



WSSFC 2025

Quality of Life/Ethics Track – Session 1

How to Say No, and Actually Follow Through: Mastering Boundaries for Lawyers

Presenter:

Matt Shin, Sidebar Counseling LLC, Wausau

About the Presenter...

Matt Shin is a psychotherapist and a formerly practicing attorney operating Sidebar Counseling LLC out of Wausau, Wisconsin. Leveraging his past legal experience working in a variety of practice areas and settings along with evidence-based approaches to fostering wellness and functioning, Matt provides counseling and consulting services to individuals, teams, and broader organizations. In his previous life, Matt operated a solo intellectual property practice, was in-house counsel at Mars Wrigley Confectionery, and practiced patent prosecution and IP litigation at Foley & Lardner. He obtained his J.D. from Washington University in Saint Louis and a Master's in Counseling from Northwestern University.

How to Say No and Actually Follow Through: Mastering Boundaries for Lawyers

Session Overview: This continuing legal education session focuses on the critical skill of setting and maintaining professional boundaries. The presentation will cover practical strategies for saying no professionally, prioritizing self-care, and maintaining a sustainable and effective legal practice through effective boundary management.

Section 1: Why Boundaries Are Difficult for Lawyers

Learning Objectives:

- Understand the unique challenges lawyers face in setting boundaries
- Recognize how legal training impacts boundary-setting abilities
- Identify how fear affects boundary enforcement

Content Coverage:

- The role of fear in making boundary setting and enforcement difficult
 - How law school training emphasizes sacrifice to achieve results
 - Transition from structured academic environment to open-ended practice
 - Lack of built-in safeguards for mental and physical health in legal practice
 - The expectation to say "yes" for confidence, work accumulation, and practice growth
 - Why saying "no" feels alien, foreign, and scary to legal professionals
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Section 2: Understanding What Boundaries Actually Are

Learning Objectives:

- Define "boundary"
- Learn how boundaries improve professional reliability and consistency

Content Coverage:

- Consider boundaries as property rights, including the ability to exclude

- The need for maintenance and enforcement to prevent difficult situations
 - How boundaries improve reliability, consistency, and certainty in practice
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Section 3: Boundaries and Expectation Management

Learning Objectives:

- Understand the relationship between boundaries and expectations
- Recognize the role of communication in boundary setting

Content Coverage:

- Definition of expectations as rules of engagement with others
 - Recognition that both parties have their own separate expectations
 - The importance of maximizing overlap between different expectations
 - Poor communication as the primary cause of mismatched expectations
 - Boundaries as communication tools for expectation alignment
 - How boundary setting affects the ongoing evolution of expectations
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Section 4: Why Saying No Is So Difficult

Learning Objectives:

- Identify emotional barriers to saying no
- Understand business and reputational concerns that complicate boundary setting

Content Coverage:

- Emotional factors: guilt and responsibility for case outcomes and client well-being
 - People-pleasing tendencies and accommodating personalities in lawyers
 - Perfectionist beliefs about always being available, responsive, and helpful
 - Business concerns: fear of turning down work and losing referral relationships
 - Reputational concerns: maintaining image as competent and capable
 - Competitive field pressures and fear of being replaced
 - The illusion of control through constant availability
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Section 5: The Experience of Saying No vs. Receiving No

Learning Objectives:

- Understand the psychological burden of legal knowledge when declining requests
- Learn how to provide value while declining specific requests
- Recognize the different perspectives of those requesting and declining help

Content Coverage:

- The stress and anxiety of saying no when receiving requests for help
 - The burden of knowledge: understanding consequences, stakes, work droughts, overwhelm, and professional pressures
 - The experience of hearing "no" as rejection when seeking help
 - How underlying problems persist after receiving "no"
 - How each interaction shapes evolving expectations and boundaries
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Section 6: The Power and Importance of No

Learning Objectives:

- Understand "no" as an empowering and protective tool
- Learn how "no" creates opportunities for better alternatives
- Recognize "no" as the beginning of better solutions

Content Coverage:

