MATTER MANAGEMENT AND FILE MANAGEMENT FOR JUNIOR LAWYERS

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1. WHAT TO GET OUT OF THIS

1.1 For junior lawyers - An understanding of the actions you can take to properly manage matters and files.

1.2 For experienced lawyers - This can be a helpful guide to pass onto your juniors to give an overview of skills that may be natural to you.

1.3 Many of these processes are learned on the job, but hopefully this provides a roadmap that you don't have to figure out yourself through trial and error.

2. MATTER MANAGEMENT

2.1.1 Calendar reminders:

(a) important deadlines (court submissions, project dates)

(b) your absence dates (study leave, annual leave etc)

2.1.2 Master of meetings:

(a) Meeting prep

(i) Documents required for the meeting?

(ii) Dial in details etc / address

(iii) Allow enough time

(b) Notes in meetings

(i) date, attendees, time

(ii) key points summary

(iii) scan in hard copies or even just send email with dot points for phone calls

(iv) clarify areas that don’t make sense

(v) offer to circulate action lists

2.1.3 Time recording:

(a) Take a look at a bill for example narratives

(b) Get a system that works for you (timers etc.)

(c) Submit earlier rather than later - or you’ll forget

2.1.4 Extra points – keeping a record of fee estimates and reviewing bills to track against the estimate. Providing a fee update when asked or remind the supervising attorney to do so.

2.1.5 Software available – Trello (free), Asana (free), Monday.com (paid)

3. FILE MANAGEMENT

3.1 Outlook inbox organization:

3.1.1 Create an inbox subfolder for each matter you are on based on the client of record. May need to create subfolders for each client of record if multiple matters

3.1.2 Create outlook rules for emails that may not be priority so it doesn't clutter up inbox (eg. daily news alerts, create alert to move to separate file) - but be careful because some rules may see you move important emails into these holding files (eg. "new matter")

3.1.3 Link each subfolder to the appropriate document management system folder to ensure all relevant emails are filed (iManage Document Management System)

3.1.4 Saving all documents into the file (emails, attachments to be extracted separately) – working with your secretary (keep them cc'ed), have them create subfolders.

(a) Typical deal folder:

(i) Due diligence (if applicable)

(ii) Drafts

(iii) Execution

(iv) Executed

(v) Matter Administration

(1) Fee estimate

(2) Invoices

(b) Sending emails with files - send both a copy and link to the file:

(i) In case for some reason the file is deleted, you still have a copy to work off of)

(ii) Also helpful for comparing your drafts with the final product, and getting feedback

3.1.5 Version control

(a) Making changes in mark up and using compares

(b) Write comments when saving new version (e.g. v2 - amendments to reflect meeting on [date])

3.1.6 Worksite - if deleting a version, ask IT and don't pull whole string of documents as it will delete the whole file and is near impossible to recover

3.2 Document naming convention:

3.2.1 Each firm/ company/ partner will have their own style, but generally speaking: *Document* name - *intended action if relevant, eg. resolutions - company or project name* (*party who lasted commented and stage of document and date)*

(a) Dir Res - approval of ESOP - Project Tesla (Musk LLP draft 10 June 2020)

(b) SPA - Project Tesla (Space LLP draft rec'd 11 June 2020)

3.2.2 Can use house short form or your own, just make sure consistent and acceptable by those you work for, and your secretary understands how to label.

3.3 <u>Email naming convention:</u>

3.3.1 Email title clutter: remove excessive "re" and "fwd"

3.3.2 If emailing on one thread but on a different matter, change title name and put file number on for ease of searching later on.

4. WORKING WITH YOUR TEAM

4.1 Secretary

4.1.1 Work as a team - get an idea of what sort of tasks they can help you with, and how you can support them.

4.1.2 Depending on how they work, could help you with file management e.g. organising emails with attached files for follow up with matters that require your attention.

4.2 Partners and senior colleagues

4.2.1 Be responsive on emails, even if it is to acknowledge receipt of email and that you are progressing.

4.2.2 For senior colleagues, good to pop in at the end of day to debrief about the day's deliverables and next day tasks.