Law firms need systems in order to run efficiently

By Christopher F. Earley

"Organize around business functions, not people. Build systems within each business function. Let systems run the business and people run the systems. People come and go but the systems remain constant."

— MICHAEL E. GERBER

Any business must run on systems in order to be efficient. A law practice is no different.

The moment I realized just how crucial systems truly are is when I was able to scale my practice effectively. Systems freed me from having to do all the work myself.

Here are some things to consider as you build out your systems or expand on the ones you already have in place.

Why create systems? Systems bring many benefits, such as increased focus and efficiency for your office. Additionally, they reduce the chances of committing errors or missing important deadlines.

Systems also allow you to delegate work effectively, because the person you delegate to will know just how to do the work the right way every time by following the written system in place. This in turn gives you the ability and the freedom to focus on other things.

Creating the systems. This does take a lot of work, but it is very manageable. An easy way to create systems is to delegate the work to your staff. Have staff members write down how they do given tasks at your office.

This must be in writing because when that cracker-jack receptionist or stand-out attorney leaves (they will), all that knowledge on how they do their job walks out

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the door with them. That way, when a new team member is hired, he or she will be onboarded relatively easily because of the systems that have already been created and broken down by way of manuals and checklists.

This system of creating systems never truly stops and is an ongoing exercise. If you don't have any staff, simply take five minutes each week to write out one system. At my office, we primarily utilize checklists. Checklists, however, can't be too long or else steps can get ignored and missed.

Identify what should be systematized. I believe there should be a documented procedure on how everything gets done at your office. We have a written process on how mail should be opened and sorted, how to greet a client who walks through the door, and how to prepare a client for a deposition.

Those are just a few of the many systems in place at my firm. If something is performed repeatedly, then it needs to be reduced to a written process.

Testing and reinforcing systems knowl-

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edge. At my firm, new team members receive a manual specific to their position. That way, they can reference it when needed.

We also have new team members take an online assessment to show they know their manual and how to perform the things they are expected to do. We use a platform called Trainual for this, but there are other products just like it that serve the same purpose.

If you have other ideas or questions on the topic of systems, please email me at cearley@chrisearley.com or call me at 617-338-7400. I would love to hear from you. MLW