- Problems created when "yes" hides deeper objections
 - False "yes" responses create anger, stress, and anxiety
 - "No" as a tool for control, autonomy, and maintaining status quo
 - "No" protects from decisions not in one's best interest
 - "No" as empowerment to establish wants and eliminate unwanted obligations
 - Creating pathways to proper "yes" responses through initial "no"
 - Using "no" to create space for consideration of alternatives
 - "No" as the beginning of better solutions and outcomes
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Section 7: Triaging Requests: A Decision Framework

Learning Objectives:

- Learn a systematic approach to evaluating requests
- Develop skills for emergency assessment and reality checking
- Understand priority-setting in the context of available resources

Content Coverage:

- Three-step decision analysis for incoming requests
 - Step 1: Emergency check - determining true urgency and priority needs
 - Step 2: Reality check - identifying distortions in perception of importance, recognizing unrealistic expectations and particular fears that distort judgment, objective assessment of circumstances and true priority level
 - Step 3: Priority assessment based on current capacity and available resources
 - Decision-making framework for responding to requests appropriately
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Section 8: Framework for Saying No Professionally

Learning Objectives:

- Master a three-step framework for declining requests professionally
- Learn to provide value while maintaining boundaries
- Develop skills for offering meaningful alternatives

Content Coverage:

- Three Step No:
 - Step 1: Acknowledging the outreach and demonstrating understanding
 - Step 2: Declining the specific request, making clear that the specific task, manner, or timing will not be done
 - Step 3: Offering alternatives that can still solve the requester's problem
 - Types of alternatives: future availability, referrals, self-help resources, problem reframing
 - Maintaining value provision while enforcing boundaries
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Section 9: Developing Scripts and Tools for Saying No

Learning Objectives:

- Create personalized scripts for various boundary-setting scenarios
- Learn to adapt responses based on urgency and relationship
- Develop systems for continuous improvement of boundary-setting skills

Content Coverage:

- Building a library of scripts for different people and situations
- Creating variations of the three-step framework
- Accounting for different urgency levels in script development

- Importance of updating and revising scripts based on experience
 - Learning from what works and what doesn't work effectively
 - Adapting scripts for new situations and challenges
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Section 10: Individual Capacity and Well-being

Learning Objectives:

- Recognize the myth of infinite capacity in legal practice
- Understand the risks of single-domain focus on legal work
- Learn strategies for sustainable practice management

Content Coverage:

- Debunking the myth of infinite capacity to handle unlimited work
 - How lawyers equate being busy with being worthy and valuable
 - The problem of being able to work anytime, anywhere through constant thinking
 - Resource depletion and its effects on efficiency, capability, and patience
 - Risks of focusing exclusively on occupational domain where there are multiple domains of functioning: physical health, emotional health, relationships, spirituality
 - Protecting overall well-being through diversified investment of time and energy
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Section 11: Strategies for Sustainable Practice

Learning Objectives:

- Learn domain time designation techniques
- Develop expectation-setting strategies for stakeholders
- Master the skill of saying no to oneself

Content Coverage:

- Designating domain time: specific blocks for full presence in assigned tasks, giving permission to oneself to be fully present in the task at hand
- Increasing certainty for stakeholders and oneself through clear communication
- Understanding personal productivity patterns and optimal working conditions
- Communicating needs and timing to eliminate guesswork by others
- Learning to say no to oneself using the three-step framework
- Acknowledging and validating personal needs while declining harmful behaviors
- Offering alternatives to oneself for achieving goals in healthier ways

