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Offering AI Upskilling as a Job Benefit: A Smart Move for Office Managers

Office managers are always thinking about how to support the team, boost productivity, and stay competitive in a changing workplace. One way to do all three? Offer **AI upskilling** as an employee benefit. You've probably heard plenty of buzz about artificial intelligence transforming industries—but the practical question is: how can your team keep up? The answer might be simpler than you think.

AI upskilling refers to training employees on how to work with, leverage, or manage AI tools. That doesn't necessarily mean turning everyone into

a data scientist. It can be as accessible as helping your team learn how to use AI-powered software to automate tasks, improve workflows, or even enhance their communication. By making this kind of training available, you show your team that you're invested in their growth and the future of the organization.

The good news is that AI learning doesn't have to be expensive or complicated. You can start by offering access to online courses, many of which are free or low-cost. Here are some beginner-friendly resources you can share with your team:

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WEBINAR

Cracking the Compensation Code: Compensation Across the Lawyer Lifecycle

Join **Brenda Barnes** and **Camille Stell** for this practical “how-to” webinar, packed with proven tips and techniques to give you a comprehensive understanding of today’s fair compensation strategies within law firms. Learn how to attract and retain top legal talent, fairly compensate lawyers across their career lifecycle, and build loyalty that ensures smooth leadership transitions.

Thurs., Nov. 20, 2025, 1 pm Eastern



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Offering AI Upskilling as a Job Benefit: A Smart Move for Office Managers

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Beginner-Friendly AI Training Resources

Coursera – AI For Everyone (by Andrew Ng): A great introduction to what AI is and how it’s used in business—no technical background required.

LinkedIn Learning – Artificial Intelligence Foundations: Machine Learning: Offers solid foundational knowledge with a focus on workplace applications.

Udemy – ChatGPT Masterclass: Hands-on instruction in how to use ChatGPT for productivity, communication, and brainstorming tasks.

Google – AI Essentials Course: A free course covering the basics of how AI works and how it’s used today.

Microsoft Learn – Introduction to AI: Another free resource for beginners, especially helpful for teams using Microsoft tools.

You could also invite speakers or trainers to host in-office workshops or virtual sessions customized for your workplace. If that’s not feasible, consider setting up a shared Slack or Teams channel for AI tips, or run a monthly lunch-and-learn where one person shares what they’ve discovered.

What makes this benefit so powerful is that it addresses both individual development and organizational resilience. When your employees understand how to use AI effectively, they become more confident, more efficient, and more adaptable. That’s a big win in any role, whether someone’s managing client communication, handling inventory, or analyzing reports. And when people feel like they’re growing at work, they’re more likely to stay.



Don’t forget to market this as part of your benefits package. Mention AI upskilling opportunities during the hiring process or in internal communication about professional development. If you have a training stipend or tuition reimbursement program, make it clear that AI-related learning qualifies.

Offering AI upskilling isn’t just about technology—it’s about people. It shows that you recognize where the workplace is headed and that you want to bring your team along for the journey. And when your team feels supported in learning new skills, they’ll be more likely to support the business in return.

How to Unplug from Work Over the Thanksgiving Holiday



Thanksgiving is almost here, and as a law office administrator, you're no stranger to the fast-paced nature of your role. From managing deadlines to keeping operations seamless, it's easy to let work take over your time. But even the most dedicated administrators need a chance to recharge. Thanksgiving offers a perfect opportunity to step back, enjoy the holiday, and return refreshed. Here's how to unplug effectively while ensuring the office stays on track.

1. Prepare the Office Before You Step Away

The secret to a stress-free break is preparation. In the days leading up to Thanksgiving, identify critical tasks that must be completed and delegate where necessary. If there are deadlines or client needs that might come up, ensure the team is clear on who's responsible. A quick planning meeting can work wonders to set expectations and handle last-minute details.

Set up an out-of-office email reply that provides clear information about when you'll return and whom to contact in your absence. This small step ensures clients and colleagues know you're unavailable while maintaining professionalism.

2. Communicate Your Holiday Boundaries

Let your team and firm leadership know in advance that you'll be stepping away to enjoy the holiday. This transparency helps establish boundaries and encourages others to respect your time off. Remind your team that you've set them up for success and trust them to manage without constant oversight.

3. Minimize Digital Distractions

It's tempting to check emails or respond to messages, but once you open the door to work, it's hard to shut it again. Create a plan to limit your screen time. Consider disabling work email notifications or committing to checking them only once during the break if absolutely necessary.

4. Empower Your Team

Your role often involves solving problems, but your team is capable of handling challenges

in your absence. Make sure they have the tools and confidence to address routine issues. Empowering them not only lightens your mental load but also gives them a chance to shine.

5. Focus on Gratitude and Connection

Thanksgiving is a time to step away from work and focus on the people and experiences that bring you joy. Whether you're hosting a family dinner, enjoying a quiet day, or volunteering in your community, immerse yourself fully in the moment. Practicing gratitude can help you shift your mindset and leave work concerns behind.



