Task Management for Law Firms: How to Use Workflows

Task management for law firms is no easy feat. From managing attorneys, demanding clients, and the constant tracking of billable time; it's easy for tasks to get lost in the shuffle.

If you don't have standard practice in place, it's easy for partners and associates to create their own way of completing tasks, even if it unknowingly causes more of a headache for the firm. This variation hammers your firm's utilization and realization rates. As a result, managing partners spend a significant amount of their time on busywork, when they should be focused on growing the firm.

It isn't their fault. It's one thing if the partners and associates knowingly refuse to follow the policies and procedures you've laid out. It's another thing entirely if there aren't any policies and procedures to follow.

What Are Workflows?

What specifically is the phrase "systems management" referring to?

A system is a procedure or method that ensures consistent, positive outcomes. For lasting success in your legal practice, implementing a series of reliable systems is essential. These systems can range from straightforward checklists for associates to sophisticated algorithms for case management.

So, we're talking about a workflow then? A workflow is a series of steps that are required to complete a specific action (i.e., draft a pleading).

Workflows	Systems thinking
Created through systems thinking	Produces a collection of workflows within an organization
Consist of a sequence of steps or processes for specific tasks	Relies on understanding cause and effect (causality)
Depend on system mapping	Uses feedback loops to iterate and improve
Exist as part of a larger system	Creates harmony across multiple workflows

Systems management involves creating successful and efficient workflows. By considering the cause and effect relationships around your desired outcomes, you can develop a series of workflows that consistently produce favorable results.

Without workflows, there are no systems. Without systems, everyone in your organization operates independently, leading to inconsistency and inefficiency.

Why Does Your Law Firm Need Workflows?

Current research shows firms are losing time for various reasons that workflows can help with, including the following issues:

- The average attorney is **only paid for *2.5 hours of work* per day**. That's a problem on its own until you realize the truth about employee labor. When attorneys bill 40 or 50 hours per week, they're *actually* working 60 to 70+ hours per week. A wide gap between billable hours vs. actual hours can be quite frustrating.

- Legal professionals **lose a considerable amount of time** unnecessarily. For example, an IDC whitepaper found knowledge workers *wasted 11.2 hours a week* sorting through document management (DMS) challenges. This whitepaper *calculated the loss at $19,732* per knowledge worker, per year, or a *21.3% loss* in the firm's total productivity. This doesn't include losses from other areas.
- **Firm utilization rates**, a measure of firm productivity and billing efficiency, is stagnant or falling; attorneys are losing a tremendous amount of time due to non-billable administrative work, errors, business development demands and poor planning.
- This has an inevitable and **negative effect on law firm realization rates**. The usual explanation suggests that realization rates are falling due to pricing and billing disputes, which is partially correct. But poor utilization means realization rates take a hit well before billing plays a role.

So how can workflows help fix these problems?

1. **Proper records keeping.** Workflows show you where to look to identify problems. They answer important questions — what needs to be done, who completed what, when it was completed, and where to find the records.
2. **Increased productivity.** With the right workflows, you're able to increase productivity on demand. Incremental improvements to your workflows produce an exponential increase in productivity. And remember, this increased utilization means increase realization.
3. **Precise resource allocation.** Knowing the who, what, where, and when means you have a clear sense of the resources that need to be allocated to specific matters and projects.
4. **Improved employee morale.** Workflows give your employees the structure they need to exceed expectations. Your employees have a clear sense of the work that needs to be done. There's no confusion about what needs to be done or how to do it. Employees have a sense of fulfillment and purpose.
5. **Task prioritization.** Workflows give you the data you need to achieve economies of scale. You're able to identify work that should be outsourced to a freelancer, given to a junior associate or forwarded to a senior associate. Your team knows which tasks should be automated and which tasks should be sent to a virtual assistant. It's clear, precise and efficient.

These workflows are the foundation. They run your law firm, eliminating the need for micromanagement. Workflows reward you for working **on** your business rather than *in* your business. The better you are at doing this, the easier it is for you to achieve high growth on demand. This is how high growth firms maintain their exceptional track record.

Examples of Law Firm Workflows

Don’t forget, you need these workflows, whether you’re an associate, partner or owner of your own firm. If you’re the owner of your law firm, you likely need them all.

Service workflows	**Business development workflows**
Practice management	Marketing and advertising
Project and task management	Content development (video, audio, speeches, etc.)
Time tracking	Sales funnels and lead nurturing
Service inventories	Digital and offline media plans
Client management	Firm reporting, business and marketing analytics
Document management tools and protocols	CRM tools and workflows
Proprietary methods and trade secrets	

Security workflows	**Financial workflows**
Security policies	Billing and invoicing
Data, application and security plans	Payments (online and offline)
Cybersecurity insurance	Pricing and fee structures
Breach incident response plan	ePayments
Emergency and disaster recovery plans	Bookkeeping and accounting workflows
Physical and cybersecurity protocols	Payroll reporting and withholding
Data management (backups, storage, archiving, etc.)	Budgeting and forecasting
Internet, intranet and email management protocols	Securing and managing growth capital

User rights management

Client service workflows	Human resource workflows
Client response protocols (phone, email, text, etc.)	Hiring methodologies (i.e., Topgrading)
Client intake procedures	Recruitment and retention plans
Discount, write-down and write-off protocols	Talent pool (freelance, contract, employee)
Scheduling appointments and events	Employee training
	Benefits and payroll procedures

How do you go about creating these workflows and setting things up? It’s difficult to set things without a plan, but that’s exactly what you need right now.

