



## **Best Practices for Your Practice: Advice from 10 Legal Characters**

**Lawyers learn from each other's experiences. Discover what you can learn from ten experienced lawyers as each relates an important best practice.**

“Most lawyers know very well how errors reflect their lack of ability,” said **Prudence Juris**. “It’s not only about being aware of the law in their jurisdiction, you must also recognize how asking the right questions is important. Smart lawyers rely on law practice management software to gather all documents necessary to prevent themselves from being placed in an actionable position. While law practice management software cannot prevent a lawyer from making a mistake in judgement or law, it can severely curtail the odds of a mistake occurring.”

“Upon meeting a new client, I discuss expected outcomes,” said **Solomon Solicitor**. “Experience has taught me that a prospective client who spends more time listening than talking is more likely to listen to my advice.

“During our initial conversation, I tactfully bring up rates and how I track my time. My fee agreement and all other new client intake forms are only a click away in my law practice management software. Neither I nor my staff enter time or expense entries until after we have accepted the client.

“Experience has also taught me that when I accept a client who cannot afford my level of service I’m accepting I will not be paid. It’s not improbable that a client who cannot pay will find another lawyer to sue me as a means of stalling payment.”

“To prevent myself from missing deadlines I set ticklers, also known as reminders, in my legal practice management software,” said **Catharine Counsellor**. “The local bar association has the jurisdiction- and rule-specific resources that integrate with my software.

“When someone in the firm sends an email or adds a document to a case file, practice management software automatically updates across the entire system. I can be at the beach enjoying peace of mind, knowing files are totally up to date and therefore I won’t miss deadlines.”

“The first thing I do when deciding whether or not to accept a new case is run a conflict of interest search in my law practice management software,” said **Daniela Defender**. “It searches contacts, notes, relationships, events, documents, time entry, communications, appointments, fee and cost entries and research. It searches our entire firm, regardless of who is in the office at the time, and returns the results in seconds. It presents me with a list to review, which I can save in the event I need to prove I conducted a search for potential conflicts of interest with due diligence.”

“My law practice management software lets me provide clients with my own online portal, where they can view and electronically sign documents” said **Alan Advocate**. “That saves them a trip to my office, the cost of mailing every document, and also lets them check at any time how their cases are progressing. They complete their own intake forms, after which I change the material they can see, share, and collaborate on.”

“When I delete a file on my computer, tablet, or phone, only the file header is removed from the directory,” said **Lee Gallman**. “Deleted files remain on the storage media, where a competent computer forensics investigator can find them. Even when overwritten, sometimes sufficient data from the original file remains for a case to be made, as some imprisoned people who chose not to have me represent them will confirm.

“I never want to see one of my documents, emails, or my browser history discovered and turned into a big news story. So I never write or send anything or surf anywhere that might cause me embarrassment.

“Since my law practice management software tracks all entries, notes and phone calls associated with each of my cases, I rest easy at night. Even if my files are examined and exposed to the world, nothing bad will come of it.”

“Unprofessional interactions make me cringe; and they happen more often than lawyers realize; sufficiently often that even an aware lawyer might not appreciate how many of us have made such blunders,” said **Bianca Barrister**.

“For example, discussing a legal matter in a public setting is unprofessional. So I only discuss cases verbally in my office, and I use practice management software to securely contain all notes, meetings, and documents relevant to each case.”

“Making clients wait disrespects their time, and to some, makes it appear I’m unorganized,” said **Lawrence Litigator**. “Because nobody wants to wait, I use law practice management software to keep appointments in one place, accessible from wherever I am, and by all members of my staff. Then I set reminders and check it regularly.”

“It drives me crazy when someone doesn’t give me their full attention,” said **Patricia Practitioner**. “When I’m meeting with a client my phone and email are off. Law practice management software keeps all documents relevant to a case at everyone’s fingertips, so I don’t have to ask my staff for files and documents. I do not understand why 70% of lawyers have not yet incorporated it into their practices.”

“When it comes to how clients feel about the service a lawyer provides, word-of-mouth is the best form of advertising, and happy clients attract new clients,” said **Samuel Sidebar**. “Practice management software has the ability to track and improve how you get referrals from your happy clients.”

**The best practices above are brought to you by Amicus Attorney.**

