

The NLBM logo consists of the letters "NLBM" in a bold, white, sans-serif font, enclosed within a white rounded rectangular border.

**NLBM**<sup>®</sup>

**NEW LAW  
BUSINESS MODEL**

*The Money Map*  
**TIME BLOCKING TEMPLATE**

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An important note and disclaimer from Ali Katz: In this resource, we're giving you a snapshot of the time management system we teach our member lawyers in our Life & Legacy Planning curriculum that has been tested and proven time after time to help lawyers successfully overcome the time barrier and skyrocket the growth of their law practices.

We're giving you this resource as a way to start upleveling your time management skills, regardless if you join the NLBM program. But to achieve a significant level of growth like Kim Rockwood and our other members, we want to make it clear that you shouldn't rely on this PDF alone. You'll need the help of our other systems within the program such as our Life & Legacy Planning process and our Family Wealth Planning Session. If you'd like to learn more, then [schedule a call with one of our Law Business Advisors here](#) to see if our program is a good fit for you. Now, here's Kim Rockwood, who will walk you through this life-changing process.

## The Money Map Time Blocking Template

Welcome, fellow lawyer! I'm super excited to be giving you this step-by-step guide and worksheet for reclaiming control of your time. In this valuable resource I'll walk you through the same system that New Law Business Model taught me that helped me grow in 1 year from making only \$500 a month to consistently generating \$40k a month.

Let's start with a little background to set the stage.

Back in 2005 I started my own construction litigation law firm and was doing pretty well financially, generating \$700-800k per year. But it was a very chaotic and reactive environment, partly because of the nature of the work and partly because I didn't really know how to run a business.

Law school didn't teach me valuable life skills like how to run my own law practice—you can probably relate.

Then marriage struggles and divorce added to the mix and my children needed more support and I needed a more flexible schedule. So I switched to Estate Planning in an effort to free up time.



The non-reactive, transactional nature of estate planning immediately helped with regaining more control over my time. The practice area is also more enjoyable since clients aren't in distress (unlike practice areas like litigation, which is not enjoyable). Estate planning clients are more proactive, organized, love their families, and are fun to work with.

**But I still had a problem. I didn't know how to run a business or manage my time well.**

Searching for solutions online, I came across NLBM. I joined the program, but didn't fully commit to practicing what they taught.

And then I hit rock bottom. In April 2020 I only made \$500 during that entire month.

I jumped on a laser session with the founder of New Law Business Model, Ali Katz, who helped me:

- *Uncover mindset roadblocks and major productivity issues*
- *Realize I wasn't sharing with my coach and was missing opportunities for growth*
- *Open my eyes to my money mindset issues and fear of debt*
- *See I wasn't making the right business investments at the right time*
- *Come to terms with my fear of failure & what others thought of me, which was holding me back from marketing & putting myself out there*
- *Wake up to the reality that I wasn't effectively planning out my valuable time*



**That meeting with Ali was a pivotal moment for my life and law practice.**

It woke me up and I began fully committing myself to the program and to my NLBM coach's guidance.

As I mentioned above, time management was a huge problem for me at the time.

My coach helped me realize how important reclaiming control of my time was for my success, so I "took off" 2 whole days just to block out the next 12 months according to my business goals and lifestyle goals.

Fast forward to April of 2021 — I was consistently generating \$40k per month in my law practice.

And I'm going to show you the process I followed. But first, it's critical to understand what time blocking is and how to approach it.

## What is time blocking?

**1 | It's the intentional planning of how to safeguard your time (for both personal and work life).**

You start by blocking out how much time each week you want to spend with those you love, how much time you need for exercise, leisure, etc. And then you build your money generating activities around those in your work days. We'll show you exactly how to map out your days and weeks below.

**2 | But time blocking is not just the efficient organization of your time. It's also the process by which you are making yourself appear busy and by which you push yourself to grow.**

Now the truth of the matter is that you already are busy. But like many other lawyers before joining NLBM, you've probably set yourself up so that you don't look busy to the people you need to look busy to. And you look busy to the people you don't need to look busy to.

So who do you need to look busy to? You need to look busy to your prospects. If they call your office and they're able to set an appointment to come in and meet with you tomorrow—that doesn't look good.