How To Create Stable Task Management for Law Firms With High-Performance Workflows

How do you go about creating workflows?

1. Set specific goals and objectives
2. Outline your available resources
3. List all of the tasks that need to be completed
4. Create a list of employees/roles accountable for each task/step
5. Create a workflow diagram or mind map
6. Train your employees in the new workflow
7. Deploy your new workflow
8. Analyze workflow performance
9. Iterate and improve

1. Set specific goals and objectives

Specificity and simplicity are key here when it comes to task management for law firms. You’ll want to avoid creating broad or vague goals and outcomes. You can refer to the table above for a list of the categories you can start with. For our example, let’s use the category “time tracking.” Time tracking is too broad so we need to simplify this a bit more.

Let's simplify it even more: "*filling out your timesheet*."

This outcome is simple, clear and concise. It's also important because the title *is* the goal. This step is important because all subsequent steps depend on this one.

2. Outline your available resources

When you outline your available resources, you make sure your employees have what they need to achieve the desired outcomes. It's no different with our *"filling out your timesheet"* example. Outlining your available resources begins with questions.

- What do they need to produce this outcome?
- What will prevent them from producing this outcome?

Here's an example of the tools and resources your employees would need.

- Cloud-based time tracking software
- A pricing sheet for each employee type (i.e., $360 per hour for this attorney, $150 per hour for this paralegal)
- The desired billing increments/units (i.e., 1/10 of an hour or 6-minute increments)
- ABA/LEDES billing codes and formats

It's a simple and straightforward step that's necessary if you're expecting consistent results from your employees.

3. List all of the tasks that need to be completed

This is exactly what it sounds like. Here's an example of what you might include on a "*fill out your timesheet*" workflow:

- Selecting the correct services
- Setting the appropriate time tracking increments
- Using the right service descriptions
- Entering your time using the correct billing increments

This step is easy, but your approach must be thorough. A missed to-do item affects subsequent steps in your workflow.

4. Create a list of employees/roles accountable for each task/step

Next, you'll want to assign owners to each task. You can assign tasks to specific people or specific roles. You'll need to determine what's best for your law firm.

Every task or step needs to be accounted for. There shouldn't be any surprises. If you need to add more steps, someone should be responsible for them.

5. Create a workflow diagram or mind map

In this step, you're simply visualizing the process as you have it, via a workflow diagram or mind map. Let's say you're outlining the workflow for the preparation of a will or other estate planning documents. What would that look like? Here's an example from Precedent.

A workflow diagram or mind map visualizes the process, giving everyone a bird's eye view of **(a.)** the work that needs to be done **(b.)** The specific steps it will take to achieve the desired outcome. Doing this means it's easier for employees to produce results.

6. Train your employees in the new workflow

When you train your employees, you're outlining the specifics and performance standards they'll need to meet. Training ensures that you get exactly what you're asking for, minimizing accidents, errors, or negligence. This upfront training decreases expenses due to discounting or rework.

7. Deploy your new workflow

Deploying your workflow establishes an important benchmark. You're able to set an important starting point for your firm. It's a good idea to roll things out slowly. Deploy workflows with a small team, or in a specific practice group before making firm-wide changes.

Doing so prevents any major disruptions that come from a poorly conceived rollout.

8. Analyze workflow performance

By documenting the steps in your workflow, you're able to analyze performance, identify failure points and outline possible areas for improvement. Here are some questions you can ask to analyze your workflow.

- Is your workflow working?
- Where are the failure points in your workflow?
- Are things going as expected?
- Is it taking your employees less or more time to complete each task?
- Is the quality of work greater or lower than expected?
- How long does it take to complete a task or goal?
- Where does your law firm's performance fall relative to competitors?

Testing is an important step. A theoretical understanding of your workflow is a good start, but you'll want real-world data on your firm's performance as quickly as possible. This is why it's important to test your workflows immediately and consistently.

9. Iterate and improve

Answers to these questions provide you with clear instructions. You'll have the data you need to make immediate improvements, adjustments and changes to the workflows in your law firm.

The best part about these changes is the fact that you can iterate and improve or rollback changes. You can make firm-wide adjustments or specific tweaks in a small practice group.

Task Management for Law Firms Is Important

Are your partners and associates focused on doing things their own way? It may not be your employee's fault. As we've seen, inconsistent performance isn't always due to noncompliance. It's a lack of systems management.

Using systems and workflows, your law firm can achieve specific, positive and repeatable results. If you're looking to achieve long-term success in your law firm, this isn't optional, it's mandatory. Poor systems management is a disaster for many law firms.

With great utilization, comes great realization. Create the right workflows, apply them consistently. Do what's necessary to create a high growth law firm, and you'll find your competitors become irrelevant.