LAWYER TO LAWYER MENTORING PROGRAM
WORKSHEET S
INTRODUCTION TO LAW OFFICE MANAGEMENT

Worksheet S is intended to facilitate a discussion about the mentor's law office, how it is managed, and where to locate resources for learning more information about law office management issues.

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➢ Take the new lawyer on a tour of the mentor's office, explaining how client files in mentor's office are managed and discussing the best practices for the following related issues:
- Time records.
- Records of client-related expenses.
- Billing system.
- Client retainer and/or payment schedules.
- Fee agreements, including common fee agreements, the advantages and disadvantages to each, ethical considerations surrounding each, examples of improper provisions in fee agreements, and the importance of using engagement, non-engagement and disengagement letters.
- Escrow and trust accounts, including establishing an IOLTA, the how-to's of accounting/auditing, use of interest proceeds, and proper procedures for handling funds and other property belonging to client.
- Filing system, including procedures for opening and closing files, procedures for conflict checking, creating a checklist for new files, the importance of preparing a case memorandum and case plan, how to document the progress on cases, organizing both the file contents and the office filing system, and file inventory and review procedures.
- Document retention plan.
- Calendar and "tickler" or reminder system.
- Information Technology Systems, including docketing software.
- Methods of keeping clients informed about the progress of their matters.

➢ Discuss staff, equipment and other administrative issues in mentor's office, including the best practices for at least the following matters:
- Mail distribution procedures.
- Procedures for handling telephone calls, including when they should be returned.
- Considerations in purchasing office furniture and where it can be purchased.
- Library and research systems.
- Considerations in purchasing office equipment and the types which are essential and/or most helpful.
- Other resources (publications, seminars, equipment, etc.) that a new lawyer might find particularly helpful in his or her work.
- Personnel, including identifying employees who are needed to run the office efficiently and the benefits and disadvantages to hiring different types of employees (i.e., traditional, independent contractor, temporary).

- Employee selection, including interviewing techniques, background investigations, extending offers, and maintaining personnel files.
- Employment and discrimination laws of which an employer must be aware.
- Supervising staff, handling employee discipline and preventing the unauthorized practice of law and the unethical practice by associates.
- Considerations in purchasing insurance.

➢ Share with the new lawyer ethical and professional marketing techniques, effective rainmaking tools, and how to create a marketing plan for a firm.

➢ Review and discuss the suggestions made in the attached articles:
Dan Pinnington & David Bilinsky, *Implement Appropriate Internal Controls,* LAW PRACTICE TODAY, April 2006. https://www.abanet.org/lpm/lpt/articles/fin04061.shtml
Allison C. Shields, *How to Take Control of Your Practice by Creating Vision and Mission Statements*, GP/SOLO LAW TRENDS & NEWS BUSINESS LAW, Feb. 2006. http://www.abanet.org/genpractice/newsletter/lawtrends/0602/index.html

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RESOURCES
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American Bar Association Law Practice Management Section
http://www.abanet.org/lpm/home.shtml
-A section of the ABA which provides helpful resources to its members about all aspects of law practice management.

American Bar Association Young Lawyers Division E-Library
http://www.abanet.org/yld/elibrary/home.html
- Provides information about and materials from programs held at Young Lawyers Division Meetings and Conferences. Includes helpful outlines giving practical tips on how to practice law.

Association of Legal Administrators Legal Management Resource Center
http://thesource.alanet.org/portal/server.pt
-Provides online tools, forms and checklists and other valuable information about law practice management issues.

MyShingle.com   http://www.myshingle.com/2008/01/resources/online-guide/
-Provides links to on-line resources and manuals for starting your own law practice

Unlock Your Potential http://www.abanet.org/yld/publications/Unlockresourceguide.pdf

-An American Bar Association Young Lawyers Division Members Service Project which is designed to aid young lawyers in determining whether they have chosen the right career path and offer resources and support to aid in starting a legal practice.