Sole and small firm lawyers often do not have the resources to have an office manager to assist with that important side of the practice of law. This paper will cover ten tips in the area of Staff, Client, Marketing and Office Management to assist you in those areas.

PART A - TOP TEN STAFF MANAGEMENT TIPS

1. / Get Rid of Toxic Employees

The ideal work place from an employer's perspective involves trusted and loyal employees, who assist the employer in creating a financially profitable venture. The employees in turn want an environment where they will be valued, appreciated and properly remunerated. These objectives do not need to be in contradiction to each other.

However, there is nothing that reduces business productivity like a negative work environment. Toxic employees are dangerous as they contaminate the work atmosphere which affects not only their level of productivity but also that of their co-workers. Do not allow negativity from any of your employees. If an employee exhibits such behavior, do not ignore such conduct hoping it will go away. Address it immediately, and be prepared to terminate that employee if the tide of negativity can not be turned.

2. / Consider Alternative Forms of Remuneration

Studies have demonstrated that financial remuneration is not necessarily the most important factor in determining job satisfaction. It is however hard to feel appreciated as an employee if one is being paid below the norm for a comparable position in one's community. Being the highest paying employer does not guarantee job satisfaction in the employee. On the contrary, should an employee receiving top dollar find themselves needing a change of employment, (and from time to time, people do need change) they will be unwilling to look for another position, knowing it will likely result in a cut in pay. The employer is then stuck with an employee who does not really want to be there. This is bad for office morale and productivity.

To keep good employees and employer may want to consider providing certain benefits that acknowledge the personal needs and interests of each employee. For some employees, flexibility with respect to the timing of work hours, and/or the ability to work at home may be more important.

We are big believers in our firm in rewarding behavior which has a direct positive impact on productivity. We usually do so by way of bonuses. Bonuses are usually a better way for en employer to reward than raises, as their impact is obviously continuous. Some employers tie their staff's remuneration to their office's profitability. One should also consider encouraging staff to come up with ideas that increase the bottom line, by giving them a stake in the profit they create is an example of a win-win proposition.

While ideally all employers should provide medical benefits to their employees the reality is that this is not always the case in small firms. For those who do not provide such benefits, you may want to consider this option as an alternate form of remuneration. Some staff will take lesser pay in return for medical benefits, which could be tax deductible to the employer in certain circumstances. Further such benefits may not attract CPP and EI employer deductions while the same amount paid in wages would trigger such liabilities. Providing medical benefits to one’s staff may also result in that benefit becoming available to the employer on a tax deductible basis.

3. / Create a Positive Work Atmosphere

Appreciation shown in small and continuous gestures creates a positive work atmosphere. This is turn should result in a productive and efficient office. An easy way to do so is by acknowledging each staff member’s birthday. A card, a small present, office lunch or a cake that could be shared with the entire staff go a long way to making the employee feel special. But even doing this kind gesture could backfire if the likes and dislikes of the person who is to be celebrated are not taken in account. Yes thoughts count, but only so much. Buying a cake with pecans for someone who is allergic to nuts, obviously does not achieve the right goal.

Commemorating other occasions such as Valentine's Day, St. Patrick's Day, Easter, Secretary/Staff Day with small token gifts of appreciation goes a long way in creating a happy atmosphere. Just as negative moods build and feed on each other, positivity feeds on itself as well.

Some offices do not provide beverages like tea and coffee, while others operate a “Staff Coffee Fund”. This is usually a thankless task for the employee who has to manage it. Inevitably it creates resentment by those who have to over-contribute to make up for those who under-contribute (whether by forgetfulness or cheapness).

Providing free tea/coffee/hot chocolate helps productivity as it eliminates the need for out of the office trips to purchase these items. For those days when our lawyers are too busy to stop for lunch, we keep some emergency supplies like Asian noodles and protein bars. The resulting productivity and appreciation outweighs the small cost of those items.

In our office we no longer allow the radio to be played during normal business hours. We found that it was a source of distraction for staff, and created a lot of wasted time as news and other tidbits would be invariably discussed, affecting productivity.

We do however provide a small library of pocket books, CDs and DVDs which staff can borrow. This gets periodically rotated. Staff is also able to take home and keep outdated magazines. This is an inexpensive way to put to use items that you may no longer need while creating a perk to your staff.

4. / Create a Time Bank Ledger

We recognized that employees may have needs requiring them to be away from their normal working hours. Letting staff bank extra time worked, which they can later borrow, allows them some control over their time.