Session Format: Individual presentation with interactive elements

Target Audience: Practicing attorneys, legal professionals, law students

Estimated Duration: 60 minutes

2025 Wisconsin Solo & Small Firm Conference

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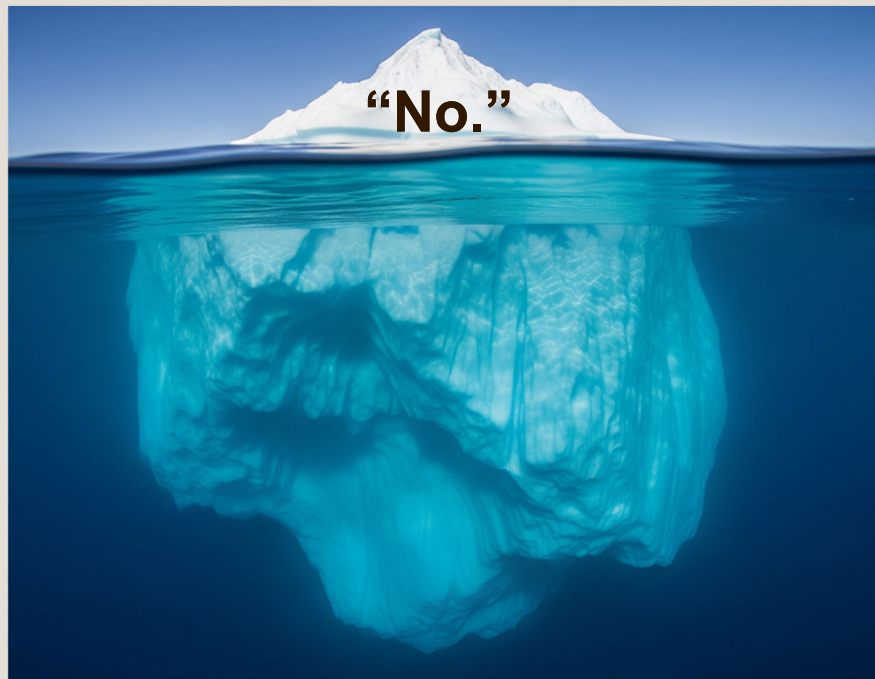
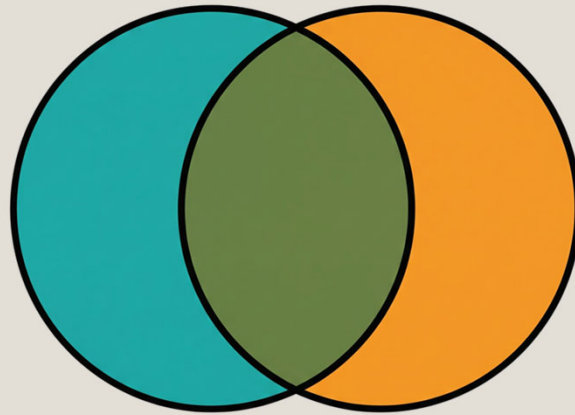
What is a boundary?



Why are boundaries so difficult?



Anatomy of an Expectation



What does “No” do for you?



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What does “No” do for them?



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First, can we say “No”?