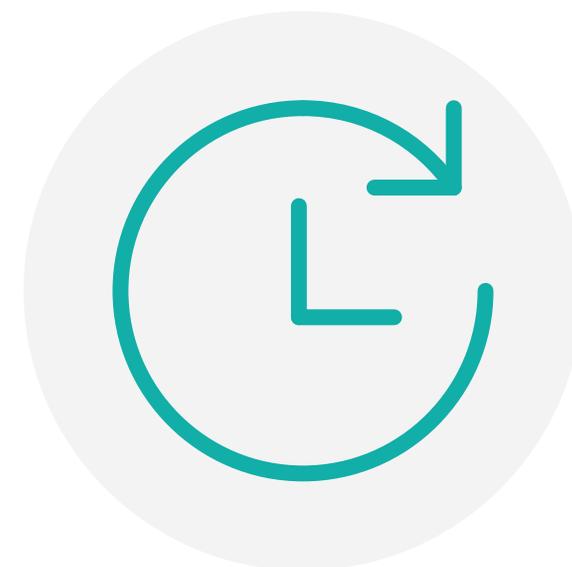
Time blocking begins by respecting your own valuable time so that others will respect and value it.

Also, when you begin to block off each chunk of time on your calendar it may feel at first like you're limiting your potential, but that's the mental hurdle that prevents so many lawyers from getting what they want.

I've been there before. And I've seen so many lawyers fall into this same trap. We create these ideas in our mind of how we think it should be and we continue down that path, but don't end up with the results we want. Instead, we need to step outside our comfort zone and do something completely different that doesn't feel intuitive if we wish to achieve better results.

If you want to have a bona fide business, you have to start being proactive/intentional with your time rather than being reactive and letting others dictate what you do.

**Now that we cleared that up, let's jump in.**



## Here's how to start reclaiming control of your time

*Note: how you spend your time is very integrated into the area of law that you practice, so I'll focus our conversation on Estate Planning since NLBM's proven model is built around the New Way to practice Estate Planning that brings you freedom, flexibility and fulfillment—not the boring way of Estate Planning you learned in your wills and trusts class.*

You first approach time blocking by **1)** designating a primary focus for each of your days, and then **2)** by breaking down the essential activities that make up the hours for each day. Here's my example:

**Sun/Sat** I set aside these days for self care, family time, community involvement, etc.

**Mon/Tues** I meet with new clients. If I'm not filled up with meetings yet, then I'm marketing to get more meetings with prospects.

**Wed/Thur** I do the client work. I conduct signing or strategy sessions, or I design/draft and review plans.

**Friday** is my day to work on the business. I don't do any client work on Fridays. I meet with my Client Services Director, I debrief all of her phone calls with her (who called, who made an appointment, who didn't and why, what to do differently next time). I have a meeting with my bookkeeper, write my newsletter, review metrics, and plan my marketing strategy. I work on my business—my most valuable asset. It's important to dedicate a whole day each week to working on your business.

### 1 | Here's how I outlined what each of my days is dedicated to:

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Self-care/Family	Client Meetings	Client Meetings	Work for Clients	Work for Clients	Work on the Biz	Self-care/Family

Now, it's your turn:

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY

2 | Then break down those categories into two types of activities: important time for self care/family as well as income-generating activities. Here's my example:

Self-care/Family	Work on the Biz	Work for Clients	Client Meetings	Daily/Other
<ul style="list-style-type: none"> <li>• Morning routine</li> <li>• Get ready/travel</li> <li>• Choir and church</li> <li>• Weekly chores</li> <li>• Rest</li> <li>• Walk dog</li> <li>• Hot bath/massage</li> <li>• Family time</li> <li>• Dinner out with spouse</li> <li>• Evening routine</li> </ul>	<ul style="list-style-type: none"> <li>• Financial + metrics review</li> <li>• Firm systems strategy &amp; implementation</li> <li>• Marketing strategy &amp; implementation</li> <li>• Weekly planning</li> <li>• Record/post Friday QA video</li> </ul>	<ul style="list-style-type: none"> <li>• Signing or strategy session</li> <li>• Design/draft review</li> </ul>	<ul style="list-style-type: none"> <li>• Client meeting</li> <li>• Marketing to fill empty meeting slots</li> </ul>	<ul style="list-style-type: none"> <li>• Reactive time</li> <li>• Creative time</li> <li>• Check bank and card balances</li> <li>• Social media engagement and outreach</li> </ul>

Now it's your turn:

# The Money Map Time Blocking Template



## 3 | Then, fill out your week and revise/improve as you go.

Don't worry about getting it perfect the first time. After the week is over, think of what adjustments you need to make. Since you're "in it" all the time this is one of the many places where having a coach is really valuable. My NLBM coach gave me a much-needed outside perspective and helped me fine-tune my time management as my practice grew.

