Organizational Protocols to Streamline Production in a Busy Office

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Organizational protocols help increase productivity in a busy office. First tip: Get yourself a good accounting system with a robust client scheduling (CS) program. The more popular accounting systems are The Analyzer and RB. A good CS program can make or break how you follow through on a job. These are some things to look for in a Scheduler.

When you set up a job for the first time, this is your opportunity to get as much client information as possible. Aside from the typical job information like case name, location, client info and phone numbers, get the legal assistant's contact information. Take the time to catalogue the standard litigation support orders and likes/dislikes of counsel in a notes field. Was the job scheduled via a phone call, e-mail, on-line scheduler, or noticed via mail? Let the CS help you track this information. Additionally, it should let you know if a job was on before, who took that deposition, litigation support needs, and whatever else the reporter needs to know about that assignment via the notes field.

Keep track of how your reporters are doing. You should use the Scheduler to see who is on/off the book. Most CS programs let you keep track of vacation and sick days and job turnaround rate. Hunter & Geist (H&G) also uses a color-coded spreadsheet. Shelly starts the week ahead and fills in the blanks. It's fluid but at least she has a good "at a glance" idea of who's on the books, how many pages they have which could impact whether they need more pages or not, and she also takes requests for days off the book. In Doris O. Wong Associates' (DOWA) office, Donna handles the scheduling. Though she keeps most of it in her head, she also keeps a spreadsheet of the number of pages taken and copies ordered for each assignment so that everyone is on par as far as pages worked. With the spreadsheet, she can see who needs a break and who needs more pages.

Notices are sent via e-mail or snail mail. The idea is to make a PDF of the notice to save in a "Notices" folder on the server. When scheduling reporters, the scheduler attaches the notice to the reporter's job sheet. Once the job has been taken, move the notice into a "Notices Done" folder where it's later archived or deleted.

It's important to share case information with your reporters. That means title pages (PDF and CAT file format so the reporter doesn't have to retype captions and appearances), spellings and briefs, litigation support orders and notices. Case CATalsyt has a Corelist feature that lists words put in the job/case dictionary. This is much more handy than the full blown word list you might get with a compressed transcript.

Sending in completed jobs must follow standard protocols whether you enjoy an employer/employee relationship or not. Regardless of your setup, if you have in-house production, you should set up systems that enable everyone to do their job efficiently.

H&G and DOWA do all production in-house. Reporters hand in their jobs and it is production's responsibility to produce the transcripts, litigation support products, and handle the e-mails to clients. To make sure things go smoothly, the office should have consistent naming conventions for the files that come into the office. For example, you can use YYMMDDP1-SMITH. That's year, month, day, plaintiff's initial and 1 for the first deposition of the day plus the witness's last name. If there is a second deposition that day, the file should be named YYMMDDP2 – JONES. If you produce an uncertified rough, add an "A" at the end of the filename, such as YYMMDDP1A. However you choose to name your files, the key is consistency so that ten years down the line you or anyone else in your production department will be able to track down the file information for your client. Something else you should do as a standard practice is generate ASCII and PDF files and archive these with the certified transcript.

Naming conventions is one thing. Take it a step further. Set up directories on the server for CAT files, Scanned Exhibits, etc. Store them by Year. Within the Year, set up Months. For example: c:\CAT Files\2013\01.

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Archive completed transcripts and litigation support files in the CAT Files directory. If taken in January 2013, the file should be saved in the \2013\01 folder. Keep the protocol for every other type of file you'd like to save. It makes searching through files less cumbersome.

Templates, templates, templates. The reporter completes the billing sheet, errata sheet, and letters to counsel regarding reading and signing. All of these documents should be template based. Why recreate the wheel? The letters should look and read the same for clients to identify you as a firm. Whether they're done in Word or with the CAT software, make standardized letters. With the use of templates, it's simply fill in the fields.

H&G took it a step further. They designed fill-in PDFs for the billing sheets. The file has drop down menus for each service provided, and the reporter clicks her way through the billing sheet. The hope is that the attorneys know what they want. If the order differs from one reporter to the next, a flag should go up and production makes the phone call to get the order right.

Production bundles the transcripts and litigation support items to counsel. By law, at least in Massachusetts, transcripts are now sent encrypted via e-mail and the Cloud (Dropbox, Attachmore, etc.). Again, use templates for your e-mails so that you're not always retyping the same information over and over again. Always cc the firm.

Another thing to think about when adding people to your staff is get IT involved. Have an IT person in the office learn the different CAT software packages. Let them be the go-to person to answer CAT software questions. For those reporters using the same CAT software, why not share the page layout templates to new reporters so that they don't spend hours recreating your preferred format. Have IT develop and share Build Index templates so that reporters are more productive taking the testimony and spending less time figuring out how to build an index. Have the IT person send out tech tips to the reporters, build macros, create EZ Keyboards. DOWA is a big believer in training reporters on how to use the CAT software. Hold in-house classes. Educate your reporters to be proficient with their software.

Scan exhibits as soon as the job is done. Put them in Dropbox for the reporter ASAP. PDFs are searchable and go where they go. Archive the exhibits as a future marketing tool.

Thoughts for those who hire freelancers? Help them embrace the way you run your business. Make them part of your team. Teach them how to do their job better. In the end, it just makes them better producers, standardizes the work in your office, and hopefully increases their confidence/professionalism while on the job.

Do you do a lot of referral work? Get a lot of "information" from the hiring firm? Break down the information based on the Front Office, Reporter, and Production departments. Highlight what is relevant to each department. Store the "information" on the server by firm name so that when you do another job for them, the information is always at your fingertips. Only send each department what is needed to complete the job. Whenever possible, make the process of completing the job less cumbersome and intimidating.

Lastly, Shelly loves her double monitors. It saves her time flipping back and forth between files when she has information on one screen that she needs to apply to another document. I use an oversized monitor with a lot of real estate and can put multiple files on one screen. I also use an iPad as an additional screen.

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