LAW OFFICE MANAGEMENT

An Ounce of Prevention . . . Concluded!

by Janean S. Johnston

The last installment of this series is about first impressions. If your firm and its members do not create a good first impression with potential clients, you may never be able to use any of the procedures—such as docketing and calendaring, conflicts checking, file management, and trust accounting—that were highlighted in earlier articles.

First impressions are created from the moment a potential client has contact, directly or indirectly, with your law office. Creating a positive impression depends upon the efforts of every member of the firm. Everyone—the receptionist, the secretary, the paralegal, the attorneys—must ensure that all client encounters are handled professionally and efficiently. If this first impression conveys competence, concern, and respect, your firm's client base will grow accordingly.

Is your firm creating a good impression on potential and current clients? The questions below will give you some excellent clues.

First Impressions

1. Does your firm have an adequate number of phone lines so that calls are answered without delay?

2. Does your staff make a positive, professional impression when answering the phone? (If you don't know, call your office when you are on vacation or at court.)

3. Does your staff avoid putting a call on hold for an unreasonable time?

4. Does your staff give the caller a chance to respond before shifting him or her to voice mail?

5. Are callers told approximately when their calls will be returned by the lawyer if they are not handled immediately?

6. Is your staff careful not to screen calls too aggressively?

7. Does your law office give a professional appearance, inside and out?

8. Do you or the receptionist greet clients promptly, pleasantly, and professionally?

9. Is the reception area neat and clean, with adequate space and comfortable chairs?

10. Is the reception area visible to the receptionist, so that all waiting clients and activity can be monitored?

11. Does the reception area contain current and relevant reading material?

12. Do all law office personnel present a professional image of the firm and treat clients with courtesy and concern?

13. Is your staff careful not to discuss confidential client information where the conversation can be overheard by other clients?

14. Are all legal questions, including why the potential client wants to see the lawyer, discussed in private, out of the hearing of others?

15. Are all billing matters discussed privately, where others cannot hear the discussion?

16. Does the firm have written materials available for clients that explain the firm's services, appointment procedures, billing practices, and other pertinent administrative practices of the firm?

17. Does the firm have a client complaint procedure that encourages the documentation and resolution of all client complaints?

18. Are all clients seen within thirty minutes of their scheduled appointment?

19. Are clients informed if their attorney is running late and given the opportunity to reschedule the appointment?

20. At the end of the representation, are clients encouraged to give constructive feedback to the firm regarding their level of satisfaction with the services provided?

If you have any questions after answering the questions above, please contact me at (703) 567-0088.

If you would like to have a private assessment of your law office practice on-site, please remember to call and indicate your desire to participate in the Virginia State Bar's Confidential Law Practice Management Review program. I am scheduling appointments for next year and will be happy to send the application materials to those firms that are interested. In the meantime, stay tuned for future risk management advice, and stay healthy!