Here's what my week looked like when I was generating \$40,000/mo. Notice how each day has a primary designation, but there's some flexibility. For example, it's important to build in smaller chunks of time for self care and family during the week as well.

	SUN 12	MON 13	TUE 14	WED 15	THU 16	FRI 17	SAT 18
GMT04							
5 AM							
6 AM		Walk Dog, 5:30am	Walk Dog, 5:30am	Walk Dog, 5:30am	Walk Dog, 5:30am	Walk Dog, 5:30am	
7 AM	Walk Dog, 6:30am	AM Routine 6 - 7am	AM Routine 6 - 7am	AM Routine 6 - 7am	AM Routine 6 - 7am	AM Routine 6 - 7am	Walk Dog, 6:30am
8 AM	Check Bank and Card Balances, 7am 7:15 - 8:15am	Get Ready & Travel 7 - 8:30am	Get Ready & Travel 7 - 8:30am	Get Ready & Travel 7 - 8:30am	Get Ready & Travel 7 - 8:30am	Get Ready & Travel 7 - 8:30am	AM Routine 7 - 8am
9 AM	Get Ready, 8:15am	SM Engagement/Outreach, 8:30am Check Bank and Card Balances, 8:30am Calls and Email, 9:30am	FWPS Slot 8:30 - 10:30am	SM Engagement/Outreach, 8:30am Check Bank and Card Balances, 8:30am Calls and Email, 9:30am	SM Engagement/Outreach, 8:30am Check Bank and Card Balances, 8:30am Calls and Email, 9:30am	SM Engagement/Outreach This time is for Check Bank and Card Balances, 8:30am Email, 9:30am	Call Mom 8 - 9am
10 AM	Travel, 9am	Staff Meeting, 9:30am		Staff Meeting, 9:30am	Staff Meeting, 9:30am		Check Bank and Card Balances, 9am
11 AM	Choir and Church 9:45am - 1pm Morningside Presbyterian Church	FWPS Slot 10am - 12pm	Calls and Email 10:30 - 11:30am	Write Friday QA & NL 10 - 11am	Record Friday QA, 10am Reactive Time 10:30 - 11:30am	Financial + Metrics Review (Important) 10 - 11am	Rest/Family Time 9:30 - 11:30am
12 PM		Reactive Block 12 - 1:30pm	FWPS Slot 11:30am - 1:30pm	Signing or Strategy Session 11am - 12pm	Signing or Strategy Session 11:30am - 12:30pm	Firm Systems Strategy & Implementation 11am - 12pm	Walk Dog, 11:30am
1 PM	Weekly Chores 1 - 2pm		Rest & Meditate or Walk, 12pm	Rest & Meditate or Walk, 12pm	Rest & Meditate or Walk, 12pm	Rest & Meditate or Walk, 12pm	Rest/Family 12 - 8pm
2 PM	Rest 2 - 4:30pm	FWPS Slot 1:30 - 3:30pm	EDU: EP Coaching Call 2 - 3:30pm	Signing or Strategy Session 12:30 - 1:30pm	Signing or Strategy Session 12:30 - 1:30pm	Marketing Strategy & Implementation 12:30 - 2pm	
3 PM				Design/Draft Review 1:30 - 3pm	Design/Draft Review 1:30 - 3pm	Weekly Planning 2 - 3pm	
4 PM		Reactive Block 3:30 - 4:30pm	Reactive Block 3:30 - 4:30pm	Reactive Block 3 - 4pm	Reactive Block 3 - 4:30pm	Massage 3 - 4:30pm	
5 PM	Walk Dog, 4:30pm	Travel Home, 4:30pm	SM Outreach, 4:30pm Check Bank and Card Balances, 4:45pm Travel Home, 5pm	(Important) Creative Time 4 - 5pm	EDU (LBSC Coach) 4:30 - 6pm Travel Time (Listed) 5 - 8pm	Travel Home 4:30 - 5:30pm	
6 PM	Hot Bath 5 - 6:30pm	Rest/Family 5 - 7pm	Family 5:30 - 8pm	Dinner Out with Jack 5 - 7:30pm		Family Pizza and Movie Night 5:30 - 10pm	
7 PM	Family 6:30 - 8pm						
8 PM		MCS Board Meeting 7 - 8pm		Choir 7:30 - 9pm Morningside Presbyterian Church			
9 PM	PM Routine 8 - 9pm	PM Routine 8 - 9pm	PM Routine 8 - 9pm		PM Routine 8 - 9pm		Take Jack to Dad's 8 - 9pm
10 PM							
11 PM							

