PROFESSIONAL CERTIFICATE IN LAW OFFICE MANAGEMENT
INTRODUCTION

Law office management is the term used to describe the many daily tasks and the long-range planning and management practices needed to run an effective and modern legal practice. The legal practitioners are increasingly relying more and more on paraprofessional colleagues to assist with their daily and termed planning, as well as management functions including the efficacy of information technology in the legal practice.

COURSE DESCRIPTION

This course is an introduction to and exploration of the law office both as a business and as a profession. The functional aspects of law office management such as fees, billing, timekeeping, ethical requirements, accounting, profitability (based on each client and brief), budgeting, and facilities management will be taught. Administrative skills such as leadership, communication, delegation and personnel issues will also be addressed. Specific software and related skills in the essential operating systems that comprise the modern law office will be reviewed, including docket control, records management, file management, and library management.

This course provides those students who have a career interest in the area of managing legal offices including the professional lawyers and their practice resources with an understanding of the realities of the practice of law. The student will also develop the necessary skills to organize firm business, deal with human relations and understand employee motivation. From this knowledge of the firm and its practice goals, the student will be equipped to integrate and participate on a firm management team and assist practicing attorneys in the effective management of their law offices.
LEARNING OUTCOMES

Upon completion of this course, students will be able to:

1. Describe and compare the various forms of legal practice including sole proprietorships, partnerships, professional corporations and office-sharing arrangements.
2. Understand the various client file systems, calendaring and monitoring systems, library and retrieval systems as well as essential office equipment.
3. Describe and compare the various methods for and the importance of accurate and timely tracking of law firm revenues and expenses, including reporting requirements, basic accounting concepts, timekeeping systems and billing practices.
4. Develop competency in the automation and computerization of management functions, finances, communication, library, and practice support.
5. Develop and evaluate criteria for staff selection and methods of maintaining office harmony, including the importance of adherence to state and federal laws regarding hiring/firing and employment discrimination.
6. Identify goals for sufficient training for all employees and goals to efficiently boost productivity while eliminating employee frustration and helping morale.
7. Identify the need for and devise plans to implement an office move, including negotiation, transition criteria, and troubleshooting.
8. Explain the need for and importance of confidentiality, discretion, and other ethical principles in law office management.
9. Demonstrate basic skills and confidence in the following areas:
   - Prioritizing tasks;
   - Organizing work day;
   - Delegation;
   - Maintaining harmonious communication through effective listening and constructive feedback among support staff, attorneys, and administration;
   - Maintaining smooth flow of office procedures, including supply inventory;
   - Screening, hiring, evaluating, and exercising authority in personnel matters;
   - Maintaining financial records, time records, budgeting needs as prescribed by partners’ goals, accounting, tax considerations, and payroll;
   - Acting as liaison between vendors, accountants, and consultants.

COURSE CONTENT

This course is divided into three modules; each of which is designed to be taken for one full day of the course. They are; Legal Market Place, which consists of those people that comprise the law office and the personnel relationships both within the firm and external to it; The Legal Management Skills, which are the skills dealing with the basic functions of the law office including fees, timekeeping, billing and financial management; Corporate Governance and Secretarial Practice, which broadly refers to the mechanisms, processes and relations by which corporations are controlled and directed with emphasis on the roles and functions of the legal practitioners in achieving the overall corporate objectives.
TEXT AND MATERIALS

MODULE I: THE LEGAL MARKETPLACE

A. Setting-up a Law Firm as Business Venture & Professional Practice
   1. Historical Development
      a. Organization and Structure
      b. Sole proprietorships
      c. Partnerships
      d. Professional corporations
      e. Office-sharing arrangements
      f. Miscellaneous firms
   2. Management and Governance
   3. Ethical Firm-Client Relationships

B. The Legal Team and the Human Resources Functions
   1. Historical Perspective
   2. The Legal Team Members and Their Roles
   3. Management Skills
      a. Organizing and planning functions
      b. Decision-making functions
      c. Staffing functions
      d. Interpersonal functions
   4. Role and Functions of the Personnel Manager
   5. Employee/Management Objectives
      a. Hiring issues
      b. Education
      c. Evaluation
      d. Compensation
   6. Team Approach to Decision-making

