

**#146: Productivity, Hiring, and Operations
with Gretchen Nicolaysen of Springs Law Group**



Full Episode Transcript

**With Your Host
Melissa Shanahan**

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I'm Melissa Shanahan, and this is the *Velocity Work* podcast, episode number 146.

This podcast is for attorneys who are running their own firms. We explore tactics, tools, and stories related to pushing tasks and simply lawyering well and into building a successful firm. Working in your firm and working on your business are two very different things. This podcast focuses on the latter.

Melissa: All right. Welcome to the show everyone. I have a very special guest. She has a very special place in my heart. Welcome, Gretchen Nicolaysen.

Gretchen: Thanks, Melissa.

Melissa: I mean Gretchen doesn't even listen to podcasts.

Gretchen: I really don't. I feel really weird about being on a podcast.

Melissa: I know.

Gretchen: That I will never listen to.

Melissa: I know but thank you for coming on because... So Gretchen is essentially operations at Springs Law Group in Colorado Springs. So for those of you that listen to the podcast, Jake and Chris, who are the founders of that firm, they were on towards the beginning of the year in January at some point and sharing their experience and what their journey has been like. This firm has grown a lot, and they're growing really quickly. It was a great episode. Got a lot of good feedback.

Well, this is the person behind the scenes. This is the person who I mean truly, as amazing as founders typically are, just as Jake and Chris, as amazing as they are within their own roles and within their own rights, the firm would not be where it is without you in the seat that you've been sitting.

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You have been the person. In the past it's between them, in many cases, in most cases, and the rest of the team and all of the, like you're the ones with your hands in everything and making sure that things are going smoothly and on track, and etc., etc. They are a bit higher level with the work that they've been doing.

So I wanted to have you on because I think people are really curious. It would do a lot of good for them to hear the experience of what that seat is like and the lessons that you've had to face and learn over the years.

Even though you might not feel like you have advice to give, I do think that a lot of what you say today will be advice for people who either for law firm owners who have someone in that seat and so maybe they can impart some things. Or maybe there's someone in that seat that's actually going to be listening to this episode that this can bring some clarity to their role and how they work. So thanks so much.

Gretchen: Sure. Yeah. I really do hope like I do. Like you said, I don't feel like I have any advice to give. So I hope I can somehow be helpful to someone out there in the world that you know.

Melissa: Yeah.

Gretchen: Yeah, we'll see.

Melissa: Yeah, absolutely.

Gretchen: Yeah.

Melissa: Okay. Well, I met you guys about three years ago.

Gretchen: Yeah.

Melissa: Almost three years ago. You have been at the roots of every single quarterly retreat we've had from the get-go. From that very first one, you have been there. I always encourage people when they come to these

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retreats. This is for private client work, not necessarily the virtual stuff that I lead. That's not what we're talking about.

But for private clients, if we're going to get into a room for two days, there needs to be some sort of support there so that the founders or the founder isn't trying to go back and communicate to their team all the things that came out of that day or two days.

Gretchen: Yeah.

Melissa: So having the person who's really going to help you execute and you trust to be in conversation around business decisions, and you trust as a key team player. They should come with you, and sometimes more than one. Another way to think about this, for many of you listening, is your leadership team. Like your leadership team should be in the room. If you don't trust them with those kinds of conversations and being a part of those kinds of conversations, they probably shouldn't be on your leadership team.

So when I asked, you know, Jake and Chris, who's coming with you, it was you. I hadn't met you yet, but it was like Gretchen. Okay, awesome. So Gretchen shows up, and really quickly was clear to me how good you are in that role. Because not everybody is, right? Like they bring someone in and they're weak sauce, and you weren't that. So yeah. Do you want to describe what it was like back then for you? Even before you met me, around the time you met me. Just what was your work life like? What was your relationship to work like? Etc., etc.

Gretchen: So it's interesting. So at that point I had been at Springs Law Group just over six months, right? Am I doing the math right? Maybe it was a year?

Melissa: I don't know. I don't remember.

Gretchen: Okay I started, I know. I'm trying to like remember. So we started with you June of 2019.

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Melissa: Yeah.

Gretchen: Okay, so it was a year and a half in.

Melissa: Okay.

Gretchen: So I started with Springs Law Group in November of 2017. I mean full disclosure here; I'm married to Chris. Chris and I are married. We've known Jake since 2005. Like Jake really is like a brother to me, you know. Like he's, you know, we've just known each other. We've been through a lot of crap together. So we already kind of went into it with this tight-knit relationship.

So it was kind of a no-brainer, when they said, you know, when you asked them, "Hey should Gretchen come?" Like, well of course she should come because I'm Chris's wife and Jake's friend. Really, at that point, it was just the three of us building this firm.

Melissa: No you had somebody else I remember.

Gretchen: Oh, did we? We did. We did.

Melissa: Yeah you did. You did.

Gretchen: Well you're right, but for a long time, it was just the three of us. We did add the fourth person who is no longer with us. Yeah, she did not belong there. So I think I come from a unique perspective in the fact that I clearly have a vested interest in seeing Springs Law Group succeed. You know, like Springs Law Group makes money, my husband makes more money. In turn, I make more money.

So, you know, I do have a vested interest and a unique perspective, I think, when it comes to my role. So I was super excited to get to come to the retreat. Just everything we've discussed and everything we've learned. Yeah, I don't think. I think I went way off track. I don't even remember what your question.

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Melissa: Well, no, that's okay. I mean before we met because when we met, we created your accountability chart.

Gretchen: Yes.

Melissa: That can be really helpful because it kind of shows like, "Oh, this is my seat. These are my set of responsibilities."

Gretchen: Yeah.

Melissa: We all kind of know what we're supposed to be doing at work, but each of us has a bit of a different picture. So getting it into a chart can be helpful. So then you saw, at that point, where you sit and what your role is.

Gretchen: Yeah.

Melissa: Previous to that, you probably had a concept of what that was, but what was it like before that clarity was given? What was your relationship to SLG like? What was your role at SLG?

Gretchen: So at the time, we were doing both family law and personal injury. Chris was doing family law. Jake was doing personal injury. I was all over the place. Like I was doing paralegal work for both Chris and Jake. We were all over the place. So even having that org chart, to this day, is such a valuable tool.