# The Money Map Time Blocking Template



Now it's your turn:

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
5 AM							
6 AM							
7 AM							
8 AM							
9 AM							
10 AM							
11 AM							
12 PM							
1 PM							
2 PM							
3 PM							
4 PM							
5 PM							
6 PM							
7 PM							
8 PM							
9 PM							
10 PM							

The above 3 steps will help you reclaim control of your time regardless of your law practice area. But now let's take a look at how the NLBM program helped me grow my estate planning law practice with goal-based time blocking built on the foundation of their proven model.

## Goal-based Time Blocking

Goal-based time blocking is the next level of NLBM's time management strategy that is based on where you want to go in a given amount of time.

When you join the NLBM program your coach will walk you through how to apply this proven time management strategy to 1 of our 3 proven models. The 3 models help you calculate the frequency and ownership of activities per month in order to reach your goals.

Here are a few examples of how the cadence and ownership of specific income activities evolves from model to model:



### **Solo Practice**

- Block out 2-3 new Family Wealth Planning Sessions (FWPS) per week, max 8-10 per month
- Improve your engagement skills so you can get hired by more than 80% of those people
- Implement free marketing methods geared toward JUST filled those appointment slots
- You take home \$100k per year with some outsourced support



### **Staffed Practice**

- Block out 4 new FWPS per week, 12-15 per month
- Filling in the signings, binder delivery meetings, and client work around that, eventually outsourcing all of it
- Will be very busy if engaging 12-15 new clients /mo and don't have a full team yet
- Expand to 2.5 - 3 staff members
- You take home \$250k per year



### **7 Figure Firm**

- Block out 6 new FWPS per week (don't do this until you have a team to fulfill on that kind of client flow!)
- Hire "of counsel" attorneys to start taking those FWPS
- Focus your time working ON the business and educating your community so you can fill all those appointment slots
- Amplify the marketing methods that are working through paid advertising
- Firm generates \$1M+ and you take home \$350-450k

A lot of our members typically start at the Solo Practice Model and aim to transition to the Staffed Practice within 12 months time, and then the 7 Figure Firm Model 12-24 months after that. But each member chooses the model they wish to build and the timeline based on their life priorities. (For example, Member Lawyer Bethany Gilson grew from a Solo Practice to the Staffed Practice model, and decided to temporarily hold off on scaling further to the 7 Figure Firm so she could spend extra time with her newborn.)

In the NLBM program we also give you pre-built time blocking schedules for each of our 3 models that you can add to your calendar with one click and customize accordingly.



**Time Blocked Calendar for Solo Practice- SAMPLE**

  Add to download list

If you want to add this sample to your own calendar as a base for you to start blocking your own calendar click [here](#). Once clicked, you will see a pop up that prompts you to add a calendar. Please click "Add". Then, you will notice on the left hand side of your calendar it will appear under "Other Calendars" for you to refer to.

Please note: These calendars run on a 13-week rotation and must be customized weekly for your schedule in order to make the best use of them. Even when you are working with a set time blocking calendar, weekly responsive time management is needed.

[Click here for an iCal Link](#)

[Edit Calendar](#)

< June 2022 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat



If you'd love to learn our entire time-blocking system, based on our 3 proven models as well as the other systems that helped Kim Rockwood to grow her law practice (like how to conduct the Family Wealth Planning Session and engage 80+% of the clients who need your services at an average fee of \$4k-\$6k using the Family Wealth Planning Session & Life & Legacy Planning Program), then [book a call with a Law Business Advisor here](#) to learn more.