Top 10 Practice Management Tips

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Presented by:
Donna Moore
Law Society of Alberta
Calgary, Alberta

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TOP 10 PRACTICE MANAGEMENT TIPS

PRACTICE REVIEW

The Practice Review team develops effective ways to assist lawyers in learning good practice and client management skills. We work with others across the organization to determine which lawyers are at risk for complaints and action preventative programs and resources such as the Responsible Lawyer Initiatives, Office Consultations and Mentor Connect programs. Practice Review also conducts general reviews and assessments of lawyers who are referred through the complaint process or through the conduct hearing process.

THE TOP 10 PRACTICE MANAGEMENT TIPS

Today's talk in no way presents "THE" Top 10 – that is to say, these are not exhaustive and have not been "vetted" or "voted on". Rather, they are some ways to manage your practice, your clients and yourself, derived from what I see in lawyers' offices and what I use/share/develop with and for the lawyers I see.

They aim to:

- Increase efficiency
- Reduce complaints
- Help you comply with the Code of Conduct

1. INVARIABLE PRACTICES

The invariable practice is one that is done, without fail, on every file (though there may be the rare exception). They aim to:

- Streamline your practice
- Ensure consistency
- Facilitate premium client service
- Assist in responding to complaints
- And assist in making ensuring best practices are achieved.

There are many reasons for invariable practices. For instance, if you can implement an invariable practice to record a contemporaneous record of every telephone or office attendance, scan and store it on the client's digital file and (if you keep physical files) on the physical file (on a correspondence or note brad) then you can say readily access that record, pull it and present it to a complaints officer if you are preparing a response to a complaint. Being able to say, “it is my invariable practice to do…” facilitates easy response, credibility and reduces stress.

2. OFFICE MANUAL

A law office manual is a helpful reference tool for your team and can:

- Give step-by-step directions on office processes
- Help train new staff
- Reduce mistakes, misunderstandings or false expectations
- Identify ways to improve client service
- Boost employee performance
- And more

Good inclusions in your law office manual are:

- General Policies – such as confidentiality, security, privacy and harassment.
- Employment Policies - employees’ behaviour as representatives of your firm, dress codes, online representation and so on. Express the policies in ways that support a positive and functional working environment.
- Office Hours, Hours of Work, Holidays and Leave
- Payroll and Benefits
- Job Descriptions
- Client Service
- Client Representation – such as procedures for engaging and declining representation. This includes customer service standards for intake; retainer (and non-retainer) letters; contingency fee agreements; conflict checks; collecting client identification and verification information; billing procedures; and the receipt, retention and return of client documents.
- Communications