So every single person. We started as the three of us. We're actually to 11 people right now in our firm. What's amazing is whenever any new person starts, that's the first thing we do is revisit that org chart. Because okay who's doing what? We print it up and give every single person in the firm a copy. So that way there are no questions who this person is, what their role is, what their job is. If you need something, where to go, all of that.

So even going back to June of 2019 and our very first org chart when there are only four of us, it's amazing just having the clarity, you know, because I would do what I was told. That's what I did, you know. If Chris needed

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something, he gave it to me. If Jake needed something, he gave it to me. If it's something that the other person could do, I would pass it on to them. So it was just so nice having the clarity. I feel like there should be a better word for it. But it just made everything more clear. Who's doing what and whose job it is to do what so that way I didn't feel like I had to do everything.

Melissa: Yeah, it was really clear to me that you were the glue behind a lot of what got done at the firm. Somebody's got to be that right? Like when things are lifting off the ground, that's got to be someone, and it was you. You were really good at it. Just by nature you're very organized. You care deeply about your work, about like what you produce. You're reliable. You have a good attitude.

Gretchen: I feel like I've asked you this before Melissa, but am I allowed to swear on this podcast?

Melissa: Sure. Yes.

Gretchen: Okay. So really, just like you said, I love getting shit done. I'm the queen of getting shit done. Like, you need something done, come to Gretchen. She will take care of it and get it done. It's not like, I don't need to be told every single step. If the first step doesn't work then I figure it out. What's the next step? If that doesn't work out, follow. I keep going until the result is there.

It is something that's just, I think, just an innate part of who I am. I love checking the box. I love getting shit done. So that's what I do. I spend all day. I mean, Chris will ask me at the end of my day, he's like, "Well, how was your day? What did you do?" I'm like I got shit done. That's what I did. Because that's what I do. So like it's all about just, you know, a lot of it's just tasks that need to be done and I get them done.

Melissa: Yeah. Which has also been a big reason, which we should probably get to this in a moment, but delegation has been really hard for you at points because you like getting stuff done. So it's really hard to just

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hand things. You have to figure out then what am I supposed to do if it isn't like crushing tasks?

Gretchen: Yeah. Because nobody can do it as fast as I can, as well as I can. That's what I tell myself is like sure, I can give it to someone else, but I will get it done faster. I will get it done better. Because I've been doing it for so long that, and it's just what I do. This is what I know. So, yeah. I do admittedly have a hard time delegating. Yes.

Melissa: Yeah, yeah. Yeah, we should touch on that actually in just a bit. Okay. So you are the person that gets shit done. Then when you come to the first retreat, we clarify roles. We clarify responsibilities. That probably was a bit of a superpower for you because the more clarity you have, the better you can crush your job, right.

But we come up with these goals and rocks every single quarter. For those of you who aren't familiar with those terms, if you're a newer listener, there is a podcast called Goals versus Rocks that you can listen to. But essentially, once you know what the goals are, which are number goals, then you decide what are you going to do in order to make sure you're on track for those goals? So what are you going to do this quarter that will have the biggest impact on hitting those goals? It's the effort involved. It's the behavior and effort involved.

So you guys pick these every quarter and have for nearly three years now. The truth is, and what I knew. So with private clients, I have a call every month with the founders or the founder, and have a call every month with operations lead, and there's a reason for that. Because the operations person is the one that is in charge of execution.

Though it doesn't always look like this, but especially back then and we're getting away from it now. We're moving in that direction. But you want to get to the place where the law firm owners don't have rocks. The team has rocks that are carrying out. At the moment, that isn't what has been happening, and we're getting there.

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So I need a point person on the team to be able to say, what's going on with these things? What's the status? What's the holdup? What are the interferences, etc.? So Gretchen was my person in that coaching relationship with Springs Law. You can always tell if you've got someone good in that seat for that meeting or not because the very first meeting will be on point. There's answers or there's not answers. Gretchen always has answers.

So I don't know if you want to share what you feel like your role has been as the firm has grown. There's so many things your hands are in. There's so many reasons why this firm is successful because of the seat that you sit in. But when it comes to rocks specifically or just the big priorities for the firm, how do you think about it? How do you stay organized around those? How do you always know we're on track or off track?

Gretchen: Well, we do a leadership meeting. So me, Chris, and Jake have a meeting once a week. that's something else that we never did before we started working with you. so that has been a huge help just in communication. You know it's so easy just to get so caught up in the day to day, and you forget to just talk to each other.

so we have a standing meeting Tuesdays at 1:30. If you ever call Springs Law Group on a Tuesday at 1:30, Chris, Jake, and I are in a meeting. so it kind of has become this habit and this thing that we just always do now.

But one of the things we always talk about in these meetings is a check-in. Like what are our rocks this quarter? Where are you guys at? What do you need? There's always a check-in in those meetings that we can all kind of keep each other accountable. Because I'm not going to babysit Chris and Jake to make sure they get their rocks done. so yeah, you know, I'm like you own a law firm like handle it. I have my own stuff I need to handle. You handle yours. I'll handle mine.

so it is a good way for the three of us to kind of hold each other accountable and be like okay, if you need something, that's the place. To

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get this rock done, I need \$700, or I need help from a staff member, or I need whatever. so it's just a good way for us to keep on top of it because it's so easy to get caught up in the day to day casework that you kind of forget that they're even there. So just us having those meetings. that's one of the things we automatically talk about in every meeting that helps us keep on track and get it done.

then we also, at least for me, it is too about just being intentional. Like okay, I know I have this thing, and I know I can't get it all done. I can't just sit down for an hour and complete my rock. That's not what rocks are.

so it is being intentional on blocking out time on the calendar for me to do the work for that rock, whatever it is, you know. You just really have to be intentional about it because it's not going to do itself. you have to make time for it. you can just get caught up in your everyday life if you don't make time. I mean, it's true of anything, but rocks especially. Like you have to make time for it.

Melissa: Just since we're on the topic of rocks. I'm putting you on the spot here, but what's one of the rocks that you're the most proud of?

Gretchen: So actually, like I know it's silly. I did this one. It was actually the first quarter of 2020.

Melissa: Okay.

