



THE FOLLOWING CHECKLIST COVERS THE 12 KEY INTERNAL POLICIES & 12 KEY EXTERNAL POLICIES YOUR LAW FIRM SHOULD HAVE IN PLACE.

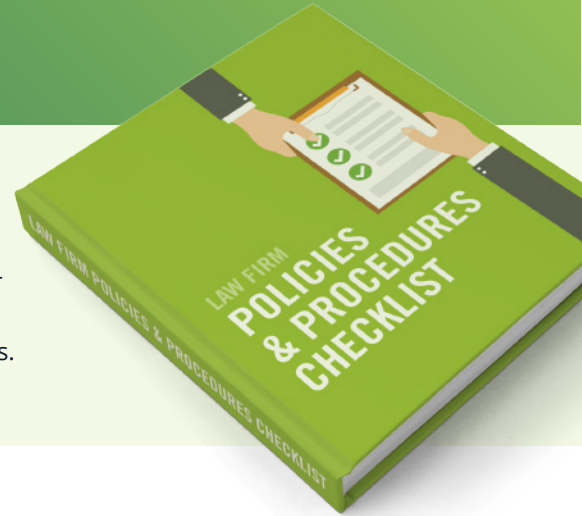
You can pre-educate, pre-screen and pre-condition your clients to want to hire you and to act in the way you want them to act by having written external policies that you share with them. Similarly, you can provide clear guidelines and structure to your firm with written internal policies for you and your staff.

INTERNAL POLICIES

- ATTORNEY-CLIENT CONFIDENTIALITY**
- CLIENT INTERACTION**
(professional but not friends) especially outside of the office in sensitive practice areas.
- LEGAL SERVICES FOR STAFF, FRIENDS & FAMILY**
- FOLLOWING DOCUMENTED PROCEDURES & AGREED METHODS FOR QUESTIONING/ IMPROVING DOCUMENTED PROCEDURES**
- BUSINESS HOURS & DRESS CODE**
- TIME SHEETS**
- ATTORNEY-ACCESS**
(by appointment or emergency)
- PERSONAL BUSINESS WHILE AT WORK**
- CLIENT COST ADVANCEMENTS**
- WORK HOURS & HOLIDAYS**
- CENTRALIZED FILES OF THE FIRM**
- JOB DESCRIPTIONS**
(receptionist, secretary, paralegal, associate, rainmaker, manager & owner)

EXTERNAL POLICIES

- DEFINITION OF THE WORD "EMERGENCY"**
- ACCESS TO ATTORNEY**
(by appointment so that...)
- BILLING WHAT YOU DO/DO NOT BILL FOR**
(travel, paper clips, etc.)
- COSTS VS. FEES**
- NEW DEVELOPMENTS IN CASE**
(both directions)
- TREATMENT OF OPPOSING PARTIES**
(your values, so as to not make a bad situation worse, etc.)
- DEFINITION OF THE WORD "HONESTY"**
- FILE RETENTION**
(are you going to be their reference librarian?)
- REFERRALS**
(discuss it so you train them)
- PRIVACY & CONFIDENTIALITY**
- BOUNDARIES & DURATION OF ATTORNEY-CLIENT PRIVILEGE**
(to protect you & them and as a marketing lesson)
- DEFINITION OF A-F CLIENTS.**



KEY ADMINISTRATIVE PROCEDURES

We recommend the following 24 Key Procedures to systematize your law firm for better profitability. By having clear, written procedures you encourage and empower your staff to consistently, efficiently and predictably perform daily tasks.

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|---|---|
| <input type="checkbox"/> ANSWERING THE TELEPHONE & TAKING MESSAGES | <input type="checkbox"/> NEW CLIENT ENGAGEMENT |
| <input type="checkbox"/> ROUTINE CORRESPONDENCE
(list of and how to) | <input type="checkbox"/> DECLINING A NEW CASE OR ENGAGEMENT |
| <input type="checkbox"/> SCHEDULING APPOINTMENTS
(prospective clients, current clients, opposing counsel, other) | <input type="checkbox"/> PRE-ENGAGEMENT GLIDE PATH |
| <input type="checkbox"/> CALENDAR & DOCKET CONTROL | <input type="checkbox"/> POST-ENGAGEMENT 15, 30, 60, 90, 180 DAYS ETC. |
| <input type="checkbox"/> SCHEDULING HEARINGS | <input type="checkbox"/> ACCOUNTING FOR TIME, TASKS & VALUE |
| <input type="checkbox"/> OPENING A NEW FILE, CASE OR MATTER FOR A NEW CLIENT | <input type="checkbox"/> PREPARING BILLS |
| <input type="checkbox"/> OPENING A NEW FILE, CASE OR MATTER FOR A CURRENT CLIENT | <input type="checkbox"/> ACCEPTING PAYMENT |
| <input type="checkbox"/> MONTHLY FILE REVIEW | <input type="checkbox"/> MONTHLY BOOK KEEPING |
| <input type="checkbox"/> FILE PROTOCOLS | <input type="checkbox"/> MONTHLY NEWSLETTER |
| <input type="checkbox"/> CLOSING FILES, CASES, MATTERS | <input type="checkbox"/> COMPUTER FILE ORGANIZATION SCHEME |
| <input type="checkbox"/> CALCULATING & DOCUMENTING STATUTES OF LIMITATIONS OR OTHER SELF-IMPOSED DEADLINES. | <input type="checkbox"/> OPERATING INSTRUCTIONS FOR ALL TECHNOLOGY |
| <input type="checkbox"/> CONFLICT CHECKING & DOCUMENTATION | <input type="checkbox"/> MONTHLY REVIEW OF ALL POLICIES & PROCEDURES SO WE ARE ALWAYS GETTING BETTER. |