

## Practice Tips...

# Effective Use of Legal Assistants

Legal assistants will increase your overhead and they can make your life miserable with constant interruptions to ask what needs to be done on cases and how to do it. Or, legal assistants can make your law practice more efficient, more productive, and more enjoyable. The choice is up to you.

I have used legal assistants in my practice for approximately seven years. I've also made many mistakes using legal assistants in a personal injury practice.

My first legal assistant was enrolled in the Edmonds Community College legal assistant program. She offered to work for two quarters without pay as part of her schooling. Since there was no cost involved I did little training and simply threw her into the job. It is a big mistake not to train legal assistants.



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That legal assistant worked hard. But with little training or direction we were inefficient. I often duplicated her work and she duplicated mine. She would hand work to me thinking her part was done and I would hand it back for her to do more.

After her schooling was over I put the legal assistant to work on a part-time basis, and later full-time. After working together for two years we had a fairly good working relationship but were not as efficient a team as I thought we should be. I was unable to delegate as much to her as I needed to. This was my fault.

When that legal assistant gave notice that she was leaving the firm I decided to analyze how the work was actually divided between the attorneys and legal assistants. For each separate task that needed to be accomplished on a typical personal injury case I wrote out what the legal assistant should do and what the attorney should do.

What I ended up with is a case checklist that is tied to a notebook that we call the Legal Assistant Task Notebook. For each

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# Legal Assistants

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item on the case checklist the notebook spells out what the legal assistant is to do and what the attorney is to do.

For example: When interrogatories come into our office the following steps occur:

1. 3 copies are made.
2. Legal assistant marks on the attorney copy which questions the attorney needs to answer.
3. Legal assistant forwards a copy to client with the questions marked that the client needs to answer.
4. Meanwhile the legal assistant answers the questions she can, makes standard objections, and compiles any documents whose production is requested.
5. After 3 days the legal assistant calls the client to be sure the client received the interrogatories and is working on them.
6. The legal assistant combines her answers with those of the client and the attorney.
7. The attorney reviews the completed interrogatories and makes corrections if necessary.
8. Legal assistant arranges for client to sign and then files the face sheet and distributes the interrogatory answers to counsel as appropriate.

After you have gone through the process of writing down the component steps to each task it becomes obvious what can be delegated to a legal assistant and what must be done by the attorney. Thinking through the steps in the process also makes clear

what you will have to train the legal assistant to do. Of course, legal assistants also need to be trained to recognize when they are not equipped to complete a task and when they need to ask the attorney for help.

The Legal Assistant Task Notebook has made the legal assistants in our firm more efficient. They now know what they have to do before a project is turned over to the attorney. When a legal assistant brings me a project it is ready for my input. I can deal with the project once and then put it aside.

Another benefit of the Legal Assistant Task Notebook is its use in evaluating the performance of legal assistants. It gives the legal assistants a guide as to what level of performance is expected of them and it gives the attorney a way to make constructive comments for improvement in skills.

Best of all, the legal assistant notebook allows delegation with confidence and allows me to concentrate on those tasks that really need my attention.

Have a valuable "Practice Tip" that you would like to share with WSTLA members? Please call Bob Dawson (624-5000) with your thoughts. Remember, your practice tip may relate to substantive law, procedure, or law office management.

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