Gretchen: So we had decided I was gonna do outreach to providers. I mean at this point we no longer do family law. We're strictly personal injury, which is just a huge blessing because family law is the worst. Kudos to all of you family law lawyers and practices that can do that because it is so hard. Anyway, so we do personal injury, strictly personal injury now.

so I was in charge of, I think I needed to go visit like 20. I wish I could remember how many providers I went and saw. So it was outreach to providers as potential referral partners.

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what I was able to do is I actually, it sounds so funny, but my dog groomer was, at the time, going to school for culinary arts. so what we did is we hired her instead of going to the nearest, you know, Nothing Bundt Cakes or corporate place to pick up cupcakes or whatever, she made some of the most beautiful desserts I have ever seen in my life. so she'd always make a couple extra for us, which was nice.

So I was able to kind of give her work, and we had had these amazing boxes of treats to go to these providers. so I was able to help her, and then she got to make these really cool things that I got to go take to these providers. But I love the outreach part too. I love talking to people, and just kind of letting them know who we are and what we do.

At the time, we were, I think, at our three year anniversary. We were about to do, we bought out a movie theater when Onward, that Pixar movie, was coming out. so, you know, obviously COVID was just starting. so I actually was like, everything shut down on my last week of that rock. So I wasn't technically able to complete it, which is fine. I'm not dwelling on that at all.

Melissa: I just remembered because we always make sure rocks are really specific. I wonder what the.

Gretchen: I think it was, like because I had two offices left to go visit. So basically, I blocked myself out once a week. I set it up with Cindy, my dog groomer cook extraordinaire. she would deliver stuff to the office on Wednesday mornings, and I would go sometime on Wednesday to go deliver them to these offices.

I had one week ago and two offices left, but everything shut down right then. so I was not technically able to complete it, but it was just a really great experience. Like I said, being able to help her, and then also just getting out and talking to people. It's just so refreshing to just get out of the office sometimes and talk to people.

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Melissa: And it builds the relationships that you do care about that matter to the business and yeah.

Gretchen: Yeah, yeah. We made a point of one of my approach to doing it was I would just show up at these offices, and be like, "Hey, we have clients that you've seen, and they've said nothing but great things about you. we just wanted to say thanks for taking good care of our clients. You may not know who we are yet, but here you go." so it just started a good dialogue by doing that. so, yeah. I think that, by far, has been my favorite rock out of all of them.

Melissa: Okay. Yeah, that's super good to know. In the operations seat, what's one of your biggest challenges that you maybe ongoing have experienced, but it's just part of the role and you figure it out, you navigate it, but it's the tougher piece of it all?

Gretchen: I think for me, it's time management and prioritizing things. Because I do. I get stuff from everywhere. I mean, Jake still comes into my office. My official role, I am the case manager, but I'm also the leads person. I train everybody. I do so many things still. So I think the hardest part of my job is kind of prioritizing my day, making sure I am getting done the biggest most important things. You know eating my frog and getting ugly things out of the way that I don't want.

I mean, there's no room for procrastination in my job. There just isn't. Because if I'm procrastinating then money's not coming in the door, and that is unacceptable. so it's go, go, go from the minute I get here to the minute I go home, which is I thrive on that. So that doesn't bother me.

But sometimes I'll seriously have four people come. Like there's a line outside my door of people waiting to come in and talk to me about something because they need something, and they need it in the next 10 minutes. Well, I can't always do that. I almost always can't do that. so it's got to be clear that yes, I'll get to it, but it's not going to be in the next 10 minutes. so.

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Melissa: Yeah.

Gretchen: You know having my hands in so many pots still, you know. I don't have just this one strict this is your lane. I'm still kind of all over the org chart.

Melissa: I don't have your, it's accountability chart.

Gretchen: Accountability chart. Org is easier.

Melissa: It's not the same thing, but it's totally fair. I know you what you mean. Everyone else knows what you mean. Because you're doing technically less than you were three years ago, but the business has grown so much that it hasn't really reduced. Like your bandwidth doesn't get to shrink, right?

Gretchen: No.

Melissa: Yeah. So I just want to make sure everybody understands that. Because when she's saying she has her hands in many pots, she does. Every quarter, they all look at this. They are all very aware of where Gretchen is sitting and where they are sitting, which I think we should also come back to. Some quarters, sometimes that's a hard conversation. We've had really hard conversations at the turn of the quarter, which is important and necessary.

So for everybody listening, it's like well it just sound her world has gotten crazier as the business has grown. It has, but there's a lot of things that she was doing that other people are doing now.

Gretchen: Yes.

Melissa: So your role has just expanded. You have delegated. You've hired people to take certain pieces of the job that you were doing three years ago. It's just a different shape now.

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Gretchen: Yes.

Melissa: Yeah. And by no means do I mean to convey that it's actually perfect right now. It's not. You guys are gonna keep working towards getting the roll to something that feels really good and really sustainable. it's just been an evolution.

Gretchen: Yeah. I think we're almost there, actually. Because, you know, we're actually in the process of hiring a case manager. We actually have an interview on Monday. So let's hope this goes well. then I can really just focus. So my focus then will just be. Well, I'm going to law school in the fall. So they have to find someone to replace me anyway. so my goal is actually.

Melissa: Wait, can we just stop for a second. So Gretchen just found out like what two days ago?

Gretchen: Yeah. Two days ago.

Melissa: Yeah. So yeah, congratulations.

Gretchen: Thank you.

Melissa: Yeah, you're gonna be an amazing lawyer and whatever you do, whether you come back and work with SLG or whether you do something entirely different. It's just man, what a gift to that industry.

Gretchen: Yeah, thank you. So then, again, the whole thing's gonna change because I don't expect that we can hire someone to sit in my seat and do everything that I'm doing. Because there's a lot, like I've actually. One thing we've decided to do is I started writing down everything I do. So that way we can actually define the case manager role, you know. Because I'm just kind of the do everything person. I don't do everything, but I do a little bit of everything, you know.

Melissa: Yeah. It's a role that you guys put in.

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Gretchen: Yes.

Melissa: Once you developed. So Springs Law developed pods to sort of split up and manage their clients so that they're doing really good job managing them. Then when you guys did that, it was I think we need. It may have taken a couple quarters to determine for sure, but you put a case manager over all of those pods, right?

Gretchen: Yeah.

Melissa: But then in each pod, there is an attorney and a paralegal, and someone else too? Or no, just the attorney and the paralegal?