Emergency Check

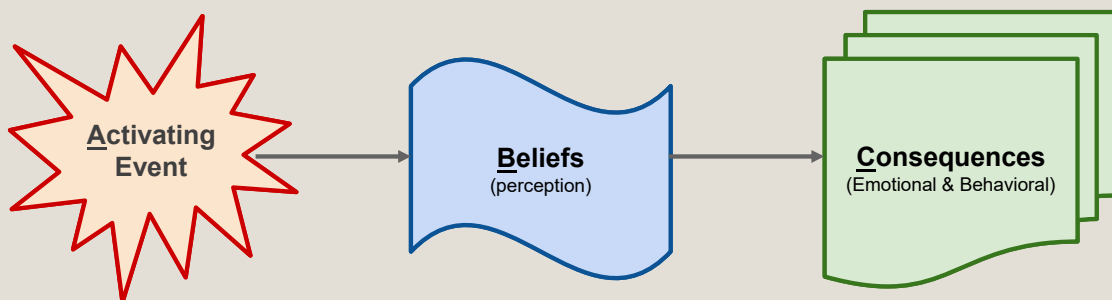
Reality Check

Priority Check

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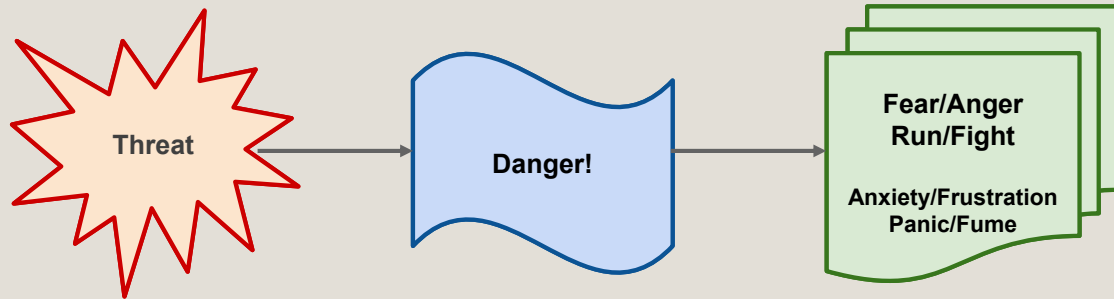
Reality Check

Albert Ellis’s ABC Model of Cognition



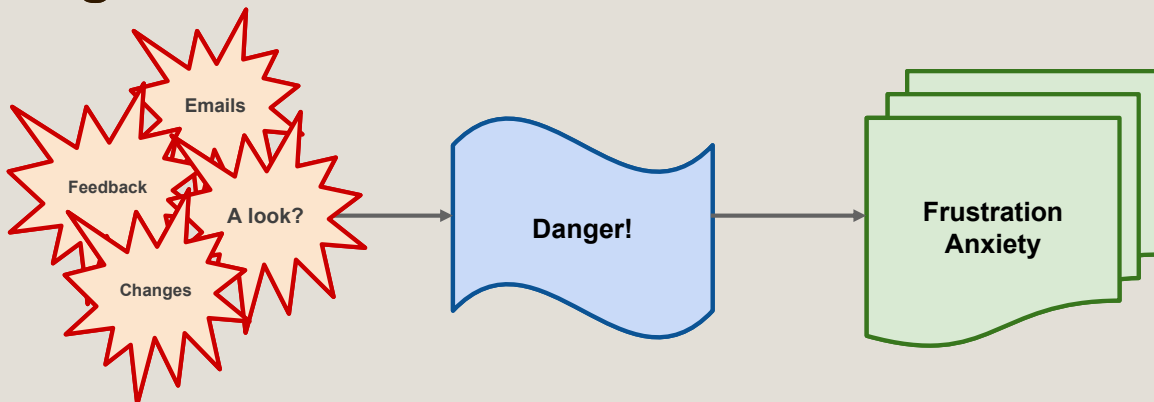
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Albert Ellis's ABC Model of Cognition



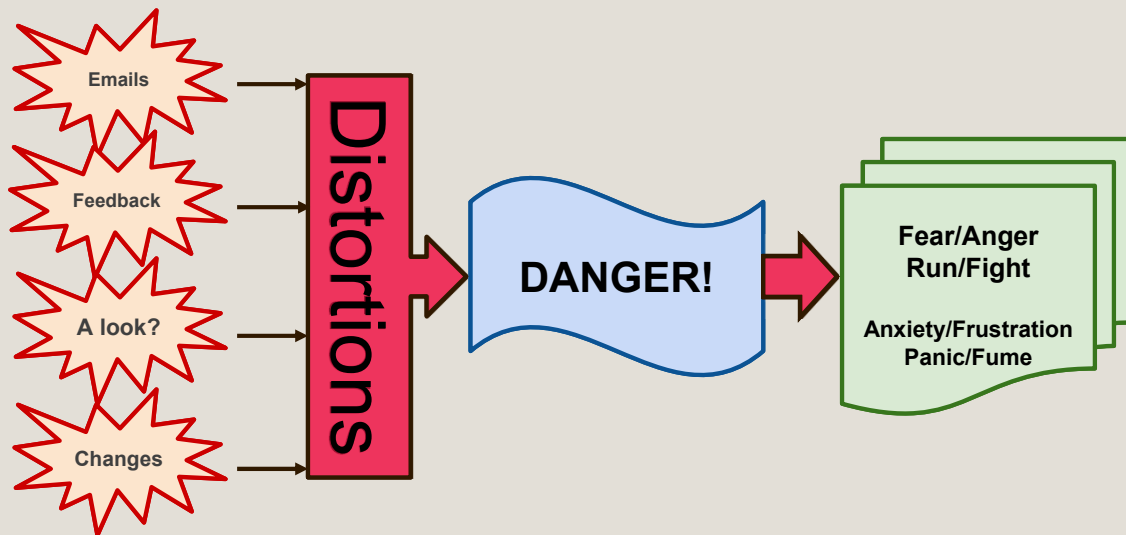
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Albert Ellis's ABC Model of Cognition



