

THE PRODUCTIVITY

P1VOT

WORKSHEETS



VISION STATEMENT

If you have a clear vision of where you want to go in the future, you will not be distracted and derailed in your journey. Consider the following questions to help you craft your personal Vision Statement.

Describe your ideal life and career in five years. What will you have achieved? What metric(s) will you be using to measure success? How will life and work be different? The objective of this exercise is to envision and describe not only what you will have accomplished, but also who you will have become, over the next five years. Aim to complete this exercise in no more than four to five sentences.

Once you have completed this worksheet, keep it close by and review it so that you can evaluate whether your goal-setting and daily actions align with your long-term vision.



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SMART GOALS

Write down your one-year SMART goal below

Verify that your goal is SMART

Specific: *What exactly will you accomplish?*

Measurable: *How will you know when you have reached this goal? What do you need to measure?*

Attainable: *Is achieving this goal realistic given the effort and commitment required? Do you have the skills and resources necessary to achieve this goal? If not, how will you obtain them?*

Relevant: *Will achieving this goal help you move closer to your long-term vision?*

Time-bound: *When will you accomplish this goal?*



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WEEKLY PLANNER

With your SMART goals in mind, spend 15 minutes on Sunday evening mapping out what you will do this week to make forward progress. Deconstruct your goal into the specific business development action steps you will take for the next five business days. By designing your week, you will be less likely to procrastinate, and more likely to make a positive impact. Try to identify one task that you will work on each day that you can tackle within the one hour you sell yourself.

DAY	DESCRIBE TASK
MONDAY	
TUESDAY	
WEDNESDAY	
THURSDAY	
FRIDAY	



EISENHOWER MATRIX

Amid the fast pace of the practice of law, it can be hard to step back and assess the nature of the work you do. When stress is high, and deadlines are looming, everything feels equally urgent and important. But it's not.

The Eisenhower Matrix is a tool that can help you evaluate whether you're spending your finite time and attention on work that really matters. Use the Eisenhower Matrix below to categorize your work in each of the Eisenhower Matrix's four quadrants. By doing so, you'll get a handle on what you should be focused on, and what you can delegate to others and eliminate altogether.

	URGENT	NOT URGENT
IMPORTANT	QUADRANT 1 1. _____ 2. _____ 3. _____ 4. _____ 5. _____	QUADRANT 2 1. _____ 2. _____ 3. _____ 4. _____ 5. _____
NOT IMPORTANT	QUADRANT 3 1. _____ 2. _____ 3. _____ 4. _____ 5. _____	QUADRANT 4 1. _____ 2. _____ 3. _____ 4. _____ 5. _____



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DAILY TO-DO LIST

This Daily To-Do List template is based on the modified Ivy Lee Method described in chapter 6 of The Productivity Pivot. List the business development task you will be working on during the first hour of your day, followed by no more than five client work product tasks. Once your tasks are identified, block time on your calendar for each item.

DAY/DATE:

TOP PRIORITIES

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☐

CLIENT WORK PRODUCT

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☐

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☐

☐

OTHER TASKS

6

7

8

9

10

11

12

1

2

3

4

5

6

7

8
