

Risk video bites – Systems save claims

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Legal work is complex and demanding. Practitioners are often under pressure to meet deadlines, satisfy clients and keep up-to-date with the changing legal environment, so you need a way to efficiently produce quality work on every client file.

Many claims every year are caused by simple oversights such as:

- preparing a mortgage, having it signed but failing to register it on title
- failing to conduct a check search prior to settlement, only to find a caveat has been lodged in priority to your clients transfer
- issuing proceedings in a testator's family provision claim but failing to serve them on the estate within six months from the grant of probate and before the estate has been distributed and
- preparing a notice to exercise an option to renew a lease but failing to serve it on the landlord before the deadline.

In short, basic legal processes are missed in the time poor pressure of day-to-day practice. Some of these errors can be fixed if identified in time but others go unnoticed until there is a claim. Systems are more critical at times of high pressure, when people are taking leave, colleagues are sick, a big matter is running in court or a large transaction is taking your focus.

So, what can you do to make sure you cover the basics, pick up the issues, don't miss deadlines or omit fundamental steps?

The answer is systems, policies and processes. Individuals cannot be expected to manage multiple complex matters in their head. Checklists, workflows, recording important or critical dates, precedent correspondence and a commitment to follow the agreed process is fundamental to producing quality legal work.

Systems are the tools for practitioners to deal with many complex matters but they also assist you to provide high-quality, efficient and timely work for your clients. It makes sense to spend time developing a good precedent letter you use repeatedly



rather than spending time to do a one-off letter on numerous occasions or worse still, not doing a letter at all.

Practitioners need to allocate time to work on systems and precedents. Acknowledging the importance of systems to avoid problems and to provide high quality client service is the starting point. After you recognise how important it is you can commit time and effort to establish a system that supports you and the work you do. A good system can:

- improve the efficiency and profitability of your work
- provide better client service
- provide consistency and quality to your work
- give you a structure to manage the complexity of multiple client matters and
- prompt you to cover the basics and avoid simple oversights.

Thinking about the work you do and ways to do it better are part of your role.

Building a system and process with calendars, prompts, checklist and precedents are necessary to conduct safe, efficient and high quality legal work.

LPLC has a range of helpful resources on our website and our risk managers are available to assist you.

Thank you for listening.