

Practice Management Outline

Now that you have all the leads flowing and clients signing up, how do you manage it all?

1 Staff

Enough Staff –

Too much work leads to mistakes

You can only get so much done out of even the most talented person

Too much work leads to staff turnover

Even motivated staff will “burn out” if worked too hard

This is different for each person, but we run busy offices and the “right”

People will produce consistently high volumes

Listen to staff and ACT on what they tell you.

Happy staff = better client service

Burned out staff will mistreat clients, even if unintentionally

I lost an excellent paralegal to this phenomenon once.

Conversely, happy staff will go out of way to make clients satisfied.

Happy staff is, in part, a reflection of attorney/manager attitude

Truly top down applies here

Take time to talk to staff – they make or break you

Right Staff

No magic formula but matching staff to clients works well for me

Match age demographics

Prior financial distress experience, including bankruptcy is helpful

Must have empathy and be the right personality

Testing prior to hiring helps get the right staff

Testing services provide critical thinking and skills matching

I have not, in 26 years, been able to figure out better way than to test

Testing alone is not the answer but is helpful tool

Slow to hire – quick to fire – don’t waste time – you cant change personality

Don’t wait too long to fire. Just wastes time and upsets your staff

Leopards don’t change their spots.

Once past initial stages, don’t think they are keepers

Sometimes “true colors” take time to surface

Watch for hiding mistakes

Make your existing staff your eyes and ears

Training Staff

Time well spent

Time invested in training pays big dividends in happy staff and lower error rate

Don’t use “campfire” method.

Remember the old game of telling story one to next – ends up diferent

Create – or purchase – training materials
Easy to record your own
Purchase from Morgan

2 Processes and Procedures

Documented procedures

Make a “bible” of office procedures
True story – it saved my practice when my entire front staff quit in one month.

Standard “flow”

Bankruptcy is a repetitive – mainly – process. Cases should all go through the same checks and procedures. No need to re-think this each case.

Checks and Checklists

Like flying an airplane, good pilots use checklists, you should too.
Morgan King materials are excellent – I have used them for years.
Make your own changes for your local area of practice
In our court, we have several flows for different trustees

3 Clients

Set Expectations early

Tell them what to expect from you
And what you expect from them.
This includes payment – remember they have a system of “non-payment” which they will apply to you unless you change it.

Clients are not always right

The need to be gently – and politely - told when they are wrong
And they frequently are
But they are always clients – potential referral sources
So, remember this at all times and remind the staff regularly

Clients are not your friends

They will “throw you under the bus” in a heartbeat
They remember what you don’t say
They hear what they want to hear.
So document every contact – you will be glad you did
And make them sign all your CYA forms
You DO have them built into your practice, right?

Clients are best source of new business (or not)

The best advertising money can't buy.

They will provide testimonials if you ask them

And if you don't ask for them, you won't get them.

Optional Bonus 4th category, managing yourself.

Take time to work on you. –

You are your own boss.

You are responsible for just about everything ‘the good news is you are your own boss.

The bad news is you are your own boss’! How true that is.

Balance – not my strongest area but important – here are some thoughts:

Health

Augusten Burroughs - "*When you have your health, you have everything. When you do not have your health, nothing else matters at all.*"

Self education

I attend the “automobile university”

You are the average of the five people you spend the most time with.” — Jim Rohn

So, I hang out with folks who are better at what I am trying to do than I am, by listening to seminars, mp3 recordings of webinars, and other audio educational materials, subscribing to newsletters, etc.

Spiritual – I firmly believe that your spiritual condition matters greatly in all areas of your life. Take time to attend to this, even if only briefly, daily.

Family – if you don't have your family, what does all the rest matter?

Yet, we sometimes treat our family like “second class citizens”

Remind yourself, put photos on desk

I have a full size poster on wall! And get lots of comments about it.