Gretchen: Well, we do have a separate onboarding person that does all the intake and all the onboarding stuff. Yeah.

Melissa: So Gretchen's basically been over all that, but her name is also over.

Gretchen: So my name is also in the pod because I do the liens. I verify all the liens. So yeah. Then I'm also in the HR pod doing, you know, I do all the employee reviews. I do all of the provider outreach. I do all the, and actually that's changing too. We just hired a client happiness coordinator. She's taking over that. So we are starting to kind of narrow it down, which will be good for the person who takes over for me because, yeah. It is. It's a lot.

Melissa: Yeah. I guess the reason I just brought all that up. Actually, I'm super glad you just shared all that. I just remembered the reason I brought up that this case manager role is new. Like you're talking about writing down everything that you do.

Gretchen: Yeah.

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Melissa: There's so many responsibilities on your accountability chart, but that role is new enough that it's not baked out really on the chart. I mean there was like implied things.

Gretchen: Yeah. Yeah.

Melissa: But there's nothing explicitly stated like this then this then this then this then this. So it's good that you're doing that because you can transfer it all to the chart.

Gretchen: Yeah.

Melissa: Okay. So that's been one of the challenges is just juggling it all.

Gretchen: Yeah. Yeah.

Melissa: That's so funny. You're so good at it. I'm surprised that's what you say because you're just so good at it to me. It's like yeah, it's challenging.

Gretchen: Well, it's not that it's like. I mean it's challenging the fact that it's just exhausting sometimes. You know what I mean? Sometimes I just think it would be so nice just to come in and just do liens and go home, you know. Or just come in and not just be a paralegal, but just focus on these hundred cases and then go home, you know. So, yeah. It's just sometimes it just gets tiring. It ebbs and flows everything. So I think that's why, I'm in a tired point right now. So maybe that's why it's the most challenging part of my job. Yeah.

Melissa: Yeah. Okay. Yeah, that makes sense. Okay. Tell me when you think back over the last, just since I've known you. The reason I'm using that as benchmark is because that's when there was clarity about like oh, this is what we're doing. This is what we're shooting for, X, Y, and Z. What do you think, as a one off, something you had to get through and maybe as a team, but what stands out to you from your seat and your role in it. What was probably one of the biggest challenges that you can recall that you've had to deal with?

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Gretchen: So, and I think this actually is like my own, it's my own neuroses is what it is. It's not necessarily... It was two things, actually, because one of our core values is being open and honest. So I would say one of the biggest things that can just help a business grow is just open and honest communication. All the way up, all the way down from the owners to the receptionist. You have to have hard conversations.

So at the beginning, that was very hard for me because I'm such a nice person. I want everyone to like me, and you know all that. So it took certainly overtime and the more hard conversations we've had, the better we've all gotten at it. Because I, you know, actually had to sit down with someone the other day and just kind of explain, "Hey, this isn't going well. We need to get this tightened up." She's a new employee. "Like we love having you here, but we have to tighten this up. If I don't tell you this, then you're never going to know."

Melissa: I'm so proud of you.

Gretchen: So we have to have these conversations. So now I'm just like, I don't waste any time. I'm just like if there's a problem, we need to discuss it, and we need to discuss it now. Because the leadership team complaining about it doesn't do any good at all. It does zero good. You have to have a conversation with the person it involves. Even though it's hard, you have to have those conversations. Because if you don't, they'll never know they're messing up. How are they going to know if you don't tell them?

Melissa: I didn't mean to say I'm so proud of you like a mom though. But you are, you're right. You are extremely kind, and you care deeply about people. Do you think it is fair to say that your tendency is to be non-confrontational?

Gretchen: When it's personal, yes. Like I'll debate politics with anybody any day. I'm all about having, like I don't fear conflict necessarily, but when it's personal. When I'm telling someone, hey you're not doing this very well knowing how that can come across, I think that's a whole different level of

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confrontation. That is hard. I don't know anybody that loves doing that. I don't know anybody that, it's a hard thing to do.

Melissa: I mean I was just listening. I hope you do listen to this because what the reason I said I'm so proud of you is because you said, "If something doesn't go right, I just as soon as we can I sit down and I say, hey, this is what's going on. We need to fix this. We need to tighten this up. This isn't okay." The Gretchen that I knew when I first met you would be like, "Oh shit. Like what is."

Gretchen: Uh-huh. Yeah.

Melissa: Now this is just who you are. This is what you do.

Gretchen: Yes.

Melissa: Yeah.

Gretchen: Because I see the value in it, you know what I mean? I'm bought into it because I've seen what a difference it's made for our firm.

Melissa: Yeah.

Gretchen: So you just bite the bullet and just do it.

Melissa: Yeah. Yeah. Okay. What's the second thing? You said there was two things.

Gretchen: So, and maybe this is just something just because of my relationship with Chris and Jake. You know, obviously. So I have this, again, my own neuroses of being the boss's wife. I have struggled with that.

Melissa: Yeah. Yeah.

Gretchen: For so long, and clearly it just, you know, it just gets to me because I don't ever want to be any staff member ever to look at me and

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think in their heads, "They're here because she's Chris's wife." I'm here because I deserve to be here and because I work my ass off. I really don't think any of our staff thinks that. So that's the funny part about it. Is it literally is my paranoia, yeah.

Melissa: The language that you just used was I struggle, or it's a struggle. It isn't a struggle. Like no one, you are correct. No one thinks that.

Gretchen: Yes. It's all made up in my head. Yes.

Melissa: Yeah. It totally is. So you and I have air quotes around you being a boss's wife isn't a struggle. Like it's just your fear of coming across that way is what gets to you.

Gretchen: Absolutely.

Melissa: So you mitigate against that as hard as you can.

Gretchen: Oh, absolutely. Nobody probably cares or even notices or whatever, but it makes me feel better knowing that I work hard for this firm. It's not totally because I'm Chris's wife. It's because I'm a hard worker, and that's just what I do. Every job I've ever worked at, that's what I do.

So that's why it's funny because when I decided to go to law school, that's when I was like I'm tired. I don't want to be the boss's wife. I want to be the goddamn boss. So that's just when, I actually put that in my personal statement through the law schools. It's like I don't want to be the boss's wife anymore. It's time for me to step up and be the boss and level up.

