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### Building a Law Office

The mission statement of this firm is to “provide professional legal services to our clients in a manner that supports the elements of communication, integrity, commentary, and fee fairness”. The structure and organization of this law office will be supported by a staff consisting of one senior partner, six associate attorneys specializing in the areas of real estate, probate, civil litigation, and contract law, three paralegals trained and certified in these specialty areas, one office manager, one office clerk, one receptionist, and one marketing manager. This firm will operate under a democratic management style. All casework will be reviewed by the supervising attorneys and the senior partner will ultimately make the final decisions regarding the firm’s daily operations. The senior partner, associate attorneys, and office manager will meet monthly to discuss concerns or necessary changes related to client billing processes, adjustments to the billable fee structure, support staff productivity and support, and general firm operations.

Each paralegal will report directly to and perform legal work for two associate attorneys. Their duties will include but are not limited to meeting and communicating with clients, conflict of interest checks, system creation and management of client cases, gathering, analyzing, and processing client case information, conduct investigations, statistical and document research, conduct legal research comprised of case decisions, statutes, and legal articles, draft and organize legal documents, communicating with clients, attorneys, and other professionals about case matters, management of e-discovery, trial preparation, scheduling out of office hearings, meetings,

depositions, and trials, reserving office conference rooms for meetings, hearings, and depositions, supervise work performed by the office clerk, and typing of attorney dictation. Paralegals are supervised by and report to their supervising attorney but all human resources matters are handled by the office manager.

The office manager reports directly to the senior partner and is responsible for managing the support staff, overseeing employee benefit programs, processing payroll, conducting annual employee reviews, conduct monthly employee meetings to discuss changes in benefits and delegation of office tasks, balancing, monitoring, and processing operating and client trust account transactions, balancing client trust account ledgers, processing accounts receivable and accounts payable transactions, client invoicing, adjustments of attorney's billable time, collecting amounts owed to the firm, and the all-inclusive daily functions of the office. The office manager must consult with the supervising attorneys and senior partner regarding all employee hiring, evaluation, and termination processes and attend monthly meetings to discuss office operations, client billing and fee structure adjustments, and support staff productivity and support. All funds received and issued from the firm's operating and client trust accounts are done so by the office manager and with the approval of the senior partner. The case attorney must be consulted regarding all changes to billable fees.

The office clerk's work is supervised by the firm's paralegals but they ultimately report to the office manager. These tasks include but are not limited to the electronic scanning of case documents and correspondence, electronic and in-person filing of case documents, updating case files, locating case files, maintaining the case file tracking system, issuing bar-coded employee badges, barcoding case files, running office errands, maintaining conference room appearance and

restocking beverages and snacks between uses, maintaining office equipment, serving beverages to clients and visitors, and answering phones and taking messages.

The receptionist is responsible for answering the phones, routing calls, taking messages, greet and check-in visitors and clients, maintaining an electronic record of daily visitors, clients, and employees, issue visitor passes and verifying employee passes, ordering the service of beverages and snacks to visitors and clients, ordering food and beverages for the interoffice client and employee luncheons, ordering office supplies, ordering complimentary beverages and snacks, scanning, photocopying, and faxing documents, sorting of incoming and outgoing mail, dropping mail off to the post office, maintain the waiting and lobby areas, and restocking lunchroom beverages and snacks for employees.

The marketing manager shall be responsible for ensuring that the firm represents a steady flow of clients. The duties of this position require the individual occupying it prepare the firm's marketing plan, monitor and update website information, direct marketing advertising and promotional activities, conduct client and entertainment seminars, prepare and update firm newsletters and brochures, assist the firm with targeting a specific market, ensure a positive public perception of the firm, and prepare and analyze client surveys to ensure that the quality of representation and support staff productivity expectations are met.

The firm's fee structure will be comprised of flat and blended hourly fees. Cases warranting a flat fee would include simple preparation of estate planning documents, mortgage and service contracts, association documents, and real estate closings. Litigation cases will require the billing of blended hourly fees. This would evenly distribute the fees and costs charged to the client while litigation is ongoing and ensure the firm's profitability. Medical malpractice and personal injury cases will be taken on contingency with the percentage due to the attorney for fees being based



upon the amount collected on behalf of the client. The percentage collected to cover the fees associated with litigating the matter will vary from 40% for the first \$50,000 recovered, 33.33% of the next \$50,000, 25% of the next \$500,000, and 15% of any amount exceeding a \$600,000 recovery. Costs are billed to the client separately.

If a simple document preparation case evolves into a complex litigation matter, the fee structure will also change from the flat fee structure to blended hourly. Flat fees for the preparation of documents vary based upon the type of documents being prepared. Real estate closings, mortgage documents, and service contracts are billed with a flat fee of \$500.00, while preparation of Association and related documents are billed at \$3,000.00. The blended hourly rate billed to a client for the time of any of the firm's legal professional team members is \$400.00 per hour. This includes associate attorneys and the senior partner. Retainer and fee agreements are signed by each client and the terms of the agreement include a detailed explanation of the appropriate fee structure, the terms upon which the retainer is being collected, and an agreement regarding the confidentiality of case information.

It is the policy of the firm to collect retainer fees for litigation cases only. All other clients are billed based upon the appropriate fee structure. Chargeable refundable retainers are collected from clients only for medical malpractice and personal injury cases. The retainer amount paid is first applied to the client's account balance and if any amount remains once the case has been settled and all costs and fees are paid, it is returned to the client. The firm requires all other litigation clients to pay a nonrefundable and nonchargeable fee to ensure the attorney's commitment to the client's case.

The firm believes that employee support and productivity can be maximized by the implementation of an operating policy describing the role of each attorney and employee, the flow

and delegation of casework, the supporting party to whom a person can go for assistance with a case matter, and the ultimate decision-makers for the firm. This policy will better assist the support staff with managing and keeping track of their billable and nonbillable time. Part of this policy will include the implementation of an electronic file tracking system. This system will reduce the amount of non-billable time that is often spent searching for a file and eliminate the unnecessary stress placed upon support staff in attempting to locate something that is needed immediately. It will also serve as a backup record of timekeeping procedures.

Employee policies will be drafted and each team member and the attorney will be required to acknowledge its receipt upon being hired by the firm. This policy will include a confidentiality agreement requiring the disclosure of potential conflict of interest, a non-compete clause, and the promise to ensure that all information revealed to them as an employee shall not intentionally be disclosed by them to another party nor shall an attempt be made by them to profit from this information during or after their separation of employment. This policy shall also define the unauthorized practice of law, explain appropriate client communications, and clarify what the firm considers to be unethical behavior. With this policy, the employee will receive a copy of the firm's rules of employee conduct and a statement of employee disciplinary practices specifying the degrees of disciplinary action taken against the employee if the firm determines that the circumstances of the situation call for an employee's correction.

The firm's marketing strategy will include obtaining and maintaining several memberships to various networking organizations, reviewing and accepting bids from clients posted on service auction websites, the organization and hosting of promotional activities such as webinars, community sponsoring seminars, serving as the guest speaker at conferences held locally and in designated regions, writing trade publication articles, advertising via social media, websites, blogs,

television, radio, and print. These forms of advertising shall be geared toward attracting the firm's client of interest by appearing to the public as a professional service existing to assist them with a situation requiring legal expertise, legal representation, and or legal intervention.

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