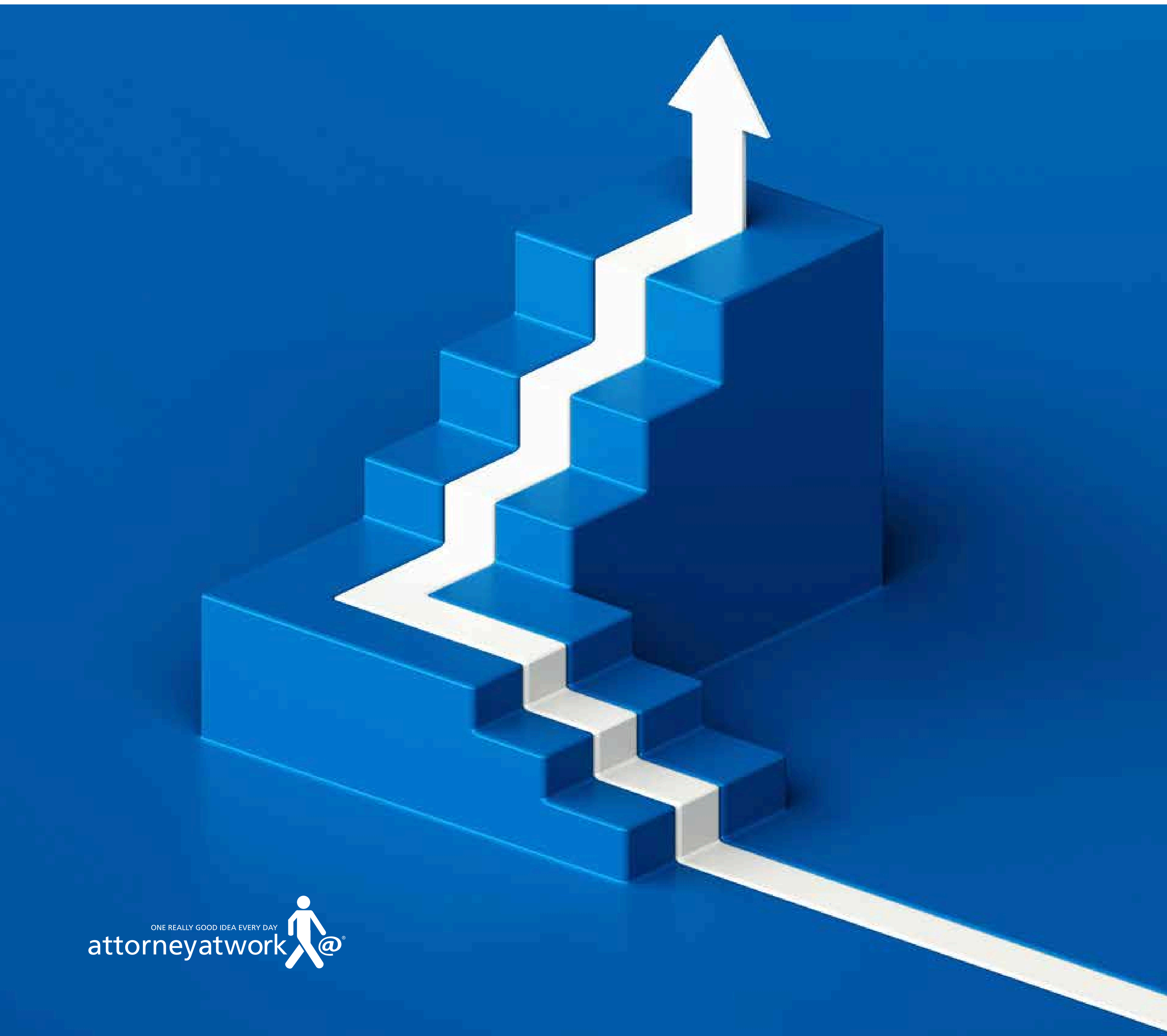
READY, SET, SCALE!

HOW TO SET UP THE SYSTEMS YOUR LAW FIRM NEEDS TO GROW

BY DAVID AND KAREN SKINNER



ONE REALLY GOOD IDEA EVERY DAY
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PREPARING FOR GROWTH, EVEN WHEN YOU'RE BUSY

When your firm experiences a burst of growth, you probably think to yourself, "Finally! This is the moment I've been waiting for." But that excitement quickly turns to frustration when you discover that your current systems can't handle any more work.

Instead of enjoying new opportunities and greater success, here's what actually happens:

- You work long hours to get all that new work done
- But because you're tired, your efficiency drops
- Which means you can't deliver on time, despite your best efforts
- Then your clients get frustrated by slow responses and unexpected delays
- So you just put your head down and work harder. (It's a vicious cycle, right?)

And on top of it all, you're too busy to develop new business. When the work is done and you finally look up, you have no new files coming in.

Sound familiar? We call this the feast or famine cycle.

Ready, Set, Scale! Setting Up the Systems You Need to Grow

What do we mean by systems?

You may be thinking legal tech, but systems are so much more than technology. For our purposes, systems are optimized combinations of people, process and technology that allow you to accomplish tasks in your practice efficiently and effectively.

In this guide, we'll cover what you need to prepare your practice for the growth you want, starting with how systems fuel growth and why you need to invest time creating them — even when you're busy.

You can't scale your law firm business without systems, but when you're working all hours, you may feel like it's not worth investing time to create those systems. But it is, and here's why.

To end the cycle, balance your workload and ensure you don't burn out, you need systems designed to support growth.

Systems Save Time

If you don't have a system or process for something you do more than once, you're leaving money on the table.

Without a system, tasks take longer than they should. You may not remember exactly how you did something last time, so you waste time trying to remember or you make a mistake and have to start over. You may try to delegate it to others, but without a process to follow, it takes too long to explain what to do. People interrupt you with questions or return low-quality work, so you spend time correcting it. All of that is time, energy and effort you could put to better use (like business development, higher-value work or just going home earlier).

Systems Increase Efficiency

Efficiency is having the right people doing the right work the right way with the right tools.

Systems empower you and your team to complete work faster and make fewer mistakes because work is standardized and everyone knows exactly what to do next. Systems also make delegation possible. How? Because a good system includes clear standard operating procedures, or SOPs, that provide people with everything they need to complete a task correctly on their own, without interrupting you with questions or returning low-quality work.

HOW LONG CAN YOU WORK ON MAKING A ROUTINE TASK MORE EFFICIENT BEFORE YOU'RE SPENDING MORE TIME THAN YOU SAVE?
(ACROSS FIVE YEARS)

	HOW OFTEN YOU DO THE TASK					
HOW MUCH TIME YOU SHAVE OFF	50/DAY	5/DAY	DAILY	WEEKLY	MONTHLY	YEARLY
1 SECOND	1 DAY	2 HOURS	30 MINUTES	4 MINUTES	1 MINUTE	5 SECONDS
5 SECONDS	5 DAYS	12 HOURS	2 HOURS	21 MINUTES	5 MINUTES	25 SECONDS
30 SECONDS	4 WEEKS	3 DAYS	12 HOURS	2 HOURS	30 MINUTES	2 MINUTES
1 MINUTE	8 WEEKS	6 DAYS	1 DAY	4 HOURS	1 HOUR	5 MINUTES
5 MINUTES	9 MONTHS	4 WEEKS	6 DAYS	21 HOURS	5 HOURS	25 MINUTES
30 MINUTES		6 MONTHS	5 WEEKS	5 DAYS	1 DAY	2 HOURS
1 HOUR		10 MONTHS	2 MONTHS	10 DAYS	2 DAYS	5 HOURS
6 HOURS				2 MONTHS	2 WEEKS	1 DAY
1 DAY					8 WEEKS	5 DAYS

Here's a great table, courtesy of XKCD that sets out how much time you can invest, across five years, on improving your process.

