

Organizing Around the Office Can Save Time and Money — and Your Sanity

by Peter Roberts

I meet many lawyers across Washington who have systems in place for workflow. Some systems are better than others — and all the systems are influenced by the area in which a lawyer practices. To implement a workflow system, first consider your practice area. Practice area affects a lawyer's daily routine in several ways.

- **Client expectations** vary based on experience with lawyers. Does the client understand his obligations and responsibilities to you and to the matter? Are you prepared to spend the time to educate the client about these concerns?
- The practice area may demand **travel** that may disrupt your personal life.
- How much **paperwork** the matter generates can be related to the type of practice area. Are you good with organizing paperwork and files?
- There may be many **meetings** involved with certain practice areas. Some of these meetings may take place during the evenings.
- Living in a particular **geographical area** may enhance an attorney's ability to generate work in his practice area. An example is agricultural law.
- Certain practices are prone to **interruptions** by the telephone, walk-in clients, and the need to be at the courthouse or jail on **short notice**.

"I-5 Lawyers" spend more time in their vehicles on the way to court than in their offices. My point is to consider carefully how your practice area fits who you are and what working lifestyle you want.

Next, look at your practice in the bigger picture: Plan, organize, implement, and control. In a law firm, that means:

- **Planning:** Setting goals and designing systems for the work. How does work get produced and out the door?
- **Organizing:** Acquiring resources to get the work done. This includes staff, equipment, procedures, software, furniture, and vendors.
- **Implementing:** Communication

and training of others to know what to do and how to do it; a procedures manual.

- **Controlling:** Measuring results and variances from the plan. Are deadlines still too oppressive? Are there bottlenecks? Forgotten deadlines?

Practices experience difficulty when there is no organization due to poor calendaring, lost files or documents, and procrastination. Organization involves three things:

1. **Managing your time effectively.** This means prioritizing your tasks. Do the most important tasks first. Managing time also means taking a break. Try to relax between projects. Above all, limit procrastination.
2. **Keeping things in their proper places.** Files go into file cabinets or onto shelves. Limit or eliminate the number and size of paper piles. Current projects are staged on a table. Filing is organized to facilitate getting documents into the proper client files. Most-often-used office supplies are kept near at hand.
3. **Following a protocol for everything that occurs in the law office.** "Protocol" means defining the procedure and documenting the steps involved for handling mail, e-mail, telephone messages, documents, physical files, electronic files, faxes, deliveries, and other procedures related to your particular practice area. Try different

approaches. A useful method is to mix paper and electronic systems. An example is to scan incoming important (not all) documents into your computer in addition to having them in the physical file.

I meet many lawyers who use Microsoft Office Outlook, a handy tool for managing conflicts checks, e-mail, calendar, tasks, documents, and contacts. One primary function of Outlook is scheduling events or deadlines on a matter (see Fig. 1). The WSBA Law Office Management Assistance Program (LOMAP) offers free Outlook classes; see www.lomap.org.

Think carefully about how you do your work and be open to change. Even under the best of circumstances, the practice of law is demanding. Asserting control over the aspects of your practice that you can control leads to a better-managed stress level and a more enjoyable work experience.

Being organized helps save both time and money. To close, here are a few additional tips on cutting costs around the office:

- Use a web fax service and receive your faxes by e-mail to avoid expenses for print cartridges, paper, and the space that a fax machine uses.
- Check out the refurbished computer-equipment websites of the major vendors and consider purchasing used equipment.
- Create a letterhead template rather than having stationery printed.
- Use an executive suite part-time as well as a home office rather than renting a full-time office space.
- Ask your malpractice insurance vendor if it will accept monthly payments rather requiring payment of the whole premium at once.
- Use a time and billing program to record time — it will yield higher revenues.
- Use hosted exchange services on the web rather than buying a server and the requisite software for sharing folders on a network. ◇

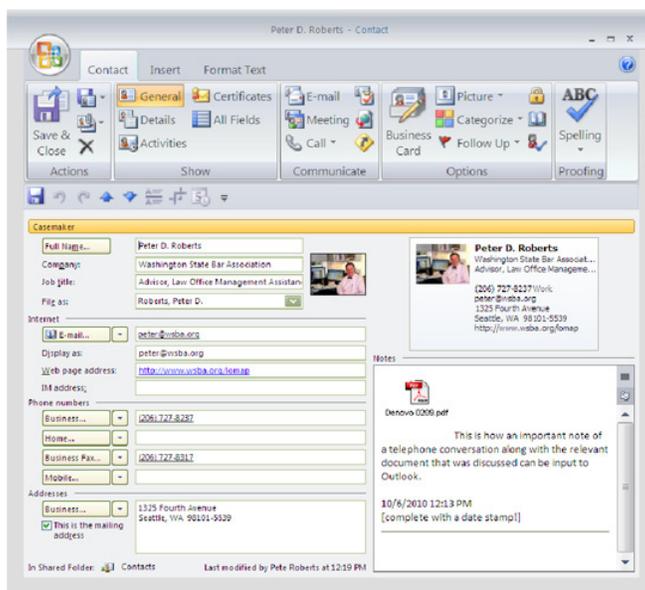


Fig. 1. Outlook can help you schedule events or deadlines on a matter.

Peter Roberts is the practice management advisor with LOMAP. He can be reached at 206-727-8237 or peter@wsba.org and www.lomap.org.