

Thank you!

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Planning and Assessment Toolkit

Welcome to Michelle Dionne Thompson Coaching and Consulting!

Thanks for listening to me on your favorite podcast.

My work is designed to create sanity in the midst of insane industries, and one of the tools to make this happen is to plan, track, and assess to see what is working, what is not, change paths, or continue what you are doing.

You can use this booklet if you are any sort of writer, but it is geared towards academic writers.

It is divided into three sections:

- the first section is assessment or pulse taking.
- The second section is planning.
- The final section is tracking, particularly what you are writing. Print as many copies you need of the tracking journal, because you can use one every single time to sit down to write.

Let me know what works here, and what could be tweaked.

But most of all, this is the sort of tool that often works best with support to get you out of your way, and accountability to make sure you do what you set out to do.

I provide both for my clients and they have experienced success, including academic publication in journals and books by presses.

One way that you can learn even more about me and get more support about completing your assessment and planning toolkit is signing up for my newsletter.

http://eepurl.com/c9N4_v

Do not hesitate to connect with me if you need help.

Thanks for joining me on the podcast and I hope to hear from you again!



Michelle

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Pulse Taking – Lawyers

In addition to planning, it is important that we periodically assess what is going well about our work, and what we could dump. While some of the challenges you may face may seem hopeless, you can start generating ideas for shifting things. If you love that particular part of your job, you can start generating ideas for making it even better!

I recommend doing this sort of pulse-taking quarterly (every three months) and scheduling the time to do that. I would also recommend scheduling the steps for your improvements in your calendar.

- I. Client representation – Do you like your clients? Do you like the problems they bring that need solving?

- a. Generally Satisfying?

1 2 3 4 5 6 7 8 9 10

Not at all Satisfactory Highly Satisfying

- b. What makes it satisfying/not satisfying? _____

- c. How could it improve? _____

- d. What are three steps you could take to improve it? _____

- e. Do you need to think about how to get out of this part of your job and how would you do it? _____

II. Writing – You may not write a lot, but writing is a critical way that lawyers communicate. Could you use more support to convey what needs to happen in your work more effectively? Is this going relatively well?

a. Generally Satisfying?

1 2 3 4 5 6 7 8 9 10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? _____

c. How could it improve? _____

d. What are three steps you could take to improve it? _____

e. Do you need to think about how to get out of this part of your job and how would you do it? _____

Pulse-Taking



To See What Works and
What Doesn't

III. Continuing Legal Education - Yes, these are required to keep your license, but are they useful? Is there a different way to get the credit that you would find to be more beneficial? Do you need to start actually presenting regularly?

a. Generally Satisfying?

1 2 3 4 5 6 7 8 9 10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? _____

c. How could it improve? _____

d. What are three steps you could take to improve it? _____

e. Do you need to think about how to get out of this part of your job and how would you do it? _____

Pulse-Taking



To See What Works and
What Doesn't

IV. Administrative Work - If you do it yourself, do you like it? Could you shift it to someone else? Is it really in your wheelhouse of brilliance? If you have administrative help, do you like them? How is it going? How could it improve?

a. Generally Satisfying?

1 2 3 4 5 6 7 8 9 10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? _____

c. How could it improve? _____

d. What are three steps you could take to improve it? _____

e. Do you need to think about how to get out of this part of your job and how would you do it? _____

Pulse-Taking



To See What Works and
What Doesn't

V. Job Search – Are you thinking of starting one, in the midst of one? Do you know what you're looking for and what sort of situation you would find satisfying? Do you need to change fields?

a. Generally Satisfying?

1 2 3 4 5 6 7 8 9 10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? _____

c. How could it improve? _____

d. What are three steps you could take to improve it? _____

e. Do you need to think about how to get out of this part of your job and how would you do it? _____

Pulse-Taking



To See What Works and
What Doesn't

VI. Conferences – here is another way of staying up to date, not only with the profession, but also with the circumstances surrounding what you practice. It's also a great way to build the kinds of professional networks you may value.

a. Generally Satisfying?

1 2 3 4 5 6 7 8 9 10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? _____

c. How could it improve? _____

d. What are three steps you could take to improve it? _____

e. Do you need to think about how to get out of this part of your job and how would you do it? _____

Pulse-Taking



To See What Works and
What Doesn't

VII. Networking – This is an important way to make sure you have people who can help you stay current about your field, tell you job openings, present opportunities to actually lead the CLEs, etc.

a. Generally Satisfying?

1 2 3 4 5 6 7 8 9 10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? _____

c. How could it improve? _____

d. What are three steps you could take to improve it? _____

e. Do you need to think about how to get out of this part of your job and how would you do it? _____

Pulse-Taking



To See What Works and
What Doesn't

II. Support System - who's shoulder do you cry on? Who do you rant to? How do you manage the inevitable emotional ups and downs of your work? This is why you need to assess your support system.

a. Generally Satisfying?

1 2 3 4 5 6 7 8 9 10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? _____

c. How could it improve? _____

d. What are three steps you could take to improve it? _____

e. Do you need to think about how to get out of this part of your job and how would you do it? _____

Pulse-Taking



To See What Works and
What Doesn't

III. General Life Satisfaction – if your job is going swimmingly, but nothing else is, including your health and well-being, you need to take this seriously. And if everything is going well, note why.

VIII.

a. Generally Satisfying?

1 2 3 4 5 6 7 8 9 10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? _____

c. How could it improve? _____

d. What are three steps you could take to improve it? _____

e. Do you need to think about how to get out of this part of your job and how would you do it? _____

Of course, after you pulse-take, if you need assistance with anything, or you need to strategize, please set up some time with me. I'm happy to help you think it through. Contact me at michelle@michelledionnethompson.com.

Pulse-Taking



To See What Works and
What Doesn't

Planning – Lawyers

It is said that you must plan your work and work your plan. Indeed, you cannot arrive at your destination if you don't have a map to get there. Your plan is your map.

This doesn't mean that it's written in stone; however, it does mean you have a way there. You can adjust the route as necessary.

For this plan to work best, it has to be something that you generate. This worksheet looks at planning for the next three months. However, it may help you to think through where you want to be 10/20/25 years from now and direct your plan to that set of goals.

As a result, here are the areas you need to consider, add move if you would like, and make it work!

I. Client representation

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.

II. Writing

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.

Plan Your Work



And Work Your Plan

III. Continuing Legal Education

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.

Plan Your Work



And Work Your Plan

IV. Administrative Work

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.

Plan Your Work



And Work Your Plan

V. Job Search

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.

Plan Your Work



And Work Your Plan

VI. Conferences

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.

Plan Your Work



And Work Your Plan

VII. Networking

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.

Plan Your Work



And Work Your Plan

VIII. Support System

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.

Plan Your Work



And Work Your Plan

IX. General Life Satisfaction

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.	Three steps I can take to do this are (include due date in parentheses): 1. 2. 3.

The word planning may leave you feeling out of sorts. You can get help with this! Feel free to contact me at michelle@michelledionnethompson.com if you could use a hand.

Plan Your Work



And Work Your Plan