Systems Allow You to Grow and Scale

Systems make growth possible.

Many lawyers spend less than half of each day on billable work. The rest is spent mired in unbillable administrative work. When you experience that growth spurt you've been working toward, having systems in place that streamline the administrative tasks will ensure you've got more time for the new billable work coming in. And when you're ready to expand your team, having clear processes and SOPs for your business tasks, as well as your legal work will ensure you can quickly onboard and train new team members. You'll be able to delegate legal and business tasks more effectively.

All of this will free you up to do more of the high-value work and still have time to develop new business. You'll finally be able to break free of the feast or famine cycle. But back to the elephant in the room: You're already overworked, and creating systems takes time. Is the investment going to be worth it?

The short answer is yes.

When you're busy, the key is to start small. As James Clear says in "Atomic Habits," aim to make your practice just 1% better every day.

THROWING MORE BODIES AT THE PROBLEM ISN'T ALWAYS THE SOLUTION

CREATING A LIBRARY OF SOPs

As your business grows, your first instinct may be to hire more staff to fill the gaps and handle the increasing workload. But new hires aren't always the solution. You may not need more people to scale your practice. You may just need to get the right people doing the right work.

We've defined efficiency as having the right people doing the right work the right way, and we've talked about the importance of having systems.

If you don't have systems, chances are you've got people in your office (including yourself) doing the wrong work the wrong way. Adding more people, who will also be doing the wrong work the wrong way, isn't going to solve your workload problem.

Here's why:

Inefficient processes waste time and money, no matter who's doing them. Putting new staff members into an inefficient workflow will only compound your problem because your new team members will experience the same inefficiencies.

- **New staff may struggle to complete work quickly and accurately.** Without clear processes, new hires will take much longer to get up to speed. This can result in mistakes, delays and frustration for the new hires and your existing staff.
- **Training will take much longer (and you're already busy).** Without standard procedures to follow, new hires won't understand how things are supposed to be done. They'll interrupt you much more often with questions, and they'll make mistakes that can be costly and time-consuming to correct.
- **Morale can suffer.** No one enjoys wasting time or struggling with tasks that seem unnecessarily complex. The result: high turnover rates, low productivity and decreased job satisfaction. Bringing in new hires before improving your systems can exacerbate the problem and make it challenging to retain quality staff.

On top of all that, if you don't have clear processes in place before you hire, it's much harder to identify who to hire, the skills they'll need, and the work you're going to assign to them. Do you need an associate? If you had a clear process to follow, could the work be done by a paralegal? An assistant? A student?

So what is the solution? Create a library of standard operating procedures (SOPs) for your practice.

You'll be better able to handle your increased workload with the resources you've got, and you'll be able to add more people to your practice when you grow even more.

Framework for Creating Effective SOPs

Here's a simple five-step process you can follow to create effective SOPs:

1. Track what you actually do.

The next time you start the task or process, record what you do as you go along. Your goal should be a series of clear steps that you (and ultimately others) can follow the next time you have to do the task.

2. Record the information needed

Capture all the relevant details for each step. For example:

- What documents, information or inputs do you need and where do you find them?
- What resources do you use?
- Where do you save or store the output of the task?
- To whom are the outputs delivered and in what format?

3. Test your instructions

Once you've got a good draft of your SOP, test it yourself the next time you undertake the task. Follow your own instructions to the letter.

- Can you follow them?
- Do you get the right answer?
- Are you left with questions?

Then ask someone else to do the same. Testing will help you identify any gaps or errors in the procedure.

4. Tweak your instructions

No matter who tests your instructions, it usually takes a few tries to get them right. Add in anything you missed. Create a screen recording. Simplify the language if you or your testers got confused.

