

# PRODUCTION: 24 KEY POLICIES

## EXTERNAL POLICIES

1. Definition of "Emergency"
2. Access to Attorneys
3. Billing: What you do/do not Bill for
4. Costs vs. Fees
5. New Development in a Case
6. Treatment of Opposing Parties
7. Definition of the Word "Honesty"
8. File Retention
9. Referrals
10. Privacy & Confidentiality
11. Boundaries & Duration of Attorney-Client Privilege
12. Definition of A – F Clients

## INTERNAL POLICIES

1. Attorney-Client Confidentiality
2. Client Interactions
3. Legal Services for Staff, Friends & Family
4. Following Documented Procedures/Routine Maintenance
5. Business Hours, Holidays & Dress Code
6. Time Sheets
7. Attorney Access
8. Personal Business While at Work
9. Client Cost Advancements
10. Compensation
11. Centralized Files
12. Job Descriptions
13. BONUS: Statute of Limitations & Deadlines

# PRODUCTION: 24 KEY PROCEDURES

1. Answering the telephone and taking messages
2. Routine correspondence
3. Scheduling appointments
4. Calendaring, docketing and tickling deadlines with use of the electronic calendar and tickler system
5. Scheduling hearings, mediation and depositions

6. Opening a new file, case or matter for a new client
7. Opening a new file, case or matter for a current client
8. Monthly file review
9. File protocols
10. Closing files, cases and matters
11. Calculating and documenting statutes of limitations or other self-imposed deadlines

12. New client engagement
13. Pre-engagement glide path
14. Post engagement (15, 30, 60, 90, 180 days etc.)
15. Accounting for time, tasks and value
16. Preparing bills
17. Accepting Payment
18. Conflict checking and documentation

19. Declining a new case or engagement
20. Monthly book keeping
21. Computer file organization scheme
22. Computer back-up
23. Monthly maintenance meetings: policies and procedures
24. Monthly Newsletter