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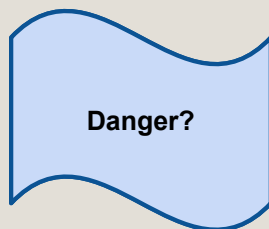
Cognitive Distortions



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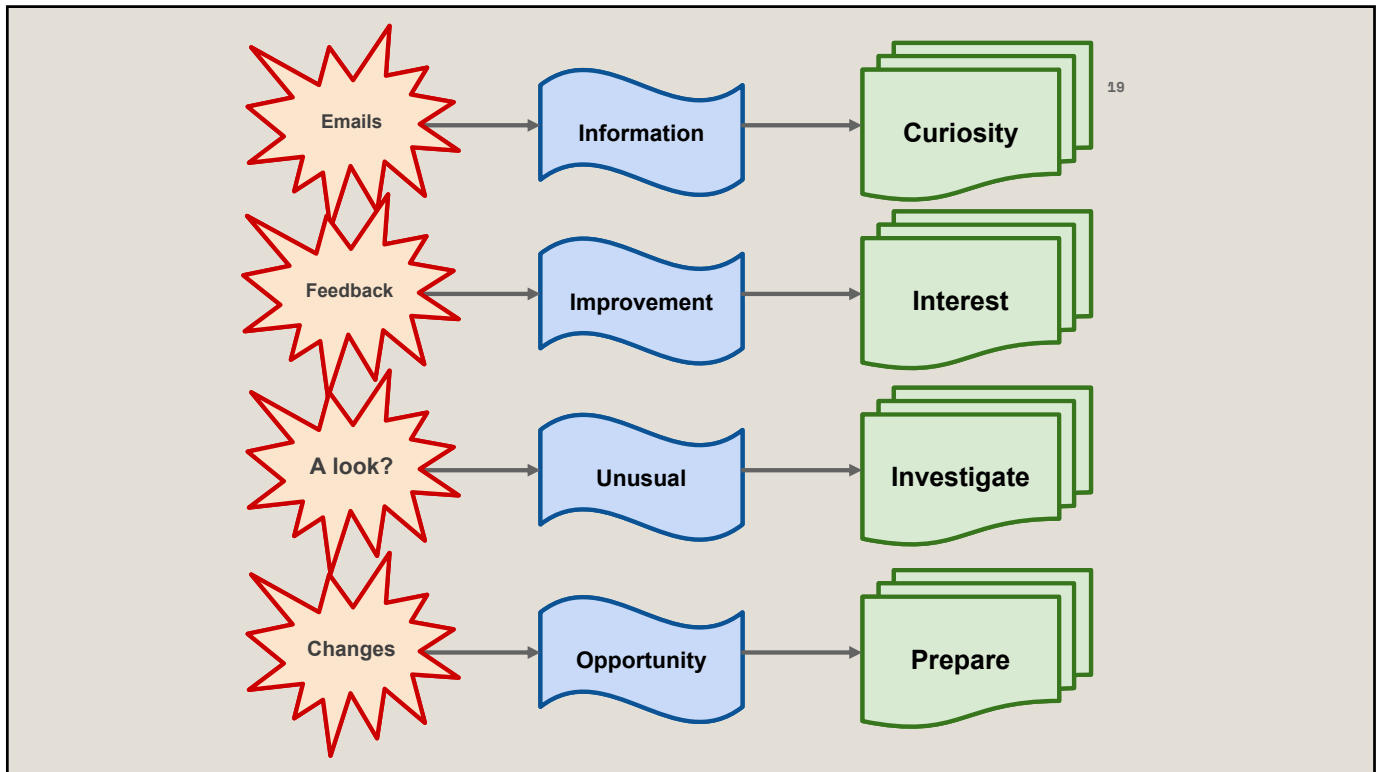
Challenge Your Distortions:

Interrogate Your Beliefs



- Are you **distorting** something?
- Is it really **a threat** to you?
- Is it worth **the cost** to you?
- Are you **concerned** about that?
- Do you **want to be** concerned about it?
- Is **the person you want to be** concerned about it?
- Is there **something you can do** about it right now?