Melissa: So good. What is something that, all this stuff, guys, by the way is I'm just throwing it at Gretchen. I didn't give her these questions beforehand. So if you don't have an answer, we could just move on to the next question. What is something that in your seat as you've been managing people. And as you've grown, you've arguably been the heaviest manager, meaning you've had the most people underneath you. What has

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been a tool or a tactic that you found helpful as you've grown in that role to be better at that? To better at managing?

Gretchen: Well, I think it is just having a good system in place for training. Having good systems in general because it's a good thing to fall back on. Like hey, this isn't Gretchen's rule. This is Springs Law Group rule, you know what I mean? We have all of our systems in Tetra, and this is how we do it at Springs Law Group. There's no room for any new attorneys or any new paralegals view... I guess, we're open to, and it changes all the time. Our systems change. Absolutely. As we've grown, as we've learned a lot, and they have changed over time.

But when that happens. I mean literally yesterday, Jake and me and two of the paralegals had a redaction training because we have a new paralegal, and we want to make sure everyone's doing it the same. That all of our demand packages look the same.

So just having the systems in place so that way as more and more people come on, even the other paralegals can say, "No, this is how we do it at Springs Law Group. This is what our demand packages look. These are the things we're redacting out of our medical records you know." So that way it's just clear. We just need clarity and, and so that way no one's guessing what their job is and what they're supposed to be doing and what is supposed to look like.

Melissa: That's so good. I mean, yeah. It's funny. This can be common, but when I first met you guys, a lot of your rocks were run systems and processes. Then you kind of get to some stability with that, and your rocks shift. It's not really about that anymore. It's about other things that are meaningful to the growth at that point because you did that. Not that they don't need tweaked, to your point.

Gretchen: Yeah.

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Melissa: But they always need updated and changed, etc. Can you talk a little bit about your systems? The way that it is set up for you. So you said you're in Tetra. That's where they all live. Part of my curiosity is, can you think of a system that once you got it in place allowed you guys to put your foot on the gas in a way that you couldn't before? Or experienced ease and flow that you just couldn't before you had that done?

Gretchen: You know, I don't know that it's one specific system. I think it was taking that time. I mean like rocks that are around systems are boring, and they're not fun. They just aren't, but they have to get done. Just you saying that, like we haven't had one of those for a little while. It just reminded me how nice it is that we don't have to do that.

Well, I mean, it's not that we're not still working on our systems. But it's not the central focus because we've done the bulk of the work. So I think honestly, just doing all of it, you know. There's not just one system that's it's just like flipped this switch, and it was smooth sailing. I don't think that exists. I think that's fairyland, you know. But I think.

Melissa: That's a good point.

Gretchen: I think doing the bulk of that work and spending a year and a half on those rocks and doing all of that, it leaves such a great foundation for everything that came after it.

Melissa: I was just thinking back to do you remember some of the systems and processes that you guys had as rocks?

Gretchen: Oh, yeah.

Melissa: Okay, what were they? Because you were just saying the heavy lifting. Because it was going from no system to a system. You don't really have many places in the firm don't have a system now. So going from zero to one with systems processes. What were some of those?

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Gretchen: So, I mean, we started at the beginning of a personal injury case, and we did a system for everything along the way. So we did, you know, answering the phone. We did if a client shows up at the door. We did a system for sending out letters of representation. We did requesting policy limits from insurance companies. I mean, really, we've done lien systems. We've done, like Jake started a litigation system. We have an onboarding system, both for new clients and for new employees, new staff. We have systems for really just about, sending out emails.

I mean, we literally started at the beginning and wrote down everything we did in a day and made a system for it. Because that's what everyone's doing. We do the same things every single day. It's made such a difference. We have, able to put links in Tetra so you can actually link to the actual LOR you want send out. We've done videos in Tetra. You can do so much with Tetra so that way you're covering all your bases on, you know, especially with new staff. Whatever their learning style is whether it's visual audio, whatever. So, we kind of have all of our bases covered that way too with the videos that we can add in there.

Melissa: Mm-hmm. For everybody listening who feels like, "Oh man, I have so many systems I need to put in place still." They really did chip away at this quarter by quarter. I think it can be paralyzing when you think about all of the things that you need, all of the systems and processes that you know you need. It can feel I don't even know where to start. Then you get busy, and you don't start. But that was part of every quarter. What are the systems or processes that are most important? That will have the most impact.

Gretchen: Yeah.

Melissa: Let's start there, and then you just kept chipping away.

Gretchen: Mm-hmm. Yeah. It goes back to being intentional about it. again, you're not going to sit down and write down all your systems in one day in one sitting. That doesn't happen. So it is just making the conscious choice

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to be intentional about it and setting up. If you spend one hour a week doing systems, you know, I mean at the end of the quarter, you spent 12 hours getting systems in.

You can get, like especially the easy ones. Like sending out a letter of representation. It'll take you 15 minutes to write that system, if that. So if you can get two or three done in an hour, by the time the end of the quarter rolls around, you've got 20 to 30 systems done. So it's the whole how do you eat an elephant? One bite at a time, you know. So you just have to make the decision and be intentional about it, and just decide to get the done.

Melissa: Yeah, yeah. Another question. When you look back over the journey, really being in the operation seat, which I don't even know what we... What is your role?

Gretchen: My card says case manager. My business card says case manager.

Melissa: But that's new. What was it right before the case manager, which is fine.

Gretchen: Oh it was office manager. They just had me as office manager.

Melissa: Yeah. Oh my gosh, I don't think I knew that.

Gretchen: Yeah.

Melissa: That's the worst. The worst. Anyone out there who has office managers, don't have an office manager. Because it's the catch all, and lucky that you guys made the decisions to get really organized around this stuff. It was very clear what your responsibilities and roles are, but typically if you have an office manager, and that's what you call them, it's just a hot mess of a job that somebody's supposed to take. There isn't clarity. There's no written roles and responsibilities.

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So pick a different word. What is their role? It's not to manage the office. It's either to manage a team of people or I don't know, but it's a bad term. If I knew that, I would have asked to change your business cards.

Anyway, okay so as you started in that role. I call it operations because it is what you're doing. You are my point person for operations inside of your firm. You always know the nuts and bolts, the ins, the outs, the deadlines, the people, all of it. So you are operations to me. So from that seat, what has been one of the most fun and/or exciting pieces of being a part of this firm, this team, this journey? Especially within the seat that you have.

