

Contents

<i>About the Authors</i>	vii
Chapter 1 Why Checklists?	1
Why Should Law Firms Use Checklists?	2
Why Do You Need a Checklist?	3
Our Story	3
1. How Checklists Can Help Your Practice	6
1.1 Malpractice Prevention	6
1.2 Ethics and Best Practices	10
1.3 Writing	11
1.4 Training Staff and Related Costs	13
1.5 Don't Take Our Word for It	14
Chapter 2 Creating Checklists	17
Including Checklists in Your Practice	17
2.1 Types of Checklists	18
2.2 Creating Checklists	19
The Lawyer's Guide to Creating Checklists	20
2.3 Considerations for Implementing Checklists	23
Chapter 3 Overcoming Barriers	25
How to Address Barriers to Implementation	25
3.1 Common Mindsets and How to Address Them	27
Chapter 4 An Introduction to the Checklists	31
Practice Management Checklists	32
Practice Area Checklists	33

Appendix A	The Mechanics of Creating a Checklist	37
Appendix B	Additional Resources	41
Appendix C	List of Checklists	43
Checklist 1	Opening a Virtual Law Practice	45
Checklist 2	Foonberg's Checklists of Needs for a New Law Office	47
Checklist 3	Answering the Phone	51
Checklist 4	Intake Procedure for the Initial Contact	53
Checklist 5	Opening a File	55
Checklist 6	New Hire Procedure	57
Checklist 7	Termination Procedure	59
Checklist 8	Integrated Technology Services, Inc.; Termination Procedure II	61
Checklist 9	E-mail	65
Checklist 10	Correspondence	67
Checklist 11	Annotated Sample Letter	69
Checklist 12	Upgrading Your Computer Network	71
Checklist 13	ABA's Checklist for Purchasing Software	73
Checklist 14	The Law Society of British Columbia: Cloud Computing	75
Checklist 15	Grammar and Editing	89
Checklist 16	Appellate Brief Contents	93

Checklist 17	Social Security Medical Records Upload Procedure	95
Checklist 18	Litigation Checklist	101
Checklist 19	Document Production Protocol: Bates Numbering	105
Checklist 20	Workers' Compensation Phone Intake	107
Checklist 21	Initial Personal Injury Phone Intake	109
Checklist 22	UNITED STATES COURT <i>of APPEALS for the</i> THIRD CIRCUIT/ REQUIREMENTS for BRIEFS	111
Checklist 23	UNITED STATES COURT <i>of APPEALS for the</i> THIRD CIRCUIT/ REQUIREMENTS for APPENDIX	113
Index		115