

<b>Managing the retainer</b>	Have a process every time	<a href="#">LPLC Client Intake Checklist</a>
	Right client? Right matter? Right time?	<a href="#">LPLC Engagement Habit</a>
	Conflict checking process	<a href="#">LPLC sample policy</a>
	Know your client obligations	<a href="#">Online tools for VOI</a>
<b>Communicating about costs</b>	Template cost agreement under the Legal Practitioner Uniform Law (Source NSW Law Society)	<a href="#">Cost disclosure and Costs Agreement precedent</a>
	Guidance on Reasonable steps for cost disclosure	<a href="#">Cost disclosure reasonable steps guidance</a>
	VLSB standard costs disclosure Form 1 can be used when your professional fee is not likely to be more than \$3,000 (before GST and disbs).	<a href="#">Standard costs disclosure form</a>
	Explainer on cost estimate for clients	<a href="#">LPLC Cost estimate brochure</a>
	Guidance on innovative pricing models	<a href="#">LSBC guidance on Agreed or value pricing</a>
<b>Communicating effectively</b>	Use visuals to communicate complex information (you don't need to be able to draw)	<a href="#">Canva</a> , PowerPoint, <a href="#">Lucidchart</a> , <a href="#">Noun Project</a> , <a href="#">Legal design toolbox</a> (Stanford Legal Design Lab)
	Provide video explainers of complex documents ahead of meeting	<a href="#">Watch Lawyer Cara Austen explain how she uses Loom or record your screen in PowerPoint</a>
<b>Getting feedback</b>	Complaints process	<a href="#">LPLC sample policy</a>
	Measure your client experience throughout the matter, not just at the end	<a href="#">Survey Monkey template</a>

<b>Record keeping</b>	Set up file note <a href="#">templates in OneNote</a> to use on iPad, tablet or Remarkable	LPLC <a href="#">File note template</a>
	Use detailed checklists	<a href="#">LPLC Will instructions file note</a>
	Export SMS, iMessage and WhatsApp chats from iPhone	<a href="#">iMazing</a> or <a href="#">Touch copy</a>
	Export SMS and MMS from Android phones	<a href="#">Droid Transfer</a>
	Send and receive text messages on your PC (requires Windows 11 for iPhone)	<a href="#">Microsoft Phone Link</a>
	Send and receive SMS messages from your email	<a href="#">SMS Broadcast</a>
<b>Good systems</b>	Documented process assists with effective delegation and monitoring of tasks	<a href="#">LPLC Tips for effective supervision</a>
	Legal project management tools help scope, plan, monitor and review how legal work is delivered - and identify opportunities for improvement.  Keep track of key dates, monitor progress and use automated reminders.	Many options depending on your needs - Planner, Asana, Monday, Trello, JIRA, and others  <a href="#">Project management Templates</a>
	Finish up your work well	<a href="#">LPLC File transfer checklist within firm   to another firm</a>  LPLC <a href="#">File closing checklist</a>
<b>Cyber security</b>	Understand where your data is stored and who has access.	<a href="#">LPLC Cyber Security Guide for Lawyers</a>  <a href="#">Free online cyber risk course</a> until August 2023