

WORKSHEET T
INTRODUCTION TO LAW OFFICE MANAGEMENT

Worksheet T 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 your mentee on a tour of your office, explaining how client files in your 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 a 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 your office, including best practices for 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 your mentee might find helpful in their 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

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- investigations, extending offers, and maintaining personnel files.
 - Employment and discrimination laws an employer must be aware of.
 - Supervising staff, handling employee discipline, and preventing the unauthorized practice of law and unethical practices by associates.
 - Considerations in purchasing insurance.
- Share with your mentee ethical and professional marketing techniques, effective rainmaking tools, and how to create a marketing plan for a firm.

RESOURCES

American Bar Association Law Practice Management Section

<https://www.americanbar.org/topics/lpm/>

-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

https://www.americanbar.org/groups/young_lawyers/

-Provides various information and materials for young attorneys, such as career tools, new lawyer practice area resources, and more.

Association of Legal Administrators Legal Management Resource Center

<https://www.alanet.org/resources/resource-hub>

-Provides online tools, forms and checklists and other valuable information about law practice management issues.

Columbus Bar Association Model Fee Agreement Forms

<http://www.cbalaw.org/formsdocuments/modelfeeagreements/index.php>

-Provides sample fee agreements for Ohio lawyers

MyShingle.com <http://www.myshingle.com/2008/01/resources/online-guide/>

-Provides links to online resources and manuals for starting your own law practice

Ohio Access to Justice Foundation <https://www.ohiojusticefoundation.org/lawyers/iolta-iota-for-lawyers/>

-Provides the rules governing Ohio IOLTA/IOTA accounts and information about Ohio IOLTA/IOTA accounts.

Officekeeper – Ohio State Bar Association

<http://www.ohiobar.org/pub/?articleid=877>

- An online nuts and bolts resource guide to opening, maintaining, and closing a law office,

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covering both the day-to-day operations of a law office, as well as professional responsibility. It includes checklists, forms, references, and links to websites and the new Model Rules. (You must be an OSBA member to access.)

Unlock Your Potential <https://startmyfloridalawfirm.com/wp-content/uploads/2016/03/Unlock-Your-Potential.pdf>

-An American Bar Association Young Lawyers Division Members Service Project 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