

Practice Snapshot

Name: _____

Date: _____

Because no two professional settings are the same, it would be helpful if you would outline your practice and the management systems you use to keep it running efficiently, ethically and profitably. Feel free to add comments or additional pages of explanation.

THE BUSINESS OF PRACTICING LAW

1. How many open and active files do you have, broken down by area of law (litigation, corporate, family, etc.) and complexity (simple, average, complex)?
2. Do you feel you have too many, not enough, or just the right amount of files?
3. Do you have Legal Aid files? If so, how many Legal Aid files do you have? In what areas?

4. Do you track your closed files? Where are closed files stored? Do you have a process for destruction of files?
5. Who looks after your LSA accounting records? If this is known to you, what is their level of experience with law firms/legal trust accounting?
6. Where are your LSA accounting and/or file records stored? In the cloud, on a server, or physically?
7. Are your LSA accounting records up to date? What is missing? If you are not in charge of this at your firm, simply write n/a.

8. Are your personal accounting records up to date?
9. Are your firm's annual trust safety filings (Self-Report and Accountant's Report or Electronic Upload) current with the Law Society?
10. Are your government tax files (GST, personal and corporate income tax installments, pay roll remittances) up to date? If not, how much in arrears?

MANAGING YOUR PRACTICE

11. Do you have support staff? How many, what are their positions and levels of experience?

12. Do you use Practice Management software and/or Trust Accounting software (Y/N)? If so, what Practice Management software are you using (Clio, Cosmolex, Leap, etc.)?

13. What other software do you have in your firm, if any?

14. What kind of diary system do you use? Who is responsible for entering and retrieving that information?

15. Are you using a physical calendar or electronic (or both)?

16. Do you have precedents? Are they up to date?

17. How do you perform legal research when you need it? If so, share your preferred platform.

18. What is your plan in case a staff member leaves or is ill for an extended period of time?

19. What is your plan in case you are away for extended illness, short or long term disability (written continuity and/or succession plan with another lawyer, arrangements with your bank and the Law Society for an alternate signatory for your trust account, etc.)? How are you protecting your clients and who will run your practice?

20. Do you have someone to pass files to or with whom to discuss files? Or access to a mentor? When was the last time you spoke about a file with someone?

21. How do you deal with difficult clients or challenging files?

PROFESSIONAL DEVELOPMENT

22. What are your professional development goals this year? How much do you spend in an average year on professional development?

23. Which seminars and conferences did you attend last year? Have you signed up for any this year?

24. What legal professional organizations do you belong to and in what capacity (member, committee member, director, executive)? How many meetings did you attend last year? How many of these were in person?

25. How do you market your practice? Do you advertise? If so, where?

PERSONAL GOALS

26. What does a typical work week look like for you? How many hours do you work on average? How often do you work late into the evening? How many times last month did you work one or both days of the weekend?

27. When and how long was your last vacation?

28. Where and what would you like to be practicing five years from now? What steps are you taking to make that happen?

29. How long would you like to continue practicing? Which of the following best describes the current lifestyle phase of your practice: Start-up? Maintenance? Wind-down? Describe.

30. Do you have any medical conditions that impact your practice?

31. What do you most enjoy about practicing law?

ANYTHING ELSE

32. Is there anything else with which we can help you?

The information provided in this form will be used by the Law Society of Alberta for one or more purposes contemplated by the *Legal Profession Act*, the *Rules of the Law Society*, the *Code of Conduct*, or a resolution of the Benchers and will be accessible to all departments of the Law Society, including the Alberta Lawyers Indemnity Association. The information may be used or disclosed by the Law Society of Alberta, now or in the future, for regulatory purposes, including Law Society of Alberta investigations and proceedings. We may contact you to obtain additional information, or to obtain clarification on the information you provided. Should you have any questions about this, please contact the Privacy Officer at 403-229-4700.