



WSSFC 2025

Quality of Life/Ethics Track – Session 5

Streamlining Your Life & Practice to Reclaim Time

Presenter:

Fatimeh D. Pahlavan, Ogden Glazer + Schaefer, Chicago, IL

About the Presenter...

At Ogden Glazer + Schaefer, **Fatimeh Pahlavan's** draws from her background in cooperative governance, intellectual property, and nonprofit leadership to help clients build organizations that reflect their values. She approaches her work with a focus on clarity and collaboration, offering strategies that reflect each client's unique goals and context. A natural educator, Fatimeh's approach is grounded in curiosity and connection. She aims to make legal processes feel relevant and meaningful by tapping into everyday language and relatable ideas. Based in Chicago, Fatimeh views her legal practice as an extension of her belief in fostering spaces where both people and ideas can flourish. She is committed to supporting clients through every step of their work and regularly shares her expertise through workshops, mentorship, and community engagement.

Streamlining Your Life and Practice to Reclaim Your Time

2025 Wisconsin Solo and Small Firm Conference

Friday, October 17th at 10:10 AM - 11:00 AM

1. Begin with a humane premise

The goal is not to fit more into a crowded day. The goal is to preserve attention for the work that requires judgment. A good system is not punishment. It is care expressed as structure. When a practice runs on clear routines, lawyers spend less time context switching and more time deciding.

2. Who this is for, and what we are doing

This session is for solos and small-firm lawyers who wear the lawyer hat and the owner hat every day. The aim is not to sell tools. The aim is to help you practice at the top of your license by moving routine load out of your head and into systems you trust. AI will show up where it helps, but the topic is larger: humane structure, clear delegation, and simple technology that reduces drag.

3. Scope of this session

A good system protects attention for judgment. We design routines that lower stress, shorten re-orientation, and make outcomes repeatable. Productivity is a by-product. The goal is sleep-at-night confidence.

In this session, we focus on the foundations that keep a practice steady: externalizing memory, basic data hygiene, practical delegation, and simple rhythms for planning. You are not necessarily working faster. You are working with less drag.

4. Externalize memory

Your brain is a processor, not a database. Choose one reliable home for matter context and use it the same way every time.

You can do this manually, in a project management system, by creating one project per matter with a pinned “Matter Overview” task that holds five fixed fields (Background, Current posture, Deadlines, Risks, Next steps) and simple rules to auto-assign owners and due dates.

Or you can keep a one-page hub document in your matter folder and update that same file rather than spawning versions.

Or you can run a private AI thread per matter. Start with security. Pay for a private plan, either a general model with business or team controls or a legal-specific tool, so training on your data is turned off and retention is in your control. With that in place, you do not have to strip every detail, though you should still avoid unnecessary identifiers. Create one thread per matter and name it Client_Matter Description. When you return after a gap, ask the thread for a short summary with headings for Status, Open issues, Next three steps, and Information needed from client.

5. Data hygiene that you will keep

Order is a kindness to future you. 😊

One place per thing. Pick a single home for each category and stick to it. If something must live in two places, keep the file in one and put a link in the other. No duplicates, no side lists. This rule lowers the chance you miss a deadline because the note you needed was hiding in a different app.

Naming that pays dividends. Use a predictable pattern so files sort and search well: YY_MM_DD_Client_Matter_DocumentType.doc.

- Add short, standard suffixes only when needed: _Draft, _Signed, _Filed, _ExhibitA.
- Avoid “final_final.”
- Dates keep versions in order; client and matter make search unambiguous; document type tells you what you are opening before you click.
- Save a blank template of common names so you are not inventing them under pressure. AI can be helpful with this sort of task.

Two-click rule. Make daily tools reachable in two clicks. Pin your core folders in Quick Access or Finder Favorites. Bookmark the five pages you use every day on your browser bar. Pin your practice apps to the dock or taskbar and set their default start pages to the screens you actually need.

Weekly tidy. Schedule a standing 15-minute cleanup at the end of the week. Rename anything that missed the pattern. File stray docs from Downloads into the right matter folders. Archive completed tasks and close old loops in your matter hubs. Save key client emails to the document system and clear the inbox to a few actionable items. Small, routine maintenance prevents the big, disruptive cleanups that cost billable time and create risk in discovery.

6. Delegation

Delegation still applies when you are solo. You delegate to future you, to vendors, to contract lawyers, and to simple automations. The test is whether the next step can be made clear and repeatable. If yes, move it out of your head and into a system or a person who can carry it forward.

Follow the process you wrote. Culture begins with you. If you have a checklist, use it yourself. If you assign a task with a definition of done, review against that same definition. When you find a gap, fix the template or checklist so the next run is cleaner. Small improvements here remove rework and prevent silent drift.

7. Boundaries for difficult communications

Know who you will not work with. Write a short profile of red flags you will decline. Examples include chronic scope creep, disrespectful conduct, or timelines that would force unsafe work. Keep this list where you decide on new matters and read it before you say yes.

Set response norms. State realistic timelines in your engagement materials and in a brief auto-reply. For example: “I reply to new messages within one business day. Urgent items should be marked in the subject line. Court or deal deadlines always take priority.”

Draft in private first. For hard messages, never write directly in the client thread. Use a neutral drafting space. If you use AI, keep it private and configured for confidentiality, ask for two or three versions, then edit to your voice.

Create an escalation path. Decide in advance what you will do if a client remains upset after your best effort. Options include a short call with a clear agenda, a written change order, or a pause to reset expectations.

8. Where technology helps without taking over

Use the smallest useful tool. Start with your practice platform. Turn on matter notes, tasks, timers, and simple automations like calendar follow-ups and filing rules so routine steps happen without you. Add lightweight automations where they pay off: canned email responses for intake and status updates, short web forms that collect the same facts every time, and recurring checklists for openings and closings. Let AI act as scaffolding, not the decider. Keep one private thread per matter on a paid plan with training turned off. Use it to draft sensitive emails for you to edit, and clean up time entries to match your firm's rules. Keep a small community channel for peer consults. A group text or video note app is enough to get a quick gut or sanity check.

9. Hiring and the solo mindset

Think like a unit in a larger system, even if you are the entire firm. Write a one-page role scorecard before you hire or engage a contractor. List outcomes, core skills, and early signs of success. Follow with a 30-60-90 plan so expectations are visible on day one. Treat vendors like teammates. Give your bookkeeper, virtual assistant, and research service the same checklists and definitions of done you use internally.

10. A practical risk lens for operations

Keep ethics and exposure in view while you streamline. Use tools with privacy controls and avoid putting client identifiers into public systems unless your contract bars training and controls

retention. Apply a reasonableness test. If you would be uncomfortable explaining a method in court or to a client, do not use it. Adjust the workflow until you are comfortable.

11. Three concrete use cases that return time

- Design your calendar to protect focus. Hold two deep-work blocks per week.
- Group admin into short windows.
- Add buffers around high-stakes meetings for prep and debrief.

12. Bottom line

Design the day so attention flows where it belongs. Keep small structures you will actually use. Let technology draft the scaffolding while you keep the decisions. The result is steadiness, clarity, and a practice that is easier to run.