The banking/borrowing of time is done by keeping track of time worked outside the usual work hours, or missed during normal hours. If done in slices as small as 5 minutes, it encourages employees to be punctual, while allowing them some freedom over their work day. In short, it makes them accountable. This avoids resentment by those who would not abuse their employer's generosity towards those who would.

If you are considering doing so, you should have a ledger created on an annual basis for each employee, and your office manual should outline this policy. Lastly, the employees should have acknowledged your policy in writing.

5. / Research Potential New Staff

Carefully review résumés before interviewing a potential employee. Do be attentive for spelling and grammatical errors. If the résumé has mistakes, rest assured, so will any work done for you by this individual if hired.

Conduct a courthouse search. You may find out that the candidate sued their last employer, which would provide the real explanation as why the potential employee does not want you to contact the prior place of work.

Also use the internet to research a potential employee. You will be surprised at what you can find out "Googling" an individual. Likewise there can be much information that one can gather on social utilities networks, such as LinkedIn, Facebook, or You Tube accounts.

When hiring, always contact references provided. The references should glowing, but if they are not, this could be an indication that the candidate may have limited judgment skills. Be also on the lookout for lack of references, but be aware that there exist companies which sole purpose is to provide fraudulent references.

A word of caution, do not hire an employee who does not feel they need to give their present employer any notice. Remember what goes around comes around, and they will likely be treating you the same way if they decide to leave your employ.

6. / Test Candidates

We routinely test potential employees during their interview. We have them draft a letter by hand, which establishes if the applicant can write and spell without the use of software to help them. This also lets us know whether the applicant's handwriting is legible.

Top applicants for clerical positions will be tried out on the premises, by hiring them for a day or a half day. We will pay minimum wage for that test period, so the employee does not feel used. The reality is you will not get much work done during the testing period. You will also not necessarily find out if the employee will work out. You will however find but out very shortly if the employee will **not** work out. This is easy to see when you have someone telling everyone what to do within their first half hour, or not being able to display the skills professed in their résumé. This test period avoids the grief of wasting time and resources on the wrong person for a 3 month probationary period.

For this "try-out" day to be useful though, one needs to build in tests. A simple example of such a test would be to give the candidate a stack of papers to photocopy which contains some double sided printed sheets. This allows you to ascertain if the potential employee is paying attention to the task given.

It is important to set the "try-out" as an equal opportunity for both the employer and the employee to find out if your environment is the right one for them.

When it comes to articling staff, we routinely assign a short research question to the top applicants. The idea is that the research should take less than an hour. This allows us to hire the student whose method of written communication works best with ours. Often we get applicants declining to participate in the assignment for one reason or another. This allows us to avoid the “minimum effort” type of employee.

7. / Hire Outside the Box

While conducting a survey with our staff we discovered that photocopying was the task the most disliked by everyone. Our firm enjoyed a good relationship with the principal of a local high school. We accordingly arranged for the principal to send us a student who was interested in part time work. The student only comes when needed, and is obviously only paid when working. Students are also more flexible to cyclical work, and eager to obtain work experience.

Over the years there will be some turnover with students invariably leave our community to attend post secondary education, but overall the experience has been positive. Further as the principal screens the students for us, there is little time wasted in replacing a departing student. The principal is obviously in a good position to do the screening, knowing both the student’s academic and social performances.

Part time employees should not be disregarded in rounding out your staff. It is a great way to maximize use of limited office space. As well, one can access over qualified and competent employees who may only be available on a limited time basis.

If you have more time than money, and are prepared to work and train a student, there are various colleges with clerical legal programs that offer placements to help staff your office. This can also be a great way to find future employees.

Others recommend off-shore employees which is another option that can be investigated.

8. / Use the Best Free Human Resources Website

Our Federal Government through Employment Canada has a website where one can access a free online Payroll Deductions Calculator. This free calculator will figure out deductions the employer should be making, including income tax (provincial and federal), employment insurance and Canada Pension Plan contributions. It will do so for the amount of salary, pension, bonuses, commissions and even retroactive pay entered by the employer. The calculator is user friendly and can be found at https://apps.cra-arc.gc.ca/ebci/rhpd/startLanguage.do?lang=English.

Employment Canada also provides a free employment listing service at www.jobbank.gc.ca. One must first create an account by registering on the site, but there is no cost to do so. Once a position is advertised, it can even be saved, and the posting reused again. As the postings are online, it is very useful for employers in smaller communities to capture as potential employees, individuals moving to that area (who may not be familiar with the local papers, but who would look at the Federal Government's Employment Centre).