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A red arrow pointing right, labeled "Priority Check", is positioned at the top of the slide.

A "No" Framework:

1. Acknowledge
2. Decline
3. Alternative

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Example Alternatives:

- Future Availability
- Referral
- Self-Help Guidance
- Reframe the Problem

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Example Script:

“Following up—what’s the status of [X]?”

“I know this is new for you and we’re at a stressful stage of things.

I don’t have access to my files and cannot offer a detailed update right now, but I know our next deadline is still a ways out.

I did notice that you’ve been checking in more often and I want to make sure you feel up to date. How would you feel about setting up monthly updates so I can provide you with updated information on a predictable schedule?”

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Example Script:

“I have a quick question – call me. ”

"Thank you for reaching out and I'm glad to help.

I'm currently managing several time-sensitive matters and am unable to give your question the attention it deserves at the moment.

I can schedule a call for [specific time], or if you'd prefer to email the details, I can often provide a written response within [timeframe]."

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Example Script:

“Urgent! [This] just happened.

What do I do?”

"I see your message marked urgent and I want to make sure it is timely addressed.

I'm in [meetings/court/focused work time] until [specific time] but will review your situation and respond by [specific timeframe].

If this is an emergency that cannot wait until then, please call my [colleague] at [number] and they will be able to assist."

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Scripts

- Keep 3-4 versions for different urgency levels
- Include your turnaround times with a buffer
- Update and revise as you go

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“No” is a complete sentence.

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The Myth of Capacity



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The Single-Identity Problem



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Build Resilience Through Multiple Life Domains

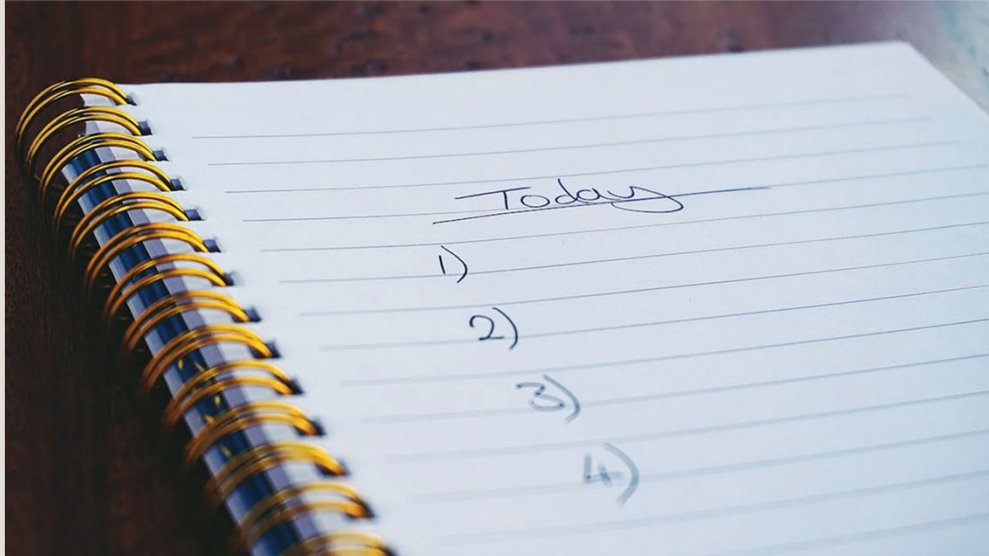


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Disconnection Strategies

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Designate Domain Time



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Set Expectations



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Say “No” to Yourself



“No” provides value.

“No” sets expectations.

“No” applies to self.

Reach out.

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