6. Leave the Guilt at the Office

It's common to feel a little guilty about stepping away, especially in a busy law office. But remember, taking care of

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How to Unplug from Work Over the Thanksgiving Holiday

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yourself is essential to doing your job well. A well-rested administrator is far more effective and resilient than a burned-out one.

7. Plan for a Smooth Return

Before the holiday break begins, prepare for your return. Make a list of tasks to tackle first

when you're back, and resist scheduling important meetings or deadlines for your first day. This will help you ease into work mode and feel more in control.

8. Reflect and Recharge

Thanksgiving is a wonderful time to reflect on the contributions you've made to your firm and the impact of your work. Use the holiday to celebrate your accomplishments, rest, and gain fresh perspective for the weeks ahead.

Enjoy the Break You Deserve

As a law office administrator, you're a cornerstone of your firm's success. By preparing ahead, setting boundaries, and fully embracing the Thanksgiving holiday, you can return to work energized and ready to tackle new challenges. Remember, your well-being is just as important as the smooth operation of the office—taking time for yourself benefits everyone.

Happy Thanksgiving! ■

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MANAGER'S TOOLBOX

Checklist: 8 High-Impact Projects for November

November is a crucial month for getting organized, closing out projects, and preparing for the year ahead in any law office. With the holiday season around the corner, it's also the last stretch to tie up loose ends before December gets hectic. Here are some high-impact tasks to check off your list this month, so you can wrap up the year smoothly and set the foundation for an even better 2025.

✓ Conduct a Year-End Financial Audit

November is a great time to conduct a thorough financial review. Go over client accounts, outstanding invoices, and payments, ensuring everything



is accurate and up-to-date. Start preparing for tax season by gathering any necessary documentation and identifying potential deductions. Also, analyze your budget to pinpoint areas where spending can be reduced or better allocated, setting the stage for next year's financial planning.

✓ Plan and Communicate Holiday Schedules

With the holidays fast

approaching, set up a clear plan for holiday hours, time-off requests, and any adjusted working schedules. This is also the time to discuss on-call coverage or rotating shifts to maintain client support. Communicate schedules with staff and attorneys well in advance to avoid any confusion or last-minute scrambles. A proactive approach to scheduling will keep things running smoothly for your team and clients.

✓ Check Inventory and Order Office Supplies

Review your inventory of essential supplies, such as paper, toner, office materials,

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MANAGER'S TOOLBOX Checklist: 8 High-Impact Projects for November

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and any legal resources that need updating. With the busy season in December, it's helpful to place any orders in November to avoid holiday-related shipping delays. Consider negotiating with vendors for year-end discounts, especially if you're ordering in bulk.

✓ Client Outreach and End-of-Year Reminders

November is a great time to reach out to clients with any reminders about pending case matters, final deadlines, or important documents they need to submit before the end



of the year. Consider sending out a holiday greeting or year-end newsletter, updating clients on any changes in the firm, important case victories, or new service offerings. This type of proactive outreach is a valuable opportunity to build goodwill and reinforce client relationships.

✓ Assess Technology and Security Needs

Technology and security assessments are essential to ensure client data is secure and that your systems are running smoothly. Look for any software that may need updating and review cybersecurity protocols. If your budget allows, November is a good time to invest in new security tools or plan for any system upgrades you'll need in 2025. This proactive approach to tech maintenance helps prevent potential security risks and keeps your office efficient and compliant.

✓ Training and Compliance Check-In

This month, assess any ongoing compliance requirements or professional development needs for your team. Many states require continuing legal education (CLE) credits, so confirm everyone is up-to-date or registered for any final courses before the year ends. Additionally, you might consider scheduling a refresher on cybersecurity protocols or a meeting on firm policies to ensure everyone is well-informed.

✓ Tidy Up and Organize Files

Take advantage of a slightly slower month to declutter and organize. Review your filing systems, both physical and digital, to ensure they're up-to-date and easy to navigate. Archived cases or files that are no longer active can be moved



to storage or securely disposed of if they're no longer needed. A little organization now can save a lot of time and frustration down the line, making it easier to kick off the new year with a clean slate.

✓ Begin Strategic Planning for 2025

Finally, start drafting your strategic plan for the upcoming year. Reflect on the successes and challenges of the past year, gathering input from the attorneys and staff on areas they think could improve. Set preliminary goals for 2025, whether it's growing client services, streamlining processes, or increasing productivity. A clear plan will give your office a strong vision heading into the new year.

By tackling these tasks in November, you're preparing your law office to finish the year strong and start 2025 on solid footing. This proactive approach ensures you're organized, financially prepared, and ready to provide excellent support to both your team and your clients—no matter what the new year brings. ■

Billing for Paralegal and Support Staff Work: What's Permissible?

Billing for paralegal and support staff work can be a valuable way to maximize a law firm's revenue—when done correctly. However, improper billing practices can lead to client disputes, ethical violations, and even disciplinary action. As a law office manager, you play a key role in ensuring that your firm's billing for non-attorney work is both ethical and compliant with industry standards.

Here's what you need to know about billing for paralegal and support staff time.

Understand the Ethical Guidelines for Billing

The American Bar Association (ABA) and state bar associations set clear rules regarding billing for paralegal and support staff work. Generally, you can bill for tasks performