



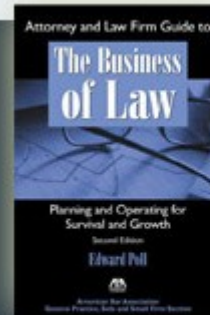
Week of **August 25, 2009**

An Engagement Checklist for In-house Counsel

That corporate clients are increasingly disenchanted with their law firms has become increasingly well documented, as shown by the ongoing acceptance of the Association of Corporate Counsel's "Value Challenge" to get more value from the legal profession. Earlier this year the BTI Consulting organization, which annually surveys hundreds of corporate counsel nationwide, made headlines with this startling statistic: 87% of in-house counsel said they would willingly replace their primary law firm "if given a compelling reason." This is a deep-seated dissatisfaction that can't be cured by some superficial fee cuts.

The simple fact is that law firms and their corporate clients often look at the world through different lenses, and effective communication between the two sides is the fundamental ingredient to a successful relationship. It's essential that the corporate client knows what the outside lawyer is doing, and that the client approves of the tactics to be taken to achieve the client's strategy/goal. Effective outside counsel find out not only what their clients need, but also what they want. Promoting quality communication between law firm and business client creates a mutually positive relationship that is cost-effective for the client and yet profitable for the firm.

Whether the relationship between corporate counsel and their law firms is a new one or one of long standing, every new matter involves the opportunity to establish a dialog that can support a collaborative relationship. By making clear all expectations and objectives right at the start, outside counsel should obtain as much information as possible about the goals and desires of the client. In-house counsel can further this understanding by bringing to the table a formal checklist that defines exactly what is expected of the law firm. The checklist should cover both qualitative issues and procedural



*Attorney and
Law Firm
Guide to
The Business
of Law*

Do you want to:

- Be more successful by design than by accident?
- Be more profitable?
- Attract more clients?
- Have your clients pay on time?
- Have greater control of your practice?
- Have greater peace of mind?

If your answer is yes to any one of these questions, you must read this book. I have simplified the mystical process of operating a law practice so anyone can be more effective with his or her clients and become more profitable.

This expanded edition adds 27 new chapters on marketing, personnel issues, technology, time management, clients' trust accounting, opening a new office, and changing from one practice to another. As I say in my Preface to the Second Edition, "When we lawyers act in a more business-like manner, we tend to be more effective in the delivery of our

details in such a way that outside counsel clearly knows how the client defines fundamental satisfaction. That should include clear statements of:

- The goal of and the budget for the engagement
- The means and frequency by which outside counsel will keep the corporate client informed
- Staffing levels, and identification of specific lawyers to be used
- Work product confidentiality and ownership
- All aspects of billing, fees and ancillary expenses.

This kind of documented relationship roadmap allows outside and in-house counsel to work and develop a proactive, interactive engagement approach. It recognizes the leverage that GCs have today to control legal costs. Collaboration through adherence to a checklist that documents how to provide greater value in legal services produces more effective representation at a lower cost to the corporate client without discounting either the value or the per hour fee of the lawyer.

services." The many ready-to-use forms and charts are available on a disk in Word Perfect, Excel, and Quattro Pro formats.

Take the first step in achieving a more successful practice—order today to get your own copy of the expanded *Second Edition of Attorney and Law Firm Guide to The Business of Law®* today!

[Click here to purchase the 642 page soft cover book + diskette of forms for only \\$119.95](#)

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Personal Commentary

Our [LawBiz® Forum](#) community continues to grow. Join us and participate in the discussions.

Our new addition to the family, Bandit, a 2 year old rescue Boxer, teaches us new lessons. It's been one week now and I feel like a new parent all over again. Last night he needed to go out at 3 a.m. But, it is so peaceful at that time. Only me, Bandit, and burglars were out. And, fortunately, I met none of the latter.

Best wishes,

Ed Poll
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What Readers Are Saying...

"The Business of Law (2nd. ed., 2003) might be the most practical and informative book I have read in 10 years, honestly."

-Atty, Dallas, TX

"I have...assigned many of your articles and excerpts from your book to my students in Law Office Management. You are indeed the master."

-JB

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