



# The Florida Bar Out-of-State Division

# State-to-State

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Spring 2024



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Florida Ethics Opinion 24-1: Artificial intelligence and legal ethics

Spring into success: A strategic guide to revitalizing your law practice

Proposed OOSD officers and executive council members

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## COVER:

### Florida First District Court of Appeal

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The Florida First District Court of Appeal, also known as the First DCA, is headquartered in Tallahassee, Florida, the state capital. It is unique among the six Florida District Courts of Appeal in that, much like the U.S. Court of Appeals for the D.C. Circuit at the federal level, it handles most of the appeals in state administrative law matters. It is also solely responsible for handling appeals in workers' compensation cases. It is the Court of Appeals for 29 Florida counties, covering the Panhandle as well as the north-central parts of the state.

Source: Wikipedia

# Spring into success: A strategic guide to revitalizing your law practice

by G. C. Murray II



G.C. MURRAY II

The concept of “spring cleaning” refers to the annual tradition of thoroughly cleaning one’s home in preparation for the spring season. This idea can also be usefully applied to law

firms, particularly smaller practices, as an opportunity to clear out clutter and refocus priorities. Though the weather may not change, setting aside time each year for an organizational and performance review offers many benefits. Just as individuals often feel refreshed and motivated after tidying their living spaces, an annual “cleaning” of your firm’s operations can boost productivity and efficiency.

The spring is a natural time for renewal and growth. As such, it presents the perfect occasion for solo practitioners and small firm lawyers to step back and evaluate what’s working, what’s not, and what could be improved. An annual checkup enables you to identify areas of your practice that have become disorganized or inefficient over time. It also allows you to audit your finances, technology, marketing, and case management.

A thorough spring cleaning allows you to streamline operations, cut unnecessary costs, and align your practice to focus on your core goals for the coming year. The process can uncover new opportunities for growth and profitability. Most importantly, it helps ensure you deliver excellent and timely service to your clients.

## Review current cases

One of the most critical spring-cleaning tasks for solo and small law firms is reviewing current cases to identify opportunities for improvement. This involves examining each active case closely to determine whether it can be closed out or referred to another

lawyer within the firm, referred to another firm, or dropped.

When reviewing cases, focus on identifying those that are stagnant or have hit a dead end. These may be cases that have been waiting on client documentation or responses for an extended period. If you’ve exhausted efforts to move the case forward, refer it to another firm better positioned to resolve the issues. Also, look for cases that take up a disproportionate amount of time compared to the potential value or billable hours. These types of cases drain resources that may be better spent on more promising work. Consider referring them out to free up internal bandwidth.

In addition to referring out cases, look for those that need more attention going forward. Flag cases that have new developments or time-sensitive issues. Make sure you have the capacity and focus to move these cases forward quickly. Identify any additional resources, staffing, or expertise needed to progress the cases.

Regularly reviewing cases and reprioritizing allows small firms to focus their limited resources on the work with the most significant impact and highest value. Pruning stagnant cases and handing off lower-value work creates opportunities to provide better service to the most important clients and cases.

## Update case management software

Keeping your case management software up-to-date is a crucial part of spring cleaning for law firms. Start by checking that you have the latest version installed and set to auto-update. Outdated software can lead to security risks and missing out on helpful new features.

Spend time thoroughly reviewing the features and tools in your case management system. Look for ways it can help streamline and automate

routine legal tasks. For example, built-in calendaring and deadlines can save manual tracking work. Document automation can speed up drafting standard documents. AI features like search and review can make eDiscovery faster. Evaluate if any plugins or integrations could make your software even more useful. Look at what’s new and popular in legal tech that could integrate with your system, for example, apps for e-signatures, time tracking, accounting, and more.

Finally, train all staff to fully utilize the software. Set up individual dashboards and workflows tailored to each person’s role. The right technology is only helpful when properly adopted firm-wide. Invest time now, and it will pay off all year long.

## Audit current hardware and software

Law firms today rely heavily on technology to manage their practices efficiently and to provide top-notch service to clients. The spring season presents an opportunity to audit your firm’s technology and evaluate potential upgrades.

Take stock of all hardware and software currently used in your practice. Review the performance, efficiency, and security of each system. Identify any sluggish or outdated tools. Pay particular attention to case management, document management, email, calendaring/scheduling, time tracking, accounting, phone systems, and any other programs used daily. Consider speed, storage capacity, ease of use, integration, and security protections. For client-facing technologies like websites, blogs, and social media, evaluate the back-end platforms powering them. Assess site speed, mobile responsiveness, SEO optimization, integrations, security protections, and analytics.

