

SUMMIT THE HIERARCHY OF TASKS AND PRACTICE BETTER LAW ☐

I What's the Problem ☐

- Recession ☐

Required firms to become more business-like (assessing profit margins)

New set of competitive trends has taken root

Glut of practitioners ☐

Pricing pressures (alternative fee arrangements)

Firms proactive using AFAs are more profitable in using them ☐

Further commoditization of legal work ☐

New forms of competition (online and virtual) ☐

Efficiency in legal services delivery forced up us

- Billing Gap ☐

6.9 average number of billable hours worked per day ☐

\$180,000 is average lost revenue per year for 5 attorney firm (\$300 rate)

Larger firms are better at filling the billing gap ☐

II What your clients expect and deserve ☐

- Your undivided attention ☐
- Prompt responses ☐
- Excellent work that is error-free and timely ☐
- Cost effective ☐
- Care and respect ☐

III What you need to know ☐

- The status of every one of your matters, cases or projects ☐
- What are the next steps in each
- What is the priority
- What is the deadline
- Who will be responsible for executing this step
- How will you be accountable
- How much time will be spent doing the next step

Example of doing this using a simple spreadsheet ☐

III The three hats the practitioner wears (rainmaker, manager, technician) ☐ ☐

Non-billable tasks that consume your time

- Rainmaker ☐
 - Free consultations ☐
 - Checking e-mails ☐
 - Networking ☐
 - Marketing activities
 - Staying in touch with former clients
 - Maintaining relationships with referral sources
- Manager ☐
 - Time entry ☐
 - Training ☐
 - Bookkeeping ☐
 - Interviewing and hiring ☐
 - Billing
 - Updating databases
 - Bank and post office runs, supplies, etc. (if solo or small firm practitioner)
 - Planning
- Technician ☐
 - Entering the same data in multiple systems ☐
 - Filing or updating files
 - Document management

Then some items that apply across the board ☐

- Nonproductive interaction with staff and co-workers ☐
- Internet surfing ☐
- Looking for misplaced things ☐

IV Where your focus should be ☐ ☐

- High level legal work ☐
- Maintaining client relationships ☐
- Goal setting and strategic planning (both for your firm and your cases) ☐
- Strategic management of your resources ☐
- Marketing/client development ☐

V Solutions to the problem ☐ ☐

- Develop internal systems and procedures ☐
- Maximize your use of technology for increased efficiency and productivity ☐

Technology tips ☐

- Don't buy software to solve yesterday's problems, buy software that will advance your practice
- Buy the best you can afford
- If you can't afford to buy the best, hold off until you can
- Spend the time and money on training to learn how to maximize your technology]

- Managing others ☐
- Personal time management skills ☐
 - Develop a time log to determine where your time is going
 - Set goals
 - Delegate (to whom, the best reasons, the best ways)
 - Outsource
 - Budget your time and plan your work week in advance
 - Sample of weekly time budget in graphical format ☐
 - Calendar tasks and work time
 - Make lists
 - Put billable work first
 - Learn to prioritize for maximum effect
 - Never answer your own phone
- Improve your client communication ☐
- Records management ☐

You've Reached the Summit! ☐

Overview of journey ☐

VI The 5 things top attorneys have in common ☐

- Have a plan in place to manage their time
- Develop practice systems and procedures
- Prioritize based on importance of each task
- Delegate non-attorney tasks to others
- Outsource what they aren't good at, or the tasks that aren't the best use of their time

Your Guides have been: ☐