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Calendaring Best Practices: Seems Simple, but Is It?

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Technology is a driving force behind trends that significantly impacts the way your clients consume and interact with data. Ditching old habits can be hard, there is no argument there, but the benefits of adopting these new tech-driven changes will be the difference makers between profitable and unprofitable firms.

Calendaring. It seems so simple and trivial, but there is nothing more critical to your day-to-day operations than an accurate and up-to-date calendar. It is really important to evaluate and understand what types of calendars each attorney is using. If 2020 has taught us anything, it's that we must be able to effectively utilize [distributed workspaces](#); so if your calendar is a paper planner zipped up in your briefcase, staff working remotely will most certainly not be able to access it.

This blog will be broken up into two parts, part one today will focus on best practices, and establishing a workflow, and part two will focus on the dreaded missed deadline, bad habits and inefficiencies, and how to achieve calendar zen.

Let's jump in.



Calendaring Best Practices

1. Office-wide calendar

An office-wide master calendar is a really good rule of thumb. Having one place where all of your dates are listed across the firm, regardless of the attorney that's working on it, is a really good thing to have. Having a redundant calendar is important. If you're using Outlook 365, that needs to sync to your practice management system. Transparency and visibility cannot be sacrificed.

2. Recurring matter review date

You should set one review date for every matter to ensure they are being kept on track. What does this mean? You don't want to have 200 matters in your system and then realize in 6 months that you've only touched 40% of them. Having a recurring date to review your matters on a regular basis gives you time to see where each case is, to check in with your clients, and most importantly just keep everything organized and up-to-date.

The longer your case stays in your office, the less profitable it becomes. Take in cases, wrap them up efficiently, get them out the door, and collect your payment. The tighter you can make this process, the more money you will make.

3. Enter deadlines as soon as possible

Enter your deadlines as soon as you're aware of them with spaced out reminder dates. As soon as you know that a deadline is apparent, whether you've been served with discovery from opposing counsel, or a trial date has been scheduled, you want to make sure you get those dates into your calendar so that you do not forget about them. Having a tiered system to enter dates is also a smart thing to implement. Setting a reminder date to notify you that a deadline is coming up, an urgent date to alert you that you must take action now, and lastly a warning date right before the actual due date. By creating this tiered level of reminders, you will be able to stay more organized, and file motions for extensions if need be.

4. Staff accountability

Make sure all attorney and non-attorney staff are held accountable. Everyone should know what their role or responsibilities are when it comes to deadlines. Whether they are in charge of entering the activity, drafting paperwork corresponding to the event, editing, filing etc. Everyone should know what they are responsible for. If one person drops the ball and misses a deadline, there

should be no reason why anyone else attached to that activity misses the deadline.

5. Be realistic

Give yourself enough time to investigate and work towards a deadline. Some dates are pretty clear cut. But there are other rules that are slightly more ambiguous and may require more research. An example of this could be if you're taking on a case in a new jurisdiction. Give yourself enough time to investigate and work towards those deadlines.

6. Analyze Procrastination

Failure to react to the calendar is another field the ABA takes into account when they look at reasons for malpractice. So even with the best technology and minimal human error, if you're avoiding or dismissing deadlines, there may be a bigger problem. For example, if you're practicing law in an area you are not 100% familiar with, or if you're working for a client you don't particularly like, you need to figure out if you can find ways to combat those issues directly because if you cannot meet the deadlines, you need to remove yourself from the case.

What Goes Into A Good Master Calendar?

A good master calendar is crucial for firm-wide visibility, collaboration, and accountability. Many attorneys have the ability to manage their workload in their own way, this includes managing their own court calendar. However, every firm should still have a master calendar that is managed by a well-trained member of the team that can constantly keep it updated. If events are not updated, attorneys assisting on matters may be more prone to miss key dates or information.

Firms should also consider different viewing formats or filters. Your calendar must be agile and flexible enough to provide you with filtering options. In most cases, there are many filtering options that you can utilize, but it is best practice to explore which filters work best for specific teams. If your firm has different geographical locations you can filter by a specific area, or if you only want to view some members of the team over others, you can filter by that criteria as well.

A good master calendar should be backed up regularly, either offsite or in the cloud. Depending on what you're doing, if you have an on-prem system you are going to want to have a backup copy of that calendar in another location that is not your physical office. This is for reasons like natural disasters, break-ins, server malfunctions, etc. There are so many things that could happen and you

have to be prepared for them. **Cloud-based backups** are very easy to implement. If you're already paying for cloud services, your cloud provider should be doing most backups for you automatically.

Your master calendar should also flow to and from matter-centric calendars. If you're using practice management software, you want anyone who has privileges to access a matter in your system to be able to see the relevant dates and information for that matter. Additionally, this calendar should be accessible from your mobile device. Attorneys are on the go more often than not, so it is crucial that this information is available wherever they are. Make sure you turn on push notifications and reminders so that when you are using your mobile device for calendaring, you are alerted to what is due and when just like you would be on your computer.

Workflow Processes and Holding Your Staff Accountable

The roles and responsibilities for everyone involved with calendaring should be clear. Who enters the dates when activities are made clear? Is there someone who is going to be responsible for double-checking those calculations for deadlines? Have tasks been assigned according to the upcoming deadline so everyone knows what their responsibilities are in order to meet them?

Your calendaring process should be standardized across the firm to ensure continuity if staff changes. If that staff change does occur, then will you be able to easily train them on your process? Or if someone is out of the office, or they're sick, you don't want to have to call them with an emergency because the people who are available are not trained on how to read and operate the calendar.

Proper calendaring using case management should also funnel into easy billing. Why you may ask? It is part of productivity. You want to make sure that if you are putting in the work to make sure you are meeting those deadlines, then you also want to make sure that you're billing for it too. Some practice management software today have the capability to allow you to bill on the go, or **enter time** from the programs you're already working in. For example, you can record your time as you save documents in Word or when you send client emails from Outlook.

Nobody should be able to opt-out of using a calendar because you want to maintain that accurate centralized firm calendar that is used not only consistently but in a uniform and standardized way. The workflow for each matter should allow everyone to know what step needs to be taken and when. This will lead to a higher level of firm efficiency, a higher level of communication, and as a result, higher client satisfaction.

What To Walk Away With

Calendaring seems simple, and in part it is. But it also can be the difference between a malpractice suit and a profitable law firm. It is important to learn and train your team on best practices because although calendaring seems like a no brainer, you'd be surprised about how many firms struggle to keep their schedules buttoned up and organized.

To learn more about Centerbase's calendar, schedule a free no-obligation [product demo!](#)

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