

FUNDAMENTAL LAW OFFICE MANAGEMENT

Overview: Law office management techniques and responsibilities will be discussed, such as effectively utilizing staff, maintaining healthy client relationships, cost-effective office management techniques and tips, using social media and use of technology.

- I. Office Space/Location
 - a. Location
 - b. Office Sharing
 - c. Parking
 - d. Office Persona
 - e. Office Support
 - f. Access to Resources
 - g. Proximity to Courthouse/Home
 - h. Office equipment/technology
 - i. Conference Rooms
 - j. Budget

- II. Essentials
 - a. Bank Acct (IOLTA, Business, Savings, etc.)
 - b. Professional Liability Insurance
 - c. Business Credit Card / Using Lending
 - d. Nice Suit(s) / Professional Persona
 - e. Computer/Printer/Scanner/Fax
 - f. Website
 - g. Email Address
 - i. Customizing
 - h. Software (billing, e-discovery)
 - i. Accounting System
 - j. Docket Management System
 - k. Document Management System

- III. Generating Business
 - a. Website
 - b. Online Marketing
 - c. Referral Sources (paid and unpaid)
 - d. Networking
 - e. Social Media
 - i. Facebook
 - ii. Linked In
 - iii. Twitter, Instagram, Tik Tok
 - f. Business Cards

- IV. Generating Management

- a. Effectively Hiring Staff
 - b. Effectively Utilizing Staff
 - c. Maintaining Healthy Client Relationships
 - i. Communication Style
 - 1. Direct Communication
 - ii. Expectations
 - 1. Time Frames
 - a. Frequency
 - b. Response Time
 - d. Keeping Overhead Low
 - e. Electronic File Management
 - f. Billing Tips
 - i. Keeping Track of Hours
 - ii. Different Forms of Payment
 - g. Finding Free Resources
 - i. Sample Motions
 - ii. Using Law Clerks
 - iii. Template Docs
 - iv. Google
 - h. Legal Research Tip
 - i. Important of Representation Contract
 - ii. Fee Structures
 - iii. Defining Scope
 - iv. Contingency vs. Hourly vs. Flat Fee
 - 1. Hybrid
 - i. Professionalism
 - j. Importance of Screening Cases
- V. Pitfalls to Avoid / Common Mistakes
- a. Efficiency of Time
 - i. Engaging the Right Clients
 - ii. Optimizing Time
 - iii. Knowing When to Quit
 - b. IOLTA Importance
 - c. Modifying Agreements
 - d. Fee Splitting Issues
 - e. Co-Counseling
 - f. Growing Business
 - g. Choosing Good Partners/Staff
 - h. Income Strategy
 - i. Mental Health/Healthy Daily Routine
 - i. Procrastination
 - ii. Stress and Burn Out