Gretchen: You know, I think my favorite part is really just seeing the growth, you know. Like really knowing where we started when it was me, Chris, and Jake, and that was it. I actually came from a dental background. I was the office manager of a dental office before I started with Chris and Jake. So it was all brand new to me. The law, all of it. So I was like drinking from a firehose, and it was not pretty.

So to know that we started doing family law, and Chris was doing estate planning. We were just kind of all like, so knowing where we started and where we are now and where we're going. It's so exciting. It is so exciting to see. I don't know if that's me as an operations manager or me as Chris's wife and Jake's friend, or what. But it is exciting to just kind of see our potential, you know.

We have so much potential. We have things set up and organized in a way that we are built for growth. It's exciting when it actually happens. Yeah, I don't know. It's fun to watch. Because I get to keep track of everything Airtable too. So I'm the one that tracks all of our new clients, our closed cases, our case value, all of that. So I see all of it. So I love the potential excitement around where we're gonna end up. Who knows where we're gonna end up, but we're certainly just headed in a great direction.

Melissa: Oh yeah. 100%. Yeah, I'm so glad you said that. So the operations point person, for me, it always is the one who's responsible for

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making sure that the data gets entered into their table. For private clients, we build a table, a data table, that tracks a lot of the things. At this point, you guys, there's certain other things you're tracking that aren't in that, but that's where the cases are. That's where the revenue is. That's where we can calculate a bunch of things.

So Gretchen goes in every Friday and adds. The way that their table is set up, because this isn't the case for everyone, she can go in weekly and add updates. In some firms it's just monthly. But yeah, that's Gretchen. It's all Gretchen. Then all three of you can look at that data at any point, but you're the one that goes in to enter it.

Gretchen: Yeah.

Melissa: Yeah. And you automated a lot of that now so that you don't have to manually enter it. There's a lot of automations. You guys hired Kelsey Bratcher.

Gretchen: Yes, oh my gosh. It's so great. I mean, a new client signs up, they automatically go into Airtable. I'll go in and assign a pod. I'll track who referred them to us, like how they found us. So I put that information in. Then when we close out cases, I'll put in all the case values and it's cost and all that.

Melissa: Which takes you, I think a lot of people get really weird about having to manually enter things. But how many minutes do you spend every week in Airtable?

Gretchen: Oh maybe 15?

Melissa: Yeah.

Gretchen: Not that much. It takes like.

Melissa: Before Kelsey, what'd you spend?

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Gretchen: Oh but even then, all that goes in there from Kelsey is just the client's name.

Melissa: Okay.

Gretchen: The brand new client. They just get added onto the bottom of the list.

Melissa: Okay.

Gretchen: But really, it just takes a few minutes just to add in the additional information. Then when the case is closed, the attorney sends me all of the data for it. Then it literally takes 10 seconds to put it in there.

Melissa: Yeah. So her columns, which I mean, you are in this more than I am. But are basically the name and of course the pod, the responsible attorney, the open date, the start month and close month, and then the start date close date for different reasons because we can pull different calculations from both of those fields. Then the case value. Oh you, we actually do.

Gretchen: Well, it calculates it itself.

Melissa: It calculates the case value?

Gretchen: Well the average case value, yes. So I put it.

Melissa: The average case value.

Gretchen: Yes. I'll put in the actual, what we settled the case for, and then, you know. But that's what I always look at is yeah.

Melissa: You put in case costs plus you put in the total amount that came in.

Gretchen: Yes. The total settlement. Then the case fee is calculated by subtracting out the costs. So anyway, it's like each record is its own line.

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Then from there, we can pull averages. We can take a look at pod averages if we want to, which is something we'll probably start doing. So there's a big, source of truth is what we call it.

Melissa: Yeah. Well.

Gretchen: It's like that data table is source of truth.

Melissa: Yes.

Gretchen: To throw a Melissa Shanahan at you, we use it all the time because it's facts, not feelings. That is a table full of facts. If we feel like this month isn't going well, we can go look at Airtable and be like, "Oh, wait. We have 15 new clients this month. What are we freaking out about?" You know.

Melissa: Yeah.

Gretchen: So oh, we feel like our revenue isn't as high as it should be? Because I actually looked at it the other day, and I Slacked Chris and Jake about it. I said do you realize that we're 80 grand higher this year already than we were by the end of the first quarter of last year? So like, yeah. I mean it's just good to notice those things. If you're not tracking it, how would you ever know? Because then you feel like it wasn't it, but no. We pull it out all the time. Melissa says it all the time. Facts, not feelings. Yeah we use it because it's true.

Melissa: It serves you when things are down. It's the truth. So looking at it instead of, because there's times where one way or the other. Sometimes you feel like you're doing great, and you look and like it's oh wait a minute. We need to get, what can we do to get serious? What can we do to help this as much as possible? We're off track. But yeah. It's just either way. Most of the time, though.

Gretchen: Yeah.

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Melissa: This is true for most firms. Most of the time. Once you start, you have the ability to get data, and you can put it in a place. Most of the time people underestimate their progress, and that is a really good table to look at so that you can figure out.

Gretchen: Yeah.

Melissa: Like oh, no. Okay. We're making really good progress. Do you guys look at it together at your leadership meetings?

Gretchen: Not very often, but all three of us look at it regularly. So we're usually able to speak to it. We all like oh yeah. We don't have to go look at it to verify the numbers. We're all just kind of on it.

Melissa: Yeah. What are you most excited about for your upcoming retreat? It's just in a couple weeks.

Gretchen: I'm excited. I don't know. I always get really nervous, actually, before a retreat.

Melissa: You do.

Gretchen: Because I just don't ever know like.

Melissa: Tell people why you get nervous, and just what the experience is before, during, after.

Gretchen: So, okay, I think what actually makes me nervous is I don't know what to expect. I mean, okay. Just in the sense of like, the retreat's the same every time, but different shit comes out every time we're together. There's different shit that the three of us will talk about because Melissa's there to be a moderator then what we would say to each other just the three of us.

