

Firm Practice Issues Check List

Check off the following items you have completed. Save this checklist and check off the others as you complete them.

- General Accounting System
- Trust Accounting System
- Financial Budget
- Insurance
- Licenses
- Accountant
- Conflicts Checker
- Fee Agreements – retainer, flat fee, contingency, hourly
- Collection policies
- Document production, file management and follow up systems:
Consider an integrated accounting and case management program that will include calendaring, contact management, document management, conflict searches and other utilities
- Ethical considerations as they relate to your practice area
- Office systems: Template and form usage, checklist, billing statement, correspondence, bring forward system, time keeping
- File Retention and Disposal
- Technology – computer, lap top, smart phone, tablet, printers, scanners, backup system, software, voice recognition, research, shredder, fax, copier
- Disaster Recovery plan
- Client Development
- Marketing Strategy including need for services
- Website
- Social Media Plan- Blog, LinkedIn, Twitter, Instagram
- Client screening Process
- Competition analysis
- Dealing with difficult clients
- Withdrawal of services
- Employee Issues: Status, Taxes, Deductions, benefits, confidentiality, training
- Delegation and supervision
- Coverage during absence
- Plan for handling growth