



Identifying the current inefficiencies in your legal services

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This is the first in a series of articles that encourage you to consider how your practice provides your legal services and take up opportunities to innovate. We won't look at how to improve the legal content in your services. We don't need to, you're a good lawyer. Instead, we'll look in depth into how you deliver those services.

Years ago, I decided that spending long hours in a traditional office environment just wasn't compatible with raising a young family. I looked at the way I was trained to practice as a lawyer, thought about it analytically and changed it dramatically so I could work efficiently and remotely around the needs of my family. It wasn't a quick process, and I refined it over time. With the changes, I saw dramatic improvements in every aspect of my practice.

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We need to look at the legal services your practice offers and make sure they not only provide the outcome that your clients are looking for but do so using an efficient process, so your practice is strong and able to grow over time. We all know that time equals money and wasted time equals wasted opportunities. There is always a time cost to your practice for every legal service you provide. We're not really concerned with how your practice charges for a service, just how much time it actually takes.

At this point you might be thinking that you work very hard and have become very good at providing fantastic legal services. You don't see the need to change because what you do works, your clients are happy and new clients engage you. I don't doubt that you work incredibly hard and do provide fantastic legal services. But the reality is that modern business is moving fast. I can now visit a GP and have my Medicare and private health insurance rebates processed before I leave the medical centre. My accountant can also log in to my accounting software to check on my business accounts without needing to meet with me in person and I can do my banking with a financial institution

that doesn't have any branches. We're here to see if you can identify any current inefficiencies in your legal services so you can consider how to improve the way they are delivered.

The reality is that modern business is moving fast

Let's add some human intelligence by using our legally trained critical analysis skills to deconstruct a legal service for its efficiency.

Take for example preparing a will for a new client. A new client contacts your practice by phone to ask if you prepare wills and how much it will cost. Then you organise a face-to-face meeting at either your office or a convenient location for your client. You meet with the client to go through what a will is and how it works, gather important information from them and ask detailed questions so you can customise the will to meet their individual needs. To reduce risk, you have the client sign your instruction sheet in case they pass before the will is finalised. You then go back to your office to consider all the issues raised by your meeting and the information provided, check the details and draft the will.

You then call the client and arrange a second face-to-face meeting to read the draft of the will. You make any necessary minor changes then and there and go through the signing of the will. If there are any major changes needed, you arrange to meet with your client again after you'd had a chance to draft them. You then provide copies of the will to your client and store a copy in your wills cabinet. Your client either pays your fee at the end of the meeting to sign the will or they pay you by direct deposit later.

Can you identify the time costs of this service?

Every legal service has a time cost associated with it

First, let's consider the time cost of this process from your perspective as the lawyer. You take the first phone call, discuss your services and prices and organise an in-person meeting. Let's say that first phone call takes on average 5 minutes to 15 minutes.

You meet with the client for say 1 hour to provide information, gather information, ask questions and record the essentials on an instruction sheet for your client to sign. You then take say 2 hours over a couple of days to prepare the will. You spend 5 minutes calling your client to arrange a second meeting and spend 30 minutes in the meeting (and more if an extra meeting is necessary). Finally, you spend 5 minutes taking payment and filing away a copy of the will, sometimes more if you need to answer questions about your fees. That's a total of at least 3 hours and 45 minutes, plus travel time if you meet with your client away from where you normally work.

Even if the first phone call to arrange the second meeting and administrative tasks to assist with preparing the will and taking payment were performed by support staff, that is still a time cost to your practice. And this summary assumes that you are sitting at your desk waiting for that first phone call. In reality, you'll either be working hard on another matter, away from where you normally work on another matter or trying to grab lunch on a busy day. It's even unlikely that you'll have 2 hours of drafting time in one-time block in the days following your first meeting and that you'll be available for the next meeting as soon as you've finished preparing the will.

The time cost to you as the lawyer also depends on everything else you need to do

Next, let's consider the time cost of this process from the perspective of your client. Your client makes the first phone call taking between five minutes and 15 minutes. They then need to gather all the information you asked for (say 30 minutes) and travel to your office or wait for you at another location to meet for one hour. They take your second phone call for five minutes and again travel to your office or wait for you at another location to meet for 30 minutes. They'll then spend either 5 minutes providing payment after the meeting or another 5 minutes to pay by direct deposit later. That's a total of at least two hours and 15 minutes.

The time summary for your client assumes that they have nothing else to do but focus their entire attention on obtaining your service and be ready to proceed whenever you are. In reality, your clients may be very busy people, with their own work, family and other commitments taking time from their day. They may have had to wait hours or days for a break to be able to call you during your business hours. To gather the information you need, they may have had to ask

for help from a family member to look through their files or made sure they accessed and printed each document. For the first meeting, they may have had to take time off work, find a babysitter or overcome other challenges to travel to the meeting during your business hours. They may not have been able to take your phone call and waited another day for a chance to call you back. Then they would have had to arrange to travel and meet with you again and either pay before they left or arrange to pay later (which might involve a trip to the bank rather than internet banking).

The time cost to your client will also be impacted by their work, family and other commitments

Looks reasonable given the work you're putting in, right? Keep in mind the efficiency of the services that your client receives from other businesses. We know that comparing different services is like comparing apples with oranges. But remember to focus not on the outcome of the service but the process in delivering it. Consider the services you receive from other businesses each week. How do each of your services compare?

Book a time in your calendar outside of your normal hours of work to identify the inefficiencies in each of the legal services that your practice provides. This can be a weekend or early morning before the normal work day begins, so you won't be distracted. For each legal service, record what the outcome is that the client expects and the process you currently have. Record the time costs for each step along the way. See if you can identify all the inefficiencies in the process. Remember to consider the time costs from the perspectives of both your practice (you and any support staff) and the client. We'll use this information when you read the next article in the series in the next edition of *Balance*.

Can you identify the inefficiencies in your legal services?

In the meantime, you're welcome to join our community group for legal professionals who have an interest in being innovative in legal practice. The group provides opportunities for collaboration, connection, exploring and sharing with likeminded legal professionals. See more at <https://www.supportlegal.com.au/community-groups/> ■

Contact Deborah

Would you like input into our next article? We'll be looking at challenging our ideas of client expectations. Please send me an email describing a typical client and the legal service they receive from your practice. I'd also like to know each step in the legal service and the time costs that you've identified. Email me at: deborah.vella@supportlegal.com.au