C. The Attorney-Client and Other Relationships
   1. Variables Affecting Client Relations
   2. Cultivating Clients
      a. Marketing and Advertising
      b. Public Relations
      c. Solicitation
      d. Referrals
      e. The value of Pro-Bono
   3. The Attorney-Client Relationship
      a. When Does it Begin?
      b. When Does it End?
   4. Attorney Discipline
   5. Attorney and paralegal colleagues
   6. The Roles of Professional Associations
   7. Representing Clients
   8. Giving Legal advice

MODULE II: LEGAL MANAGEMENT SKILLS

A. Legal Fees
   1. Types of Fees and Costs
      a. Retainer fees
      b. Fixed fees
      c. Contingent fees
      d. Associated costs and overhead
   2. Determination of Fees and Costs
      a. Formulas
      b. Leveraging
   3. Statutory Fees and Guidelines
   4. Fee Agreements

B. Financial Management & Profitability
   1. Tracking costs
      a. Booking-keeping systems
         • Manual
         • Automated
      b. Various accounting software
   2. Billing
      a. Process
      b. Methods
         • Manual
         • Automated
      c. Fee disputes
   3. Profitability
      a. Per Client
      b. Per Brief
      c. Per Attorney/Partner

C. Law Office and Technology
   1. Common Legal Software
      a. Spreadsheets
      b. Databases
      c. Litigation Support
   2. Internet
   3. Intranets and Extranets
TEXT AND MATERIALS (CONT’D)

4. Ethics of Technology
5. Online Chamber

D. Docket Control Systems
1. Elements of a Docket Control System
2. Calendar Systems
   a. Master Calendar
   b. Personal Calendar
   c. Calendaring Procedures
   d. Calendaring Ethics
3. Tickler Systems
4. Computerized and Manual Docketing Systems
5. File Review System

MODULE III: CORPORATE GOVERNANCE & SECRETARIAL ADMINISTRATION

A. The Scope, Role and Functions of the Company Secretary
1. The importance and special position of the secretary
2. The relationship with the chairman and directors
3. The personal attributes of a Company Secretary
4. The independence of the secretary
5. Shareowner relations and communications with other stakeholders

B. Case Study: Compliance for the Company Secretary
1. The compliance requirement for a Company Secretary
2. The compliance duties of a Company Secretary
3. CAMA companies law
4. CAMA Registrar of Companies
5. Guidelines for statutory records
6. Filing requirements and continuing obligations for a company limited by shares (statutory registers, annual return, registered office, commercial license, annual accounts).

C. Corporate Governance Best Practices Relating to Company Secretarial Practices
1. Statements of reserved powers and terms of reference
2. The annual calendar of the agenda for the Board and committees
3. Preparation of Board agendas and papers
4. The management of policies relating to disclosure of interest and related party transactions
5. Best practice minutes
6. Board document retention policy
7. The interface of committees and the Board
8. Director induction
9. Executive meetings
10. Managing collective responsibility and confidentiality

D. Board Evaluation
1. Types of Board evaluation
2. The benefits of Board evaluation
3. Characteristics of effective and successful evaluations
4. Characteristics of ineffective and unsuccessful evaluations
5. Managing the evaluation process
6. Managing evaluation feedback

E. Secretarial and Board issues
1. Managing conflict processes
2. Managing grievance and whistle-blowing procedures
3. Corporate responsibility
5. Sources of information for keeping up to date
Modes of Teaching and Learning
This course will employ the following methods of teaching:

A. Lecture/discussion
B. Computer-assisted & legal specialty software
C. Small group work & student collaboration
D. Student oral presentations
E. Case Analysis

Papers, Examinations, and other Assessment Instruments
This course will employ the following methods of assessment:

A. Short Quizzes
B. Student Presentations
C. Document preparation and Critiquing

Text and Materials

A. Textbook: Nollkamper, Fundamentals of Law Office Management (Current Edition); Thomson/DelMar Publishing
B. Web sources
C. Other computer-based and software-specific legal sources
REGISTRATION & ENQUIRIES

Date: 16 - 17 June, 2016
Registration: N10, 000 (non-refundable)
Tuition: N120, 000

FOR FURTHER ENQUIRIES, PLEASE CONTACT:
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