

THE MANUAL: OFFICE PROCEDURES

Now that the terms of employment have been fully addressed, the procedures for working in your office should be outlined. This portion of the manual should provide the employee with detailed instruction of how to perform their duties as well as instruction in performing the duties of someone else if needed.

SECURITY

Because a law firm handles confidential information, maintaining security is imperative. Of biggest concern today is electronic security for computer systems and files. (Please see our handout on "Email, Internet and Wireless" in the Risk Management Resources section of our website for more information on developing policies regarding electronic file policies.)

Another aspect of security is the proper disposal of confidential information. Shredding policies for documents should be addressed. If your firm employs a disposal company to shred documents for you, placing confidential documents in secure containers until it is picked up to be shredded should be stressed. Leaving confidential information in a recycle box to be emptied later could be a liability should someone gain access to your office.

To prevent unauthorized access to your office, outline opening and closing procedures that provide security for your staff and your confidential information. Physical access to the office was described in the office structure section, but reiterate security procedures as part of the maintaining confidentiality process.

EMERGENCY OR DISASTER

Hopefully never to be needed, every office needs an emergency and/or disaster plan. Natural disasters such as hurricanes or flooding should be addressed, but modern disasters such as server crashes must be

Another portion of emergency planning is the procedure for an on the job emergency. Describe the procedure for reporting injuries. If the incident is a worker's compensation claim, include information regarding proper procedures for notifying management.

REPRESENTING FIRM

This section furthers the basic code of conduct outlined in the personnel policies. Provide instruction regarding the proper way to greet clients and answer the telephone. While these simple gestures may be second nature to some, having guidelines will present a uniform image of the office.

Maintaining confidentiality is another portion of representing firm. This requires no watercooler gossip within earshot of clients who are visiting the office. Remind employees that they are not allowed to discuss cases in front of clients.

REPRESENTING CLIENTS

Of course the most important function of a law firm is the representation of clients. This section describes the proper office procedures for engaging and declining representation. Referring cases to third party lawyers should be delicately handled, for example, when your firm cannot accept a case.

The proper use of engagement letters is crucial for establishing client relationships. Be sure staff know the procedures for using engagement, non-engagement and dis-engagement letters so that representations are clearly established from start to finish. These letters can greatly reduce the headaches caused by misunderstandings between clients and attorneys. (For more information, including sample letters, please see our "Attorney-Client Relationships" handout in the Risk Management Resources section of our website.)

Small Business Office Procedures Manual

Marcia Layton Turner



Small Business Office Procedures Manual:

Small Business Program Operations Manual, 1985 *Monthly Catalog of United States Government Publications* United States. Superintendent of Documents, 1985 February issue includes Appendix entitled Directory of United States Government periodicals and subscription publications September issue includes List of depository libraries June and December issues include semiannual index *Intermediate Care for Veterans* United States. Congress. House. Veterans' Affairs Committee, 1963 *Public Health Service Publication*, *Hearings* United States. Congress. House. Committee on Veterans' Affairs, 1963 **Marketing Information Guide**, 1957 **Monthly Catalogue, United States Public Documents**, 1985 Modern typewriting and manual of office procedure. [With] Teacher's handbook and key Arthur E. Morton, 1903 **Resources in Vocational Education**, 1980 Publications - Small Business Administration United States. Small Business Administration, 1967-10 **Hearings** United States. Congress. House. Select Committee on Small Business, 1963 *Research in Education*, 1974 A Guide to Defense Contracting Dan Lindner, 2024-10-14 The federal government is the largest buyer of goods and services in the world spending hundreds of billions per year and employing hundreds of thousands of people as civil servants military or contractors Over the years volumes of regulations and policies have evolved to impact this buying A Guide to Defense Contracting Principles and Practices helps to demystify the process providing in one volume a succinct yet thorough guide to federal contracting requirements or regulations Bringing together concepts of business law politics public and social policy pricing and contract placement and administration Dan Lindner draws on 40 years of federal government experience to cover the vast spread of this important process that impacts our daily government operations **The Lay-out of Small Water Mains** H. H. Hellins, 1921 Guide to Records in the National Archives United States. National Archives and Records Administration. Southwest Region, 1989 **Contracting With...EPA, a Guide for Prospective Contractors** United States. Environmental Protection Agency, 1974 The Unofficial Guide to Starting a Small Business Marcia Layton Turner, 2011-08-24 The inside scoop for when you want more than the official line Want to be your own boss but aren't quite sure how to make it happen This savvy guide will show you the way Now revised and updated to cover the latest regulations techniques and trends it walks you step by step through the entire start up process from coming up with a business plan and lining up financing to setting up shop marketing to your customer base and dealing with accounting taxes insurance and licenses Packed with real world tips and tricks that you won't find anywhere else it delivers all the know how you need to declare independence from the 9 to 5 world launch your business and watch the profits grow Vital Information on real world entrepreneurship that other sources don't reveal Insider Secrets on how to secure financing and choose a winning location Money Saving Techniques including low cost ways to market your business Time Saving Tips for creating a business plan and handling legal and accounting basics The Latest Trends including how to launch a profitable home or Web based business Handy Checklists and Charts to help you plan your

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