So I think sometimes things can get uglier than I want them to. Ugly is not the right word. Just messier, I think. I just, I hate dealing with that stuff. So

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there's always this underlying fear that we're going to go to a retreat, and something's going to come up, and a fight's going to start. Or, you know, whatever. But 99% of the time, our retreats are actually very pleasant, and they're productive.

But no matter what, all three of us all walk out of those retreats just with this renewed sense of purpose, you know. We have these new numbers. We have these goals. We have these rocks to work on. So it's not about what we did last quarter. It's okay. Our focus is this quarter. Let's go. So it's just a good motivator, actually, just to get refocused and re-energized for the upcoming quarter.

Melissa: Yeah, that makes sense. You guys will have a bunch of new things to talk about, especially since you are for sure going to law school.

Gretchen: Yeah. So the thing is, this may actually be my last retreat.

Melissa: Oh, why not June?

Gretchen: Potentially. Potentially.

Melissa: Ah, this is so. It's like bittersweet.

Gretchen: I know. Because I actually almost asked Chris and Jake like can I just come to the retreats anyway? I mean I'll still be working here, just not full time. So you know, can I just come? I don't know. Well, maybe we'll talk about that at the retreat.

Melissa: Yeah.

Gretchen: Because I do love, like we all love the retreats. We all look forward to it. Because even those hard conversations that are happening, they needed to happen. So there's just usually the sense of relief afterwards. It's just being in the middle of it is ugly, and everyone's uncomfortable, and we all hate it. But it still needed to happen. If it didn't

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happen there, it would have happened in a different place that would have been way uglier and way less productive. So.

Melissa: Yeah, yeah.

Gretchen: I think that's another actually good thing about the retreats is that we do have the space to handle the tough issues between us that we don't like to handle on our own.

Melissa: Yeah. I mean honestly sometimes, even speaking for myself, dealing with someone else where there's some heat and friction. It's a good idea to have a neutral space.

Gretchen: Yeah.

Melissa: With someone who doesn't have a bias. It's just like no, no. We're gonna get to the bottom of this. It just makes it easier on everybody. Yeah, yeah.

Gretchen: Yes. So that's always my underlying angst about the retreats is like oh, shoot. Did somebody have something that they're waiting for the retreat to talk about?

Melissa: You guys usually know though before. You're not usually shocked by anything.

Gretchen: Yeah, that's true. That's true.

Melissa: You walk in like yeah, there's some things.

Gretchen: I think this one will be good. I think this one will be fine.

Melissa: Oh, well, awesome.

Gretchen: Yeah. Yeah.

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Melissa: That's fine too.

Gretchen: Yeah, that's true.

Melissa: Yeah. Whatever's needed. Yeah.

Gretchen: Yeah.

Melissa: Oh, man. Anything else? I'm just thinking of people out there who are either listening to this with someone who is sitting in that seat. That it's really focused on execution and the in the business work that's a key player. Or someone who maybe this gets passed to for them to listen.

Gretchen: Yeah.

Melissa: Then I have a second question, a follow up question to this, but yeah anything you'd say to those people who are just open?

Gretchen: So yes. It's actually two, the operations. It's relating to the operations and the owners, their relationship. Like the operations person has to be able to push back on the attorneys. They have to be able to go to their boss and say, "No, this is not okay." They have to be able to, and I feel like you know certainly as my replacement.

I mean I have no problem saying that to Chris because he's my husband, and I'm right and he's wrong. That's just all there is to it. Then even Jake because I've known him so long. I have no problem marching into Jake's office and being like wait a minute. This is not cool. Whatever it is.

But I think for the average operations person, I think that's a very hard thing to do to your boss. It's a very hard thing to push back on your boss because he signs your paychecks, and they determine if you're going to be employed or not, you know.

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So I think a good operations person has the ability to go and do that, and a good owner has an open enough mind that they'll listen. They don't necessarily have to agree and do what they say, and the operations person has to understand that too. But they have to be willing to listen and actually think about it, and not be offended or upset by it. But I think it's important that they take the time to really think about what they're being told because that's a scary thing for the operations person to come in and tell their boss "Hey, this isn't cool." You know?

Melissa: Yeah. You know the reason I think you can do that. You have history, but I'm even thinking of other people I've seen in this role. Is that there's trust in that person in that seat.

Gretchen: Yeah.

Melissa: They know you're there for the right reasons, and you make decisions from a place of deep understanding of how this goes and deep integrity. You are lined up with the core values of the firm.

Gretchen: Yeah.

Melissa: Straight up. If that person, I'm asking I guess. Do you think if the person is a little off or has an agenda that's not really aligned with where the firm is going, is the attorney supposed to be as open? Is there room for discretion based on motivations by the person sitting in that seat?

Gretchen: Oh, absolutely. 100%. I mean, you know, obviously operations people, we're as human as everybody else. My perspective is not always the right one, but I do feel that it is their job just to listen. Usually once I've told them, whether they choose to act on it or not or whether they decide to do anything about it or not, that's on them.

But at least then I've done my job in pointing it out to them and being like hey, this isn't working well. Or hey you really hurt this person's feelings the way you were talking to them yesterday. Or whatever it is, you know. I

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mean I know those things aren't easy to hear from anybody, let alone a staff member.

So that's why I think, you know, just be open. Obviously use your judgment and move according because it is still your firm. Even to this day, I'll tell Chris and Jake I'll do what you tell me to do because this is your firm. My name is not on that door. You are my boss, and I will do what I'm told. So like.

Melissa: You have a seat at the table.

Gretchen: Yes.

Melissa: You use that. You use your voice at the, yeah.

Gretchen: That's exactly right. So the operations persons needs to have a seat, and the attorney, you know, the owner needs to respect that, but then the operations also needs to understand that it is ultimately the owner's choice, decision. If you want to have the staff member pissed at to you for week and a half, great, that's on you. But at least I did my part to clear it up, get it fixed, whatever.

Melissa: Yeah. That makes a lot of sense.

Gretchen: Yes.

Melissa: Okay now question about to the firm owner that's listening to this that doesn't have this seat. This position is not filled. They'll need to do that at some point, whether they're a little late on it or it's a little early for them. Any advice that you would have for either how to set this up well, just from your vantage, or what to look for? Any advice. If they're going to be heading in that direction, would you give a piece of advice?