Employment Canada as well offers on that site, great information for employers under different sections. The first one "HR for Employers" can be found at www.hrmanagement.gc.ca/gol/hrmanagement/site.nsf/eng/index.html. It allows users to access incentive grant programs, CPP, EI and CRA payroll deductions information. There are also links to Canada Summer Jobs, the Temporary Foreign Worker Program, as well as the Work-Sharing Program. The same page also provides a link to additional information covering the following topics: "Hiring Employees", "Departing Employees", "Training Employees", "Managing Employees", "Payroll/Benefits", "HR Planning" and "Health and Safety". Lastly there is a link for "Employment Standards and Regulations". A "Frequently Asked Section" is also available with useful answers.

These links provide much helpful information. For example, under the "Hiring Employees" section, one is offered assistance on how to write job descriptions, and a sample job description can be viewed.

There is also a link to the National Occupation Classification (NOC) site. The NOC is the nationally accepted reference on occupations in Canada. Organizing over 30,000 job titles into 520 occupational group descriptions, it is used to compile, analyze and communicate information about occupations.

Under the section "Departing Employees" there is information not only on what to do with respect to Employment Insurance, but also exit interviews, Records of Employment, and links to the Career Explorer and the Career Navigator. The Career Navigator includes a number of quizzes, including: the “Abilities Quiz”, which identifies the abilities of the individual taking the quiz and provides a list of matching occupations; the “Data, People, Things Quiz”, which also provides a list of matching occupations based on one's way of dealing with data, people and things; the “Work Preference Quiz”, which again provides matching occupations based on one's work preference; the “Work Values Quiz”, which helps identify the important values in one's work environment.

Lastly it also offers a “Multiple Intelligence Quiz”, which helps ascertain one's style of thinking and understanding; and a “Seeing, Hearing, and Doing Quiz”, which assists in discovering one's style of learning.

These tests are provided free of cost. They are not only useful for departing employees, but may also be of assistance when hiring new employees, or for personal testing. There are many resources offered for learning strategies, depending on the results of the test. In the "Managing Employees" section, performance appraisals and performance problems are discussed.

In all, these links provide an indispensable free resource which should be kept at hand.

9. / Annual Performance Reviews

An employee review does not need to be long. In fact the shorter may be the better. This is a great opportunity to find out the problems that you may not be aware of. It is a good idea to ask what three tasks each staff enjoys and dislikes. This may help you maximize your employees' time and ensuring optimum efficiency.

It is also another opportunity to find out who are the three people your staff would fire if they could. If the same name appears on every one's list, this is someone you should consider eliminating from your practice.

Another good area to investigate would be staff suggestions for improvement, including what tools they would like to have, what ideas they would like to have implemented, and other development opportunities.

10. / Recognize Contributions of Departing Staff

Whether an employee leaves voluntarily or is terminated, that person's contribution and participation in the office should be recognized. The only exception to that rule would be if the employee is terminated for dishonesty, fraud or criminal activity involved.

It is our practice to have a cake and/or a gift for a departing employee, as long as that employee gave us proper notice of their departure.

An employer has to accept that from time to time staff will need a change of employment. We have made it clear at time of hiring that we will be supportive of such moves, as long as the employee provides us with proper notice, and leave their work in order.

Recognizing a departing employee's contributions is not only important for the person who is leaving, (especially if they are being terminated as it allows them to keep face), but it matters even more for those staying behind. You are basically sending a message to the remaining staff that should any of them leave your employ; they too will be treated with dignity if they treat their employer properly.

Usually, our departing employees know that they can obtain references (which should be accurate) and attend interviews during work hours. This avoids the alternative of staff calling in sick for a whole day, when really they only needed an hour or two during the day. When such dishonesty takes place, it often leaves other staff to pick up that employee's work share, creating resentment. Resentment which is compounded should the other staff become aware of the true reason for the absenteeism. Further, this creates a situation of conflicting loyalty, again bad for office morale.

PART B - TOP TEN MANAGEMENT TIPS

1. / Consider the Use of Online Calendars

All lawyers in our firm have access to each other's calendars on line. This means wherever there is internet, (whether at work or home), we can check our appointments, as well as that of our colleagues, without having to make calls to each other's support staff.

2. / Recycle

Recycling is important for so many reasons. Not only are there significant benefits to the environment, it has a positive impact on the bottom line. We encourage our staff to participate in recycling, as this creates a "no waste" climate and atmosphere.

Examples of reusing and recycling include: returning toner cartridge to raise funds for charitable organizations, recycling of paper, reusing of binding supplies, collecting used stamps for a local church, returning flower vases received as gifts to a florist, (who in return will donate a gift certificate to a local charity chosen by staff), using hand towels instead of paper towels, to name a few.

3. / Review Supplier Agreements

There may be some advantages in considering specific suppliers for certain items that you use frequently. For example, our firm will purchase toner from a supplier who specializes in toner supplies rather than from a general office supplier, as the cost differential is significant.

It may also be worthwhile to deal with more than one general office supplier. Have each company provide a "best price" on three items you will regularly order. However having done so, you should once a year review the prices. This allows you to notice if a price increase has crept up over time. This also ensures you are getting the best prices on those supplies which you frequently consume.

Many big suppliers have flyers advertising loss leaders. Take advantage of them. Have a staff review the flyers and alert you to bargains and authorize the staff to order those items directly.

Don't forget to check your "Dollar Store". You would be surprised at what bargain supplies you may find there at great savings. As well, consider buying frequently used items in bulk, if you have the facilities to store them.

4. / Discourage Staff from Hoarding

Periodically have your staff do an inventory of the supplies in their desks. Your staff's desk drawers may reveal considerable stocks being stashed away. This may not be done out of ill will, but just to ensure they have the supplies they want when they need them. However some supplies have a life expiry (glue sticks, liquid paper etc.) and unnecessary hoarding may lead to excess ordering and waste.

5. / Long Distance Alternatives

For those who are not familiar with Skype, it is software available for free on the internet. This can be downloaded at www.skype.com and allows you, through your computer, to make phone and video calls for free to other people who have Skype software. If the person you want to reach does not have Skype, you can still reach them, but will have to pay some minor charges. For example you can pay 2.1 cents per minute on a "pay as you go" basis, or subscribe for as little as $1.09 per month for unlimited land calls. You will need to purchase a headset, but the investment could be well worth it.

For those who prefer using a real phone, Magic Jacks www.themagicjack.ca/howitworks.php is a USB device that connects into your computer and allows you to plug in a regular phone. The device is being sold for $39.99 US plus taxes and shipping, which includes unlimited calls and long distance in Canada and the USA for one year. Thereafter a yearly renewal fee of $19.99 needs to be paid.

6. / Use Your Library

Law library associations are a great repository of information. They also have a network giving them access to other libraries' materials. Do not hesitate to visit yours on a regular basis and check out their new acquisitions. Only purchase material that you really need and borrow the rest.

7. / Office Visa

Consider the use of an office credit card, with an appropriate limit having regard to your office overhead needs. Obviously some caution needs to be exercised as to who has access to the card as abuse is possible. This card can be used to pay for office supplies, court and administration charges. This has the added benefit of cutting down on the number of office checks needed.

The points collected with the cards can be used to purchase additional office supplies. Alternately they can be used to purchase items that can be given to office staff, creating an added perk at little or no cost to the employer.

8. / Get Taxes Applicable to Retainer

With the upcoming HST, lawyers in Ontario are now looking at taxes of 13%. This means that a retainer of $1,000.00 will likely attract taxes of $130.00. If you are arranging for a retainer of $1,000.00, consider collecting the $130.00 in taxes at the same time, by asking for a retainer of $1,130.00. This should eliminate the tax bite on your retainer that would otherwise take place.

9. / Consider Buying Equipment at the End of Lease

Many lawyers will lease equipment rather than making an outright purchase. The main reason for this is that lease payments are usually 100% deductible while the cost of purchase is depreciable on a lesser scale.

Some leases allow you to purchase the equipment for fair market value at the end of the lease. If you know the equipment has been well maintained (and you should know since it has been in your office the whole time), it may be worth considering its purchase. While you may eventually replace it, this will result in a few months or a year of no lease payments. If you are not making lease payments, your sale rep will be anxious to provide you with an attractive purchasing opportunity. Further, and a trade credit for the equipment you bought out, may even be available on your next acquisition.

10. / Close Office to Clients for a Day

Occasionally closing your office to your clients is an excellent opportunity for your staff to reorganize their environment for the better. When doing so, we allow staff to ”dress down”, and order take out food for everyone. This creates a great bonding opportunity. The change of pace (and reorganization resulting from that day) should create great potential for increased efficiency.

As long as the clients are notified in advance, (a sign in the door a month in advance should provide ample notice) there should not be any perceived dissatisfaction at the client service level. In any event, you are still present on the premises for emergencies.

PART C - TOP TEN MARKETING MANAGEMENT TIPS

1. / Ascertain Your Referral Sources on Intake

By adding one line on any New Client Intake sheet it is easy to establish who your main sources of client referrals are. This information is very useful. For example, if none of your new clients are finding you from the Yellow Pages, you may wish to rethink that source of advertising.

2. / Acknowledge Your Referral Sources

Once you have identified your sources of clients referral, do not forget to thank them. At the very least, send a Thank You note. A bottle of wine or liquor works as well. Christmas cards are another opportunity to acknowledge those who have sent you work. If you have entered into a referral agreement with another lawyer, you must honor same. Failure to do so is improper at the very least, not to mention that it will cause the source of referrals to dry up, and your reputation will suffer.

3. / Every Contact is a Marketing Opportunity

Every potential employee, service provider, supplier, client and individual that you meet is a marketing opportunity. To that end, treat everyone with respect as you are an advertising banner for your firm, partners and associates.

Do not forget to thank your clients for choosing your firm and trusting you with their important matter.

4. /Get a Website

Everyone needs a website. The internet is part of the new reality of any practice. To that end, the Ontario Bar Association has come up with a new complimentary service for its members. They have created the OBA Law Site. A simple and easy tool, it allows its members to create their own websites using a set template. In just five easy steps any member of the OBA can be online, marketing their expertise to thousands of potential clients in their community, across the province and across the country. There is no need to hire a web site designer and programmer to get you online. If you have your own ISP host there is no fee, otherwise you may access the services of OBA's ISP partner at a reasonable monthly fee.

5. / Get a Social Internet Profile

Create a Facebook page, LinkedIn page, Blog – anything to get you on line. The use of the web is increasing exponentially, not only by your clients, but by your colleagues and competitors. The greater your presence on the internet, the better likelihood search engines will find you.

6. / Buy Your Own Domain Name

Even if one does not plan on operating one's domain name, it should be purchased. This is mandatory if one has an unusual name, as potential clients will assume that what they find "Googling" your name actually relates to you.

It is not expensive to buy one's domain names. The site www.10dollar.ca allows you to purchase your domain name ie. www.yourname.ca for $10 a year plus tax, and www.yourname.com for $13.06 per year inclusive of tax.

7. / Donate a Scholarship to a Local High school

Most high schools offer a law course. It is well known that the costs of university educations are rising faster than inflation, and scholarships are few and far between. Offering a scholarship to the student with the best grade in the law class is an inexpensive way to acquire favorable publicity, and goodwill with the principal of that school.

8. / Silent Auctions Donations

In these days of cutbacks, many charities are holding events with draws, or silent and live auctions to generate funds. This is a great opportunity for you to part with items (in new condition) that you have no use for. You may even get a tax receipt for those donations. Alternately, if you have no such items to donate, you can always donate legal services.

For example, donating a certificate for a free power of attorney for property is a good way to get your name out to all those attending the fundraiser. It is also true that a significant percentage of gift certificates are never redeemed (in which case there is truly no cost at your end in offering the certificate). Even better, the buyer who buys your power of attorney certificate may end up paying you for a will. A word of caution, (if the legislation in your area allows you to do so), put an expiry date on your certificate i.e. must be redeemed within 6 or 12 months.

9. / Establish a Presence in the Media

Consider writing legal articles in areas that interest you. These could be aimed at the general public and/or the profession. This will help assist you in establishing credibility in your preferred areas of expertise.

Offering to provide educational seminars with local community organizations is another way to obtain free publicity while rendering a public service.

10. / Rotate Charitable Commitments

Charitable involvement is important at many levels. For those who are establishing new practices however, you may wish to limit your board involvement so as to allow you to rotate through a number of organizations thereby maximizing your firm's exposure.

Alternately, nothing prevents you from being involved with an organization without being on its board. One can also agree to assist with legal services on an "as needed" basis.

PART D - TOP TEN CLIENT MANAGEMENT TIPS

1. / Do Not Answer the Phone After Hours

Answering phone on weekends (or after hours) makes it very difficult to establish any kind of "work/personal life" balance. If you train your clients that you are available at all hours by answering their calls at all hours, you have no one to blame but yourself, when you find out you are constantly being contacted after hours.

Granted there will be times when you need to speak to your clients after hours. WIth call display now available, it should be easy to monitor the calls that are taken after hours.

2. / Do Not Immediately Respond to Emails After HoursI

Precluding emergencies, instantaneously answering emails will also train one client's to expect immediate responses. This is not always necessary, and again only results in unreasonable expectations from clients.

There are features available on certain email providers which delay the sending of an email response. This may serve to diminish clients' expectations of immediate response when same is not necessary.

3. / Do Not Give Out Private Contact Info

There are few things that a lawyer can do for a client after hours. Giving one's clients access to one's private life after hours can be a license for that client to abuse the privilege. Granted for certain types of practice (such as criminal law) it can not be avoided. However, for many it is not necessary for clients to be able to contact us at all hours. It is difficult enough to attempt equilibrium of work and personal life in this business. Therefore, think twice before handing out your personal contact information.

4. / Remember the 20/80 Rule

There is a business rule called the 20/80. It basically stands for the fact that 80% of your income is derived from 20% of your clients and vice versa. This rule can be applied to many things. For example 80% of your aggravation will come from 20% of your clients. Eliminating the individuals who contribute disproportionately to your problems is a wonderful way to reduce the stress of practicing law.

Getting rid of difficult individuals will provide a breath of fresh air to your office. It is our office's policy that rudeness from anyone, including clients, will not be tolerated. While it is understandable that clients involved in litigation may be under stress, apologies will be required for any inappropriate outbursts.

You will gain additional respect from your staff, if they know that you will protect them from abuse.

5. / Do Not Get Hired by Bad Clients

If a client becomes argumentative or rude in the first interview, rest assured that their behavior will not improve with time. You are better at expending your energies on good clients, are not working at all than working for difficult, unappreciative and rude clients – especially if they do not pay their bills. Do not tolerate abuse.

6. / Do Not Provide Free Legal Services

The danger with providing free legal services is that the recipient may not value your time appropriately. Further there is a danger of continued expectations of free services not only by that client, but by their friends that they will refer you to.

Our policy is that if we can not help the client, we will not render an account for our time. This is a better way to deal with initial appointments from potential clients. There is value in rendering minimal accounts. If the client does not pay them, the embarrassment of having an outstanding account will prevent them from returning to your offices to bother you for more free legal advice.

Request a donation for charity, if for some reasons you do not feel the services rendered are worth the administrative demands of an invoice. Other firms will accept a donation to their “Staff Lunch of the Month Fund”.

7. / Do Not Make House Calls

Unless you have a witness with you, and your client is prepared to pay the additional time and expenses incurred, do not go to client’s residences. In particular, prospective clients who expect you to travel to their home on the first appointment will continue to expect you to do so for all future appointments.

Obviously there are exceptions, such as if your potential client has mobility issues (i.e. is hospitalized). There may be times when it can not be avoided, but think long and hard as to whether you really need to do so, and whether you are prepared to meet the continued expectations that have created.

8. / Do Careful in Being the 2nd or Maybe 3rd Lawyer

While there are again exceptions to this rule, they should be few and far between. The client, who has had 4 different lawyers before you, will not be happy with your services regardless of any miracles you may perform.

The reality is that that type of client will usually carry and transfer to you all disappointments previously experienced, while maintaining the unreasonable expectations seeded by the prior counsels (despite the fact they were unable to deliver same). It is a “lose-lose” proposition.

9. / Don’t Set Up Unreasonable Expectations for Clients

The first appointment is an opportunity to set up the rules of engagement. Do let your client know of your policy with respect to missed appointments, returning of calls, retainer, reporting, and ultimate fee arrangements upon completion of the file. This should be confirmed in a detailed follow up letter.

In addition to these preliminary matters above, you should fully discuss the client’s expectations and your ability to meet them to avoid problems. Remember that it is said: “one happy customer tells two but one unhappy customer tells ten”.

10. / Take a Holiday

It is amazing how one’s productivity can be increased after a short break. Looking at the fish bowl from the “outside-in”, often allows us insights as to how we can be more efficient, productive and have a better life quality. It allows you to recharge your batteries.

While away, it is important to have a system to handle calls and mail. For example, correspondence should be sorted between important and non important. The important stack should be further arranged by your staff so that the most urgent correspondence is the first you see.

During your absence, letters from opposing counsel should be replied to, advising of your absence, and if appropriate, forwarded to your client. A vacation email reply should also be arranged, especially if you will have limited access to the internet.

And most of all, rest and relax!