

GENERAL LAW OFFICE ADMINISTRATION

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LAW OFFICE MANAGEMENT PRINCIPLES

- **Macrosystems**
 - ◊ Made up of subsystems called Microsystems
 - ◊ Various elements can affect Firm (recession, laws, etc.)
- **Microsystems**
 - ◊ Made up of Minisystems (administrative and substantive)
 - ✦ Administrative – financial, personnel, marketing, etc.
 - ✦ Substantive – corporate, intellectual property, bankruptcy, etc.
- **Minisystems**
 - ◊ Exist within administrative and substantive systems
 - ✦ Chief Financial Officer, Accounts Receivable, Accounts Payable
 - ✦ Lawyer, Paralegal, Secretary, Word Processor, Copy Clerk

ROLES AND RESPONSIBILITIES WITHIN YOUR ORGANIZATION STRUCTURE

- **Office Administrator**
 - ◊ Oversees the entire office including staff and everyday billable and non-billable duties;
- **Paralegal Manager**
 - ◊ Supervises other paralegals ensuring their proper tutelage and correct assignments;
- **Paralegal / Secretary**
 - ◊ Responsible for substantive work as well as any and all clerical work needed at any specific time

MANAGEMENT OF DAY-TO-DAY OPERATIONS

1. Setting and Balancing Priorities

- **Large Firms** – balance assignments from different attorneys or paralegal manager
- **Medium Firms** – balance attorney assignments and light clerical duties
- **Small Firms** – balance substantive work, clerical duties, meet with clients

MANAGEMENT OF DAY-TO-DAY OPERATIONS

2. Allocation of Resources

- Relieves stress
 - ◇ Secretaries, Word Processors
 - ◇ Law Librarians, Law Clerks
 - ◇ Copy Clerks, Receptionists, File Clerks
 - ◇ Vendors

MANAGEMENT OF DAY-TO-DAY OPERATIONS

3. How to Utilize Delegation Properly

- Observing and recognizing the staff's strengths and weaknesses will allow you to draw upon their skills
- Know when to ask for help

MANAGEMENT OF DAY-TO-DAY OPERATIONS

4. Time Management Strategies

- Write down time as soon as task is performed
- Utilize time keeping software (*i.e.*, Legal 55)
- No time to write? Dictate!

OPERATIONAL SYSTEMS SETUP AND MANAGEMENT

1. Case Management Systems

- CaseMap / TimeMap
- Summation / Concordance
- AbacusLaw
- Amicus Attorney
- Needles

OPERATIONAL SYSTEMS SETUP AND MANAGEMENT

2. Calendaring and Docket Control Systems

- Allows for easy transfer of data thereby saving valuable time
- Can be adapted on a case by case basis
- Must **always** have a back-up system in place preferably kept by a paralegal

OPERATIONAL SYSTEMS SETUP AND MANAGEMENT

3. Records Management and Retention

- Conflict of interest check
- Preserve client's property
- Return originals to client
- Retain records for time allotted by law
- Client confidentiality

OPERATIONAL SYSTEMS SETUP AND MANAGEMENT

4. Security, Encryption and Disaster Recovery

- Document management systems
 - ◊ security at different levels – most secure method
- Use of encryption requires "keys"
 - ◊ most often used for electronic communication
- Disaster Recovery
 - ◊ back up data on USB Hard Drives, CDs, DVDs, Thumb Drives