

Welcome to Gimbal's Free Webinar

Workbook

How to create
SOPs that save
time and money
in your law
practice



Introduction

US Airways Flight 1549 (January 15, 2009)



This incident, and the amazing outcome, reminds us of the incredible power of clear Standard Operating Procedures (or **SOPs**) and checklists. Combined with great training, they are why the people you see in this image survived.

Recommended reading: Atul Gwande's *Checklist Manifesto*

In the *Checklist Manifesto*, Dr. Gwande uses stories, and interviews with physicians, pilots, engineers, and other professionals to illustrate how SOPs, checklists, and written guides help us avoid “errors of ineptitude,” the mistakes we make because we don’t make proper use of what we already know.

What’s this got to do with the business of law? Everything!

- How many times have you started a task you’ve done before, only to realize you can’t remember exactly how to do it?
- Or come to the end of a process and discovered that you missed a crucial step?
- Or delegated a task, only to wish you hadn't because there were so many mistakes?

If you don’t have a written process for a task you do more than once:

- Routine tasks will take longer than they should;
- Errors creep in; and
- You can’t scale your practice or find time to get all the work done!

Agenda

- What successful firms do
- Efficiency in law
- What's this got to do with SOPs?
- Top tips
- Simple 5-step process
- Recap
- Conclusions

What Successful Firm Do

This is a checklist of things most of the successful firms we've come across do:

1. _____
2. _____
3. _____
4. _____
5. _____

For the purposes of this presentation, we want you to focus on the first two items on this checklist, and particularly the second.

Efficiency in the practice of law



The right people
doing the right work
the _____ way
at the right time
using the right tools

Characteristics of a good SOP

1. Precise
2. _____
3. _____

The benefits

1. Save _____
2. Fewer _____
3. Less _____
4. Improve _____ & _____ of delegation

Top Tips for creating SOPs that save time and money

1. Structure logically
2. Use _____, _____ language
3. Clarify the objective
4. Include all _____
5. Be detailed, BUT...
6. Not _____
7. Be clear about:
 1. _____
 2. _____
 3. _____
8. Make the SOPs easy to _____ and easy to _____
9. Make SOPs everyone's _____

5-step framework for creating effective SOPs

1. **Track:** For each new SOP or checklist you want to create, track exactly what you do now to accomplish the task.
 1. The goal is to reduce what you do into a series of clear steps that **YOU** can follow the next time you have to do the task.
 2. Those clear steps *also* have to be easy for **SOMEONE ELSE** to follow:
 1. in the event that you're away, say in a meeting, or on holiday, **or**
 2. because this is a task you've decided someone else **OTHER THAN YOU** should be doing.

Remember our definition of efficiency in the context of law: it all starts with getting the RIGHT PERSON doing the task.

2. **Record:** record all the information needed at each step to complete the step. For example:
 1. What documents and other information or inputs do you need?
 2. Where do you get them—from the client, from another member of your team, a website, where?
 3. What resources do you use (e.g. a template, a system, or an App)?
 4. Where do you save or store the output of the task?
 5. To whom are the outputs delivered and in what form or format—are you creating a memo to file, a client-facing reporting letter, a court filing, or something else?
3. **Test:** Once you've got a good draft of your SOP, **test it yourself** the next time you undertake the task. Start at the beginning and follow your written instructions exactly.

1. Can you follow them?
2. Do you get the right outcome?
 - If yes, great!
 - If not, what did you forget?

Then test the SOP you've created on someone else.

4. **Tweak:** No matter who tests your instructions, it usually takes a few tries to get the instructions right, especially if it's a task you do regularly, but *not* frequently.
5. **Teach:** Teach your instructions to whomever you anticipate may have to use them. Make sure the instructions are clear and make sense to the them and answer any questions they have. Don't wait for the "live-fire" exercise to find out that no one can actually follow the SOP.

