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# LAW OFFICE MANAGEMENT FOR PARALEGALS



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# **LAW OFFICE MANAGEMENT FOR PARALEGALS**

Jonathan Lynton  
Donna Masinter  
Terri Mick Lyndall



LAWYERS COOPERATIVE  
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## FOREWORD

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When Donna Masinter first approached me about writing a foreword for this book, I thought that it would be simply another law office management book for paralegal students. That is, an overview of file management, billing techniques, office decorum, and tips on dressing for success. What a pleasant surprise it was to see that this book provides so much more.

*Law Office Management for Paralegals* is the first book that I know of that addresses the role of the paralegal in today's modern law office. This book finally addresses the full array of challenges and opportunities facing paralegals in their professional lives. I found the chapters on "Coping with Stress," "The Art of Communication," and "Professional Development" to be particularly useful and reflective of the maturity of the paralegal profession. I also felt that the emphasis placed by the authors on malpractice avoidance as an overriding concern of modern legal practice is highly appropriate. As full members of the legal team, paralegals must understand the potential that their actions have for contributing to malpractice situations and how to avoid such situations. I also found the author's emphasis on ethics and professional responsibility timely and a helpful contribution to the book's overall theme of professionalism for today's paralegal.

Of course, many of the usual subjects are also discussed in this book, such as law office structure, time records, and computers in the law office. These topics, however, are covered in greater depth than in most such books, and the information provided concerns the latest techniques for law office management. Introducing the paralegal to zero-based budgeting and management of law firm growth was particularly interesting and unique.

In short, I found *Law Office Management for Paralegals* to be an indispensable tool for those educators who are truly interested in preparing their students for the realities of today's paralegal practice.

Albert Greenstone  
President, The National Center for Paralegal Training  
Atlanta, Georgia  
April 1991

## PREFACE

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*Law Office Management for Paralegals* is a practical textbook designed to familiarize paralegals with their roles, activities, and responsibilities in the workings of a law office. Paralegals need to understand and appreciate more than the technical components of paralegal work; they need to understand the context in which their skills fit and the organization of which they are a part. It is essential that today's paralegals understand law office management in order to take advantage of the tremendous opportunities available to them. Only by combining technical paralegal skills with the organizational, administrative, and professional skills necessary to succeed in the contemporary law office can the paralegal truly be prepared to succeed in the workplace.

The purpose of this book is to give the student a comprehensive introduction to the different facets of law office management by integrating practical examples, case studies, and applications with the explanatory material. The student will be exposed to each of the major areas of law office management, and each section is tied together by the most important theme for law offices of the 1990s: malpractice avoidance. Effective law office management goes far beyond efficiency and organization; it also includes a sensitivity to the ethical and legal parameters that define legal practice. *Law Office Management for Paralegals* not only explores this important dimension in general, but also provides unique "On Point" case studies in each chapter that relate malpractice avoidance to the themes and processes discussed in that chapter.

Each of the four major sections of *Law Office Management for Paralegals* introduces the reader to related groups of office management systems. By the completion of the book, the reader will have gained a thorough understanding of law office management and will be prepared to be an effective and productive contributor to a law office.

Section 1, "The Legal Process and the Law Office," introduces the reader to the various realities of working in a law office. This section will help the student learn about the realities of paralegal work and the structure of the legal profession, areas that are frequently neglected in paralegal education and areas which are essen-



tial for the paralegal to understand if he or she is to be an involved contributor in the law office. Chapter 1, "The Work of the Paralegal," uses interviews with actual paralegals to introduce the reader to the work opportunities and activities that characterize paralegal work. By starting with paralegal work, the book's orientation becomes clear: The perspective is that of the paralegal. Chapter 2 introduces the reader to a major unifying theme of the book, malpractice avoidance. This chapter orients the student to the many different dimensions of malpractice, from how it is committed, to its repercussions, to its avoidance. This featured emphasis on malpractice contributes to the practical orientation of the book; it also imparts the serious consequences of legal work and unites the disparate systems and processes discussed in the book by relating them to malpractice avoidance.

The third chapter in this section introduces the student to the vocabulary used to describe and define the types of law firms and the positions commonly found in law firms. It also acquaints the student with the real workings of a law firm by describing both its activities and its economics. This chapter provides an acculturation into the world of the law firm and an introduction to the vocabulary that is used to describe the structures and people in a law firm. The final chapter of the section concerns law firm growth. By introducing the student to marketing, strategic planning, and the trends that will characterize the law firm of the future, this chapter broadens the paralegal's perspective of paralegal work. The chapter shows how paralegals can contribute to law firm growth by being an active participant in the marketing effort and preparing for future developments through awareness and continued education.

These four chapters lay the foundation for effective law office management for paralegals. They provide the information and perspective that enables the student to understand the context for and the reality of being a paralegal, both in the law office of today and in the developing law office of the future.

The second section of the book, "Law Office Administration," describes the major systems used in the actual administration of a law firm. In addition to being introduced to these systems, the student will apply the systems to actual clients described in the "Problems & Activities" section of each chapter. By complementing the theoretical knowledge with actual applications, the student will gain a highly practical understanding of the major systems used in the administration of a law firm. Chapter 5 introduces the student to the general idea of systems in an office, and the following four chapters in this section each concern a specific administrative area. Chapter 6 concerns accounting systems and covers both manual and computerized accounting systems. It also introduces the student to zero-based budgeting. Chapter 7 focuses on time manage-

ment and its tremendous importance in a law office. The student is introduced to different methods of thinking about and documenting time; charts and examples illustrate timekeeping methods. Chapter 8 describes records management, and takes the student through the actual process of opening, maintaining, and closing a file. Chapter 9 examines the library, one of the key resources for a paralegal, and describes other office management systems such as office manuals, mailrooms, and other support systems. Through this section, the student will gain exposure to all of the administrative systems used in a law office, and, by doing the problems and activities in each section, will apply the systems discussed to actual clients. Additionally, the theme of malpractice avoidance runs through this section to emphasize that the systematic administration of a law office is one of the most important ways to avoid malpractice claims.

The third section of the book, "Computers and Technology in the Law Office," features a thorough discussion of technical applications found in the modern law firm. The successful paralegal must be aware of and use numerous technical applications and equipment, and this section features a comprehensive introduction to the various technical systems that a paralegal might be exposed to. Chapter 10 provides the foundation for this section by describing the relationship between paralegals and computers as a working partnership. The following three chapters discuss the major technical systems found in a legal practice: word and data processing, telecommunications and office equipment, and technical systems and applications designed for legal work. This detailed exposure to technical applications is a tremendous benefit to the paralegal because of the high degree of automation found in the contemporary law office. The successful paralegal of the future must not merely be able to use existing technology; he or she must also be willing and able to learn new applications as they are developed and used. This section imparts both the knowledge to use technology productively and the motivation to see technology as an integral part of the work of a law office.

The final section of the book, "Professionalism," complements the book's preceding focus on law office systems with an exploration of the systems an individual paralegal will use to develop his or her professional identity and abilities. Chapter 14 introduces the student to the highly important area of legal ethics, oriented to the specific ethical issues that the paralegal most frequently faces: giving legal advice, maintaining confidentiality, and avoiding conflict of interest. This emphasis on professional responsibility, combined with the theme of malpractice avoidance, sensitizes the student to the ethical parameters that define the realities of paralegal work. Chapter 15 describes achieving professionalism through communi-

cations. By understanding general principles of effective communication as well as specific communications issues that arise in the course of legal work, the student will learn how to communicate effectively with other paralegals, lawyers, and clients, and how to avoid the errors and misunderstandings that so frequently arise in human communication. Chapter 16 looks at the professional's ability to handle stress effectively. The student learns about the sources of stress in legal work and develops strategies to cope effectively with the stress that accompanies the hectic pace so frequently found in law offices. Chapter 17 concerns professional development. It takes the student through an actual paralegal job search and features examples of resumes and a detailed examination of all phases in the job search. The student is also introduced to the idea that professional development requires the continued learning of new skills and knowledge, and the text encourages the student to develop his or her career potential through professional development.

*Law Office Management for Paralegals* is an indispensable guide to the office systems that create the context for paralegal work. Only by learning about the realities of working in a law firm and the methods through which the work of the law can proceed in an efficient, profitable, and ethical manner, can the paralegal truly be prepared to be a productive member of the legal team.

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Donna Masinter  
Atlanta, Georgia

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## DEDICATION

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We dedicate this book to our spouses, those most special people in our lives whose love, friendship, and support have nourished and sustained us:

Kim Lim Sang  
E. Michael Masinter  
Michael Lyndall

This book is also dedicated to the memory of Alexander:

“ . . . little else of life should we demand  
than the fortune such friendship as ours to find.”

# INTRODUCTION

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We welcome you in your quest to learn about an essential yet often neglected area of paralegal education, that of law office management. Paralegal work exists in the context of both the legal process and the law office, yet too often paralegals mistakenly believe that their work is limited to the specific activities a paralegal is trained to perform. What is true is that a paralegal is a highly valuable member of a legal team, whose responsibilities extend far beyond technical paralegal skills to include, among other things, keeping time records, meeting billable hour requirements, managing records, maintaining a zero-based budget, resolving ethical conflicts, and pursuing professional development. These activities provide a context in which paralegal work fits, and, without the ability to manage yourself and your work in a law office, it will be difficult for you to perform your work well or to be prepared to take advantage of future opportunities.

This book will help you learn about the systems used in law offices, and you will appreciate that only through a systematic approach to managing the activities of a law office will you be able to achieve the level of efficiency and professionalism that must characterize legal work. We have tried to cover all of the systems and issues that you will encounter in the process of working in a law office to give you a comprehensive overview of what to expect. We have also tried to write our ideas in a clear, easy-to-understand style so that the reading is both informative and enjoyable.

The textual material is complemented by many illustrations, case studies, and examples that will make it easy for you to relate the ideas to the actual reality of working in a law office. Additionally, we cover issues such as malpractice avoidance, ethics, stress management, and effective communication techniques, topics that are universally seen as critically important, yet topics that are frequently not covered by other texts. Taken together, the features of the book are intended to give you information that will make you an active, professional participant in a law firm who is well aware of the different systems and skills necessary to achieve success. Equipped with both the skills necessary to perform paralegal activities and the skills necessary to work effectively in a law office, you will be well prepared to achieve excellence in your work and to successfully meet the challenges that your work will offer.



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