5. Teach your instructions

Don't just hand over your SOP and expect someone to follow it the first time. Invest just a little more time talking through your instructions. Ensure they understand your instructions and answer their questions.

Continue Building a Library of SOPs

Use this five-step process for everything you do more than once in your practice. Over time, you'll have a library of SOPs that support your practice and your existing team. And when you're ready to add new people to your practice, you'll be able to do it quickly and effectively. ■

NO MORE SHINY BUTTERFLIES: HOW TO CHOOSE THE BEST TECH FOR YOUR LAW FIRM

It's hard to go a day without hearing about the latest in AI technology. Changes happen faster than you can say, "the rule against perpetuities." It can feel like you're falling behind if your firm isn't on board with the latest trends and it's tempting to want to run out and buy every shiny new tech platform. But getting the latest technology doesn't guarantee a boost in efficiency.

As we've discussed, adding more people to a growing law firm isn't always the solution. The same goes for technology: Resist the shiny butterflies.

Making the Best Use of the Technology You Have

Adding more tech to an inefficient process doesn't create efficiency. You'll just end up doing the wrong thing faster.

So before buying anything new, take a long, hard look at how you work and whether you're making the best use of the resources and technology you already have.

Here are three steps that will help you identify the best technology for your law firm and make the best use of it in your practice.

1. Understand How Your Firm Works

Take the time to understand exactly how you and your team work:

- What tasks do you do most often?
- Can those tasks be automated?
- What are your specific needs?
- Where are you experiencing the greatest difficulty?
- What feels like it's taking too long or seems too complicated?

Doing the work upfront means you won't waste time or money on resources that won't suit your practice or address your specific needs. In fact, implementing the wrong system could make your work harder … and that lack of efficiency and productivity is exactly what you're trying to avoid.

2. Redesign Your Processes

If your underlying processes aren't optimized, not even the best technology will magically solve your problems. You need to start by making your process visible and understanding how you work now and where the inefficiencies are.

Most often, eliminating those inefficiencies will require you to standardize the process you follow, create templates, and allocate the right people — and you'll want to do that before you add in the technology. Why? Because if your processes aren't standardized, you'll spend far more time (and money) trying to tailor software systems to all your variations and permutations, and you may not get consistent results.

Make it a priority to create a library of standard operating procedures for your practice before you look for a technology solution.

3. Identify the Right Technology

Once you've got a standard process to follow, it will be much easier for you to see exactly where technology could help, and that will help you identify the right software solutions.

As David always says, technology doesn't solve your problems, but smart people using the right technology properly can. Look for opportunities to inject technology that will make your work more accurate, faster and cheaper.

Remember to start with the technology you already have.

Most firms vastly underutilize the functions of their existing systems. For example, if you've got Microsoft 365, which has Planner and Bookings built right in, do you need a separate system for creating visual task management or scheduling meetings? Maybe … but start with what you've got and only add new tech if it delivers a must-have that your existing systems don't.

Develop a Plan to Implement the New Technology

People often ask us, "What's the BEST technology for …?" Our answer is always the same. The best technology is the technology you'll actually use. You could have the latest, greatest, most popular software available to your team, but if nobody uses it, it's a waste.

Once you've decided you need something new, what's the next step? Developing a solid plan for implementation and adoption. That includes a training program that sticks!

Work with the technology provider to plan your roll-out. Use their resources to train your team on the most important functions first, and ensure you prioritize that training. Your team needs to know that training is important, so lead by example, and also give them time to do it, without having to choose between training and other billable work.

As implementation progresses, talk to your team. Troubleshoot adoption issues and identify the features where additional training is needed or where your process may need tweaking.

And then use your new system.

Resist the Shiny Butterflies When Choosing the Best Technology

It's hard to resist the shiny butterflies with their promises of magical solutions to your inefficiency issues. But resist you must.

Focus instead on finding technology you'll use, in a streamlined process that works for your team. It may even be something you've already got. Once you've experienced the boost in productivity and efficiency you'll get from implementing the right technology the right way, you'll wonder how you ever got by without it. ■

MASTERING DELEGATION: 7 TIPS TO SCALE YOUR LAW PRACTICE

People who delegate effectively can generate 20% to 50% more revenue than people who do it all themselves. Learning how to delegate the right things to the right people is the key to unlocking your practice's potential.

Pop Quiz!

What's the biggest waste of time and money in most law practices?

(a) Time you spend waiting for stuff

(b) Correcting errors and redrafting

(c) All the emails you have to wade through every day

(d) Hours you spend in useless meetings

Answer: None of the above (although those are pretty annoying too)!

The biggest source of waste in law practices is the wrong people doing the work.

In a small or solo practice, the "wrong person" is usually you … and it's one of the biggest hurdles you'll face when you scale your law firm business.

We have talked about how you can create the foundations for growth. The systems. The processes. The best technology. Now you're ready to take the next big step toward scaling your practice: delegating legal work.

We can hear you now, with all the reasons you can't delegate:

- I don't have time to train someone.
- I don't have the money to hire anybody.
- I don't have enough work.
- It'll be faster to do it myself.
- It only takes 30 seconds …

We've heard them all. But delegation is the key to unlocking the potential in your law firm business.

Top 7 Tips for Delegating Legal Work

1. Identify and categorize your tasks

Grab a stack of sticky notes and, for the next week, make a note for every task you do. Stick them up on a blank space on your wall. Then separate your tasks into four categories:

- Tasks requiring your expertise or legal qualifications
- Tasks someone else could do, and you dislike
- Tasks someone else could do, but you enjoy
- Tasks you should stop doing altogether

You'll have to keep doing the things in the first category, and over time you'll want to stop doing all the things in category four. That leaves categories two and three. Those are the things you're going to delegate.

2. Start delegating the tasks you dislike the most

Always start by delegating the tasks in category two: the things you really dislike doing. You know your instinct is going to be to take back a task the first time someone makes a mistake. You'll be less likely to do that if it's something you hate!

3. Change your mindset about time

How many times have you said, "It'll be faster to do it myself"? Investing time in training is not a waste. If you've been following along with our series, you'll already have some standard operating procedures, or SOPs, in place. Once you've taught someone to follow your SOP or use your system, you'll never have to do that task again. Yes, the training will take time once or twice ... but you'll save time in perpetuity.

4. Delegate to freelance lawyers

As you start to scale, you may have more work than you can handle before you're ready to hire a full-time associate. Consider delegating legal work to freelance lawyers, also known as surge attorneys. Freelance lawyers can step in to handle specific legal projects, court appearances, document review and legal research. They can follow your SOPs and use your systems, making the execution of the work seamless. Just make sure you are adding a little markup on their fees — you're not running a temp agency!

5. Delegate to technology

The right person for the job may not be a person at all. Automate as many tasks as you can. Most practice management platforms have automations that can send emails, schedule appointments, create documents, and move information between systems to minimize data entry tasks. Take advantage of all these automation features.

Some research and writing tasks can be delegated, at least partially, to AI technology like ChatGPT. Use AI to create tone-appropriate responses to letters and emails, summarize meeting notes, simplify complex concepts, translate content and compile FAQs. It's a valuable, time-saving tool, but remember to verify and customize its output to ensure accuracy and alignment with your firm's style.

6. Do the math

When you start to scale, you may think you can't afford to hire someone to take over the administrative work. But surveys show that most small firm and solo lawyers spend up to five hours a day on their unbillable work. So let's do the math.

Multiply your hourly rate by the number of hours you spend on unbillable work every day. That's how much money you're leaving on the table when you do your own admin work. Why? Because you can definitely find someone to do that work for a lot less than your hourly rate (and probably faster, too).

7. Hire before you're ready

When you're ready to scale your business, you'll face the classic chicken-and-egg dilemma. You want to wait until you're sure you have enough revenue or work in the pipeline before you bring in someone new. But deep down, you know you'll never generate enough revenue or bring in steady work if you keep doing it all yourself.

The thing is, you don't have to start with a full-time employee. Hire someone for a few hours a week. Start them on a discrete set of tasks. Delegating business or administrative work to a part-time person will give you back hours to develop new business or focus on revenue-generating work.

For example, one of our coaching clients brought in an assistant for five hours a week to handle tasks related to intake. Almost immediately, she saw the impact. A process that was taking 1.5 hours now took her only 15 minutes, and her revenue increased far more than enough to cover the cost of her assistant.

Delegation Is the Key to Scaling Your Business

Most lawyers only bill for about 30% of their workday. The rest of the day is filled with admin and all those little things that "just take

30 seconds." But those "30 seconds" add up quickly and prevent you from effectively scaling your law firm business.

To grow your business without burning out, you need to start delegating.

Use these seven tips to identify and prioritize tasks to delegate; hire before you're ready and empower your team with SOPs, automations and technology; and leverage freelance lawyers and AI.

People who delegate effectively can generate 20% to 50% more revenue than people who do it all themselves. If you want to master this critical business-building skill and get resource guides and a checklist for onboarding new employees, check out Delegation Express below.

Start delegating now and unlock the potential of your practice! ■

ABOUT GIMBAL

You are in control of your future. Set big goals for your practice and let us help you design a plan to achieve them.

Most lawyers are great at the practice of law, but it takes more than good lawyering to run a successful business.

The thing is, law school doesn't teach you business and practice management skills. And when you don't run your practice like a business, you're going to work too hard. You'll waste time, resources, and money. And you'll end up working weekends, missing special occasions, cancelling vacations, and feeling guilty about it.

We know. We've been in your shoes. We're attorneys with decades of international experience in law firms and in-house. Now, we help lawyers earn more from their practices without working as hard.

Process Improvement Specialists

At Gimbal, we teach lawyers the skills they need to be as successful at the business of law as they are at the practice of law.

When you work with us, you'll learn to focus on doing the right work the right way, so you can accomplish more in less time and with less effort. You'll get new ideas, a fresh perspective, and proven business strategies that will help you build a more enjoyable, profitable business.

With a focus on strong business systems, effective time management, and highly efficient processes, we will help you build a law firm business that is smart, streamlined, and strategic. Perhaps most importantly, you'll finally have the time to enjoy your success.

Work With Us

We significantly improve firm productivity and profitability, by helping lawyers:

1. Develop their long-term strategy and a roadmap for achieving their goals
2. Improve operational efficiency by optimizing legal processes and strengthening business & administrative systems
3. Manage time & resources more effectively through delegation, matter management, and work allocation
4. Communicate powerfully by improving writing skills, marketing, and messaging

We do these four things in three ways:

1. Online and in-person training
2. Group and 1:1 coaching
3. Strategic planning and consulting

Got a question? Book a free strategy session or send us an email:

- david@gimbalcanada.com
- karen@gimbalcanada.com

ABOUT ATTORNEY AT WORK

"ONE REALLY GOOD IDEA EVERY DAY"

Attorney at Work is on a mission to provide practical information and inspiration you need to build a law practice and a life you love.

For more than a dozen years, contributors to the site — hundreds of industry experts, thought leaders and award-winning writers — have been delivering advice on tackling the everyday challenges of running a law practice so you can keep your business humming.

Every weekday, subscribers to our newsletter receive a free "Daily Dispatch" email that connects to resources that cover the waterfront — from getting clients, to using technology, to surviving growth mode, to what to do when a client fires you.

Regular columns deliver tips on law practice management, law firm finance, productivity, technology, client sercice, marketing and business development, and more. And our original books, special features and guides zero in on what you need to move your practice forward.

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