *The Compound Effect*

- 1) The principle behind the book is that small, consistent actions—whether positive or negative—build up over time to produce significant results. By making deliberate choices and sticking with them, individuals can create momentum that leads to meaningful, lasting change. The key is focusing on incremental improvements and recognizing that daily habits, even if they seem minor, have a powerful cumulative impact.
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III. Streamlining Workflows to Reduce Stress

A. [*The Goal – 40th Anniversary Edition: A Process of Ongoing Improvement*](#) by Eliyahu M. Goldratt

- 1) **Background** – Uses a business novel format to explain the Theory of Constraints, showing how to improve performance by focusing on the most critical limiting factors in a process.
- 2) **Identify and address constraints** – Pinpoint the biggest bottlenecks slowing your work and focus improvement efforts there first.
- 3) **Optimize the workflow** – Streamline processes so each step adds value and moves matters efficiently toward resolution.
- 4) **Continuous improvement mindset** – Regularly review performance, adjust strategies, and look for small changes that produce big gains over time.

B. **The Process of Ongoing Improvement** – Whether we admit it or not, law firms are set up like a manufacturing line.

- 1) **We bring in the work:** the lawyer takes on new clients, just like raw materials entering the front end of a production process. Intake is the first step, and how we handle it shapes everything that follows.
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C. **Bottlenecks** — One of the major roadblocks to maintaining a steady production line is bottlenecks.

- 1) **Difficult clients** — We all know them. These are the clients who consume a disproportionate amount of your time, much of it non-billable, pulling your focus away from steady, productive work.
- 2) **Urgent new matters** — The new clients who walk through the door with an emergency that demands immediate attention, forcing you to reshuffle priorities and disrupt planned work.
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D. **Goals** — Top ways to get more time out of your day.

- 1) **Increasing work hours** — Work more hours, provided your billable time is efficient = ***Not ideal!!***
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- 3) **Improving workflows** — Optimize processes, delegate effectively, and use technology to handle routine tasks faster.

E. **Practice Suggestions** — Articles

- 1) [**AI and Emerging Technology Can Increase Law Practice Efficiencies**](#) — “To get started, you can start by mapping out your daily non-billable and billable tasks. The next step is to determine the technology and artificial intelligence (AI) tools that you can use to automate or decrease the amount of time spent on nonbillable tasks.”
- 2) [**Get a Free Check-up: Complete the Updated Law Firm Assessment**](#) — “The updated free self-assessment tool gives Wisconsin lawyers, especially those practicing in smaller firms, a meaningful way to improve their operations, manage risk, and increase client satisfaction.”
- 3) [**Five Tips to Excel as a New Lawyer**](#) — Ask questions, get out there and meet people, and know that everyone has had to learn their knowledge from someone else.

F. Remember...

- 1) *The Goal* is to map processes, identify where time is lost or efficiency can be improved, and establish a system for continuously improving the production line of services you provide.
- 2) *The Compound Effect* takes hold when efficiencies are gained — a few hours saved each week can compound over the year into much-needed vacation time or more time with family and friends.

IV. Avoid Burnout

A. Steps

- 1) **Step 1.** Complete steps 1–3 (managing billable hours, setting boundaries, and streamlining workflows to reduce stress).
- 2) **Step 2.** You cannot do this alone — you have a community of people here to support you.

B. **Support Network** – State Bar of Wisconsin

- 1) **Wisconsin Lawyer's Assistance Program** - The Lawyers Assistance Program offers confidential well-being support to the legal community. WisLAP staff are available for consultations, mental health trainings, and well-being presentations. Additionally, WisLAP trained volunteers are available for individualized peer-to-peer support upon request.
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- 3) **Ethics Counsel** – Contacting the ethics hotline at (608) 229-2017 or (800) 254-9154 for confidential guidance under Wisconsin Supreme Court rules.

C. **What's stopping you from using WisLAP or Practice411?**

- 1) **Ethics Counsel**
 - i. 3,807 calls to Ethics Counsel Hotline
 - ii. 76 CLE presentations
 - iii. 2 articles published in *Wisconsin Lawyer*
 - iv. 12 *Ethical Dilemmas* columns for *WisBar InsideTrack*
- 2) **WisLAP**
 - i. 1,100 attendances at WisLAP presentations
 - ii. 147 individual contacts
 - iii. 180 trained volunteers
- 3) **Practice411**
 - i. 1,238 attendees
 - ii. 438 individual consultations
 - iii. 822 e-list subscribers
 - iv. 19 presentations
- 4) Source: State Bar of Wisconsin, [2022 Annual Report to the Wisconsin Supreme Court](#).

D. Question and Reminder

- 1) **Why are attorneys more willing to call the Ethics hotline for help than reach out to Practice411 or WisLAP?**
- 2) **We do not have superpowers, and we are not superhuman.**

E. **Support Network – Professional**

- 1) **Office colleagues** – Trusted coworkers who understand the demands of your role and can provide guidance or just a sounding board. Consider [setting up a well-being program in your firm](#).
- 2) **Local county bar associations** – Opportunities for networking, mentorship, and education with fellow attorneys in your community.
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F. **Support Network – Personal**

- 1) **Churches or faith-based organizations** – Spiritual guidance, community support, and a sense of belonging outside of work.
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G. **Support Network – Licensed Therapists, Coaches, and Support Groups**

- 1) **Licensed mental health therapists** – Confidential, professional support for stress, burnout, anxiety, and other challenges.
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