Gretchen: So I would actually give two. The first one is to have a system. Have a job description set up for this person so that way their role is clearly defined. Every role needs definition for sure. Because it makes everyone's

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job so much easier and so much better. It just, I don't know, it makes such a difference having that role defined. So they know what they're doing instead of just everything getting dumped on them. You know.

That's my first piece of advice is to just clearly define the role so that you know what you're looking for. Someone who can check these boxes, you know.

The second piece of advice is to use Jay Henderson because that man. Holy cow. He's somebody that we have heard about for years, years. Everyone raved about Jay Henderson. Use Jay Henderson, his hiring MRI. Do it, do it, do it. We just didn't. It's one of those things we are kicking ourselves for now because we did have an attorney that we hired and shouldn't have. They didn't even last 90 days.

Literally as soon as we got the assessment back from Jay Henderson. Because we just kept hoping that she would get better. We kept hoping that more training, you know. Then we got his assessment back and we're like, oh God. No. This is not gonna work. So we could have totally avoided hiring this person in the first place.

So I would tell anyone listening like just do it. If you're hiring for any position for anything, talk to Jay Henderson first. Because I tell you what, he's first of all, one of the nicest people I've ever met. Second of all, he knows his shit and has made such a difference. Every single person we've hired since then, we won't even interview them until they've taken his assessment.

We've avoided some I'm sure. Because we're nice people. We want to see the best in the person sitting across from us, and we need this position filled. So we're like we want to see the best in the person across us. But when we can get, again, facts, not feelings. If we can get this objective assessment back, telling us all of the issues this person has, really I think we've dodged several bullets since we've started using Jay.

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Melissa: I love that that was your second piece of advice. So I've heard of him as well. Then once you guys started using him, and he made such a difference in your firm. So then I talked to him. I've used them inside of Velocity Work now, and I'm still using him. I'm trying to find the right next hire, and he's been incredible.

Also, I had him talk to a small group that I run yesterday. Yeah, it was yesterday. He came on, and it was all about performance management to this group and how to actually manage performance. None of them have ever used as assessment. If they did, this would be on steroids. His presentation would have been on steroids for them because they would understand oh, these are the levers to pull with these employees. Not in a using people kind of way. It's in a understanding your people kind of way, you know.

So I think it was awesome to hear him talk to them. I think that many of them will end up hiring Jay, and I am all for it. I don't think there is a way that that is a bad decision to hire Jay to help with and provide some assessments.

Gretchen: I agree because we did that first too. We had him do an assessment on everyone that was currently working at Spring Law Group, including me, Chris, and Jake, you know. It was fascinating. It's fascinating. He did. He kind of gave us the breakdown on, "Hey, this is how you want to talk to this person. This is how you want to approach tough subjects with this person." Oh my god like literally game changer. Like call Jay Henderson if you're ever hiring. Even if you're not, do it on your staff. It's worth the money. It's worth the time. It literally is a game changer.

Melissa: I think his URL is realtalenthiring.

Gretchen: Yeah. Yeah. I think so too.

Melissa: So people can go check him out there.

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Gretchen: Yeah.

Melissa: He is a wonderful human. You just want to be around him.

Gretchen: Yes, he is. I know, right. Yes. Yeah.

Melissa: Well, thank you so much for coming on and just sharing a bit about your experience of what it's like in this role, especially as you guys have grown. I hope that people take away that, I think it's easy for our jobs to feel messy. Yours has felt messy and then maybe not messy and then messy, but it's the growth of the curve, right, or the curve of the growth. It has shifted. So your job, though messy and it's morphed, it's a different job right now than it was three years ago.

Gretchen: Yeah.

Melissa: I wonder if people think that there is a job out there. Or like that this seat can ever be just easy peasy. Just saunter into work, saunter out of work at maybe like 9:00 to 3:30 or 4:00. I'm not saying that people can't create those hours for themselves. I'm not saying. But this is a job.

The operation seat is what you said earlier. The kind of person that's good for that is the kind of person that has the mentality that shit's gonna get done. You need to get, we didn't actually go into delegation. That's for another day, I guess.

Gretchen: Oh, yeah.

Melissa: You need to stop being the one to do it all, but you need to be managing the people who are behind it. Right. So.

Gretchen: Can I just add one more thing just on that? I think one of the most important things you can get in an operations manager too is someone that can speak up for themselves. Because there have been many times I've had to go to Chris and Jake, and be like no, this is too

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much. I can't do one more thing. So that was a very hard thing for me to do because I want to be able to do everything, but I just can't.

So don't hire the girl that's gonna just take everything you say and just do everything you want her to do because she'll do it. She will. She'll break her neck doing it for you. There has to be balance. You have to have someone that can stand up for themselves to say yes, I can get to it but not for three more days because I've got too much other stuff to do before now. Hey, I can't do one more thing. We have to get someone. It's time to hire someone new or whatever it is. Just don't get a yes girl because that, you'll just wear her down and break her neck. Yeah.

Melissa: Yeah. Yeah. Yeah, definitely. Because that's a really good point. That's a really good point. Yeah. Thanks for coming on. This has been so fun to talk to you. Whether someone's got someone in the seat or not, it's just never a cakewalk. That's not the nature of this role.

If you have a COO, likely you're growing, right? If you have someone that's in that seat that's really running things behind the scenes, likely you're growing. If you're growing then it's never going to be a cakewalk job. There's always new challenges, new things to think through, new systems, new processes, new people. If you're in operations, you have a lot to do with that. So even though you had the title office manager, ugh I did not know that. That is not what you were doing, but whatever. Not what it was on the freaking accountability chart.

Gretchen: No it was not.

Melissa: So yeah.

Gretchen: I think my signature block on my email still says office manager.

Melissa: Oh my god.

Gretchen: It's so funny.

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Melissa: Change that.

Gretchen: Yeah I'll go change it. I will.

Melissa: Okay. All right.

Gretchen: I'm just gonna put boss extraordinaire.

Melissa: There you go. There you go. Oh thank you. Thank you so much.

Gretchen: Yeah, happy to do it.

Melissa: Bye.

Hey, you may not know this, but there's a free guide for a process that I teach called Monday Map, Friday Wrap. If you go to velocitywork.com, it's all yours. It's about how to plan your time and honor your plans, so that week over week, more work that moves the needle is getting done in less time. Go to velocitywork.com to get your free copy.