Follow this process and start creating your library of SOPs, checklists and practice guides. They are the key to getting more work done faster and with less effort, while reducing the likelihood that some critical step gets forgotten or that other errors will occur.

Recap

- A. Firms that have achieved high growth over a sustained period of time are characterized by a focus:
 - 1. On delivering an **outstanding client experience**, *and*
 - 2. On the **efficiency** with which they:
 - 1. **Deliver their legal services**; and
 - 2. **Execute the business and administrative processes** that support them in their practice of law.

- B. **Efficiency in law** means having the **right people**, doing the **right work** the **right way**, at the **right time**, using the **right tools** (including appropriate technology)

- C. Having clear SOPs will:
 - 1. Significantly **reduce the time** it takes to complete both routine *and* complex tasks, particularly those you do less frequently,
 - 2. Help **error-proof**, by ensuring nothing gets forgotten, *and*
 - 3. Improve the **effectiveness and sustainability** of your delegation, which is critically important to your success.

*Use our 5-step process and get started today
building your library of SOPs.*

Conclusion

Attorneys who **create and use clear SOPs** to organize their practice and the business and administrative operations that support their practice **enjoy improved efficiency, productivity, and profitability.**

They **get more done** in less time and with less stress, and are more likely to be recognized by their clients as true value-driven legal professionals.

But SOPs are just one piece of a much larger puzzle. **It takes more than good lawyering to run a successful practice**, but there's so much law school didn't teach you.

That's why we created [Practice Accelerator Coaching](http://www.practice-accelerator.com).

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Practice Accelerator Coaching

Each month you'll benefit from:

- Solution-driven coaching, including tons of time to ask your questions,
- A 1:1 accountability call,
- An Insight session with industry experts, and
- A community of like-minded legal professionals. The members of the coaching program regularly support each other by crowd-sourcing additional ideas on building more productive and profitable practices they love that don't require so much time and effort.

Your plan

Imagine being successful *and* having the time and freedom to enjoy your success...

Here's your very simple **three-step plan to get there**.

1. **Join** the program
2. **Participate** in the coaching sessions and accountability calls
3. **Find** the clarity you're missing, eliminate inefficiency, and accelerate your results, so you can stop working so hard

Unlock the full potential in yourself and your practice!

[Join Practice Accelerator](#) today.



Your presenters

Karen Dunn Skinner is Gimbal's co-founder and CEO. She's a Lean Six Sigma Black Belt and an attorney with over 18 years of experience practicing law in Canada and Europe. She combines her deep understanding of the legal industry with her training in Lean Six Sigma to provide practical solutions to the competitive and budgetary pressures on practitioners and clients alike.

Karen's work adapting Lean to the legal industry has made her a recognized leader in legal practice innovation. She is Global Advisor (Legal Process Improvement) to the International Institute of Legal Project Management (the IILPM), and sits on the IILPM's Advisory Committee, guiding the development of legal project management and process improvement around the world.

Karen was a member of the Quebec Bar for over 20 years.

David Skinner is a co-founder and the President of Gimbal and a Lean Six Sigma Sensei with over 20 years experience practicing law. David spent more than a decade in large, international law firms in Canada, Europe, and the UK, and the second half of his career in-house in venture capital and as GC of a public biopharma company.

David combines his deep understanding of the practice of law with the perspective he gained as a client, to help lawyers improve their practice, performance, and profitability. He is Global Advisor (Legal Process Improvement) to the IILPM, and helps shape the international development of courses and programs teaching process improvement in the legal industry.

David was a member of the Quebec Bar for 25 years, and remains a member of the Bars of Massachusetts and New York.



Most lawyers are great at practicing law but many aren't so good at running and scaling their businesses. When you don't know how to run your practice like a business, you waste a lot of time and effort.

At Gimbal, we coach lawyers to be as great at running their businesses as they are at practicing law. The result: their practices grow in revenue and reputation and they finally have the freedom to enjoy their success.

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