Document any vulnerabilities or limitations uncovered in the audit process. Prioritize upgrades based on

potential productivity enhancements and risk reductions. Once current systems are audited, research new technologies that could benefit your firm. Look for tools to help with efficiency, organization, automation, analytics, security, and client service. Focus on solutions that integrate well together and with existing platforms. Key areas to investigate include paperless workflows, automated intake and forms, AI-powered legal research, virtual meeting platforms, digital signature services, user-friendly client portals, automated legal billing, and cloud-based practice management software.

Staying current on legal tech ensures your firm operates optimally while remaining secure. A spring technology audit prepares you for an efficient and productive year ahead. Consider free and low-cost tools to help maximize value. Reach out to colleagues at other firms to get real-world feedback on technologies they use. Leverage free trials and demos to test out promising solutions before committing.

### Analyze finances

A crucial part of spring cleaning for law firms is analyzing finances from the previous year and projecting the year ahead. This allows firms to align their spending and operations with their financial goals. Though not an exhaustive list, doing the following will help give you a better grasp on where your firm is economically:

- Gather financial statements and reports from the last 12 months. Review income, expenses, profits, and cash flow month-by-month or quarter-by-quarter.
- Analyze spending by practice area, client, matter, or other categories. Look for unexpected costs or billing issues. Identify what worked well financially and what needs improvement.
- Compare budgeted amounts to actual amounts in each area. Note any significant discrepancies or problem areas.
- Review accounts receivable aging and collection issues. Follow up on any outstanding payments.

- Forecast revenue by analyzing active caseload, pipeline matters, and expected new business. Consider seasonality and economic factors.
- Project costs like payroll, rent, technology, marketing, etc. Account for planned growth or reductions.
- Create a profit and loss projection based on revenue and expense estimates. Identify profit goals for the firm and partners.
- Establish a new budget aligned with financial projections. Build in contingency amounts.
- Identify areas to optimize like pricing, staffing models, systems, etc., to improve financial performance.
- Plan to compare projections to actual results monthly to keep finances on track. Adjust as needed.

### Review key performance indicators

As a solo practitioner or small firm, you must establish and regularly review your key performance indicators (KPIs) to ensure you're meeting your goals and identifying areas for improvement. During your spring cleaning, take time to analyze your KPIs over the past three to six months.

### Identify your most important KPIs

Determine which metrics are most vital for your practice by considering factors like profitability, efficiency, and client satisfaction. Common KPIs to track include:

- Billable hours
- Revenue
- Accounts receivable
- Time to complete matters
- Caseload
- Client retention rate

Focus on the three to five KPIs that provide the most significant insight into your performance and growth potential. Analyze your recent KPI results to set specific, measurable goals for improvement. For example, if your net promoter score is 7, aim to increase it to 8 over the next quarter. Or if your accounts receivable cycle is 45 days, work to reduce it to 30 days.

Setting clear objectives will help you prioritize actions to boost your KPIs. Regularly monitoring your progress builds accountability. With a focused effort on your most critical metrics, you can work toward increased productivity and profitability. Conducting a KPI review ensures you have the key data to make smart decisions that enhance your solo or small firm's success.

### Conclusion

As the season of renewal beckons, take this opportunity to rejuvenate your law practice through thoughtful and comprehensive spring cleaning. Your commitment to regular audits and updates—from case management to technological enhancements and financial scrutiny—will streamline your operations and elevate your service delivery. Let this spring mark the beginning of a year when your practice is maintained and thrives, ensuring your readiness to meet client needs with efficiency and excellence. Embrace this transformative process, and watch as it fosters growth, optimizes performance, and sets a robust foundation for future successes in your legal career. Embrace the potential of spring, and let it propel you toward unparalleled professional achievements.

*Editor's note: This article is part of "Evolving esquire," a series initially proposed for the Out-of-State Division of The Florida Bar and now also featured in the Solo Small Firm Section. The column offers practical advice and insights for legal professionals managing practices, navigating multijurisdictional challenges, or leading within corporate structures. Designed to enhance professional skills and manage legal practices effectively, each installment fosters resilience, emotional intelligence, and leadership, aiming to equip lawyers with tools for success in the dynamic legal landscape. We are excited about this partnership and the opportunity to engage and support a broader audience through actionable and insightful content.*