Automate and Simplify Your Law Practice Worksheet

This worksheet will give you a better idea of areas of your firm that could benefit from simplification and automation. This worksheet should be done over time, ideally over a few weeks. The first phase will ask you to document the things you do every day in your law firm so that you can identify opportunities for streamlining your workflow and automating tasks. Complete this yourself, and if you work with others, have them complete this worksheet as well. The last three phases of the worksheet will include specific areas for organizing your work, brainstorming ideas, and coming up with a plan of action.

Phase I: Assessment

Keep track of everything you do over the course of one week using this log. If you use a timekeeping tool, plug in everything that you accomplish here. The time sheet alone will not suffice, though. Don't forget to track the little things that you may not normally think of or track, like phone calls, photocopying, email or mailing, getting organized, staff meetings, client meetings (and the time it takes to coordinate them), to name a few. Get as detailed as possible. For example, if you're spending time drafting a document, what kind of document is it?

Day 1	
Day 2	
Day 3	
Day 4	
Day 5	

Phase II: Organize

Now that you're done tracking everything that you do during a typical workweek, it's time to organize these logs into "Areas of Work." Create titles or groups for each area, and place your activities from the past week under each title or group. Start with these suggested areas, and create some of your own. If there is something that is part of your job that you may not have logged above, go ahead and plug it in here. If you work with others, it may be helpful to collaborate with the entire firm for the next few phases.

Documents	Emails	Checklists
Billing	**Getting Organized**	**General Office Work**
Workflows	_____	_____
_____	_____	_____

Phase III: Processes and Tools

See which Areas of Work have repeated tasks that could benefit from a streamlined process or a tool to make your life easier. What are you doing repeatedly? What's taking you and your staff too long? Anything you touch twice needs a moment of your consideration. List your problem areas out in a statement. Address each statement with a solution (tool, improved process, etc) that will alleviate the burden of that area of work. The solution should save time, simplify the process, standardize the process, and should be better than what you've been doing.

Ex:
Problem: *I spend too much time printing invoices, stuffing envelopes, stamping them, and sending them to clients.*
Solution: *Use a batch billing tool, and transition clients to email invoices. Give clients the option to pay using credit card or e-check.*

Problem: *I spend most of my week preparing the same 5 documents for filing.*
Solution: *Create form documents and start using a document generation tool to get a good first draft.*

Problem: _____
_____

Solution: _____
_____

Problem: _____
_____

Solution: _____
_____

Problem: _____
_____

Solution: _____
_____

Problem: _____
_____

Solution: _____
_____

Phase IV: Implementation

Now that you've identified some solutions to your problems, it's time to put a plan in place. For each project you decide to undertake, you need to assign an owner to that solution (you, a staff member, a consultant), set a goal that you'd like to accomplish, and set a deadline for implementation. After some research into solutions, you will be able to allocate an accurate budget of money, time and resources to this implementation.

Ex:
Solution to be Implemented: *Practice Management Software*
Goal: *Have one place for generating and storing documents, time and billing, matter templates for repeated workflows, and automated rules based calendaring*
Owner: *Sally Jones*
Implementation Deadline: *December 31st, 2017*
Budget: *Monthly cost of $xx per person.*

Solution to be Implemented: _____

Goal: _____

Owner: _____

Implementation Deadline: _____

Budget: _____

Solution to be Implemented: _____

Goal: _____

Owner: _____

Implementation Deadline: _____

Budget: _____

Solution to be Implemented: _____

Goal: _____

Owner: _____

Implementation Deadline: _____

Budget: _____

Solution to be Implemented: _____

Goal: _____

Owner: _____

Implementation Deadline: _____

Budget: _____

Parting Words

Keep in mind that there will be a bigger time investment up front to address some of the problems you identified. You will need to spend time, money and resources to simplify your day and automate processes. There will be changes to your workflow and old habits, and sometimes there will be a learning curve. Remember that this is worth it, and you'll be saving time and money in the long run. Don't be afraid to come back to this and refine some of the processes or tools you implement as you work with them and learn more.