

Inside Out > column



By Christina Martini
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By David Susler
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How to stay on top of things

Here is a portion of the conversation. To learn more about this topic see the video at our website, chicagolawyer.com.

How do you describe your filing system for e-mails, paperwork, etc.?

Tina Martini: My filing system is a combination of electronic and paper folders. I have a high-volume practice and my assistant is invaluable in keeping me organized. E-mail folders are how I file the vast majority of my work. I organize the folders by client, and then sometimes create subfolders sorted by matter, depending on the volume. I do not file e-mails away until I have dealt with them or have delegated the matter to another person and calendared a follow-up reminder. If I am working on a file on my own, I generally only keep an electronic copy. However, there are many matters where I work with others at the firm and where the physical file is more important, especially if team members need to access a complete set of documents. Those are the occasions when I will ensure all electronic copies are printed and in the file.

David Susler: For e-mail, I primarily use my “inbox” and “sent” folders. I do have a few specific matter folders but not to the extent that Tina does. I organize my electronic documents in my computer in file folders according to operating company (op-co), with subfolders, based on the customer, vendor or adverse party, the nature of the matter and other subfolders within each of those by project or type as necessary.

For paperwork, I also organize into file folders similar to my computer filing system, based on op-co and matter. My assistant keeps paper copies of important documents and matters for the department, similarly organized by op-co and matter under each op-co.

How do you balance work coming from different bosses or different people claiming it’s the most important?

Martini: In my practice, I am working with different clients rather than bosses, all of whom give me very important projects and are equally deserving of high-quality legal services. You must strike a delicate balance to make them all feel that they are your most important client. To keep up with these demands, I find that there is a certain velocity with which I need to complete my work every day to keep clients happy and coming back, even if there are no specific deadlines per se.

I generally prioritize statutory/legal deadlines as well as client-imposed deadlines. I also consider whether there are other legal or business considerations as to why I should complete certain projects by a specific date/time, even if there is no firm deadline. For all other work, I follow a first in/first out schedule. Depending on the timing, volume and nature of the work, I will staff matters using various firm resources, both within and outside my practice group to ensure that the work gets done in a satisfactory and timely fashion. Being at a large firm makes it much easier to ensure sufficient and proper staffing of matters, especially when I am really busy.

Susler: I think “juggle” is probably a better word than “balance.” I generally follow the same prioritization principles that Tina just described, the biggest difference being that I work in a law department of three people (two lawyers, one assistant), so proper staffing typically means me, either on my own or with my general counsel. Some things are already of such an urgent nature when they walk in the door that you have to drop everything else and handle them right away. Such matters are typically evident by the context as well as the

direct instructions. Other matters may not be so obviously urgent, so you have to ask when your client needs the response. I like to ask my client’s expectation first and then determine whether I can satisfy that based on my current project queue. If I can’t, I ask them if a later date works. The key is communication, early and often. Clients are generally much more understanding regarding turn around time when you are honest up front and then keep them informed during the process.

What is your biggest pet peeve about disorganization or organization?

Martini: Disorganization can be counterproductive, even destructive. This is particularly true when working on a file with other team members who depend on having well-organized files to enable complete consideration and understanding of the matter and all documents relating thereto. If you do not know where your papers are, you cannot expect anyone else to either. Organization is mission critical. However, I have often seen how attorneys mistake being organized with being competent or knowledgeable. Just because you are organized does not mean you understand or have a good handle on the matter. Organization does not guarantee success — it is just one of the fundamental ingredients.

Susler: My pet peeve is that maintaining organization takes so much time and effort, but disorganization occurs so quickly without any effort. For example, in mid-April I became extremely busy with two matters that consumed nearly all of my attention for the next several weeks. When I looked up again at the close of those projects, I could no longer see my desk. Now I have to find an afternoon I can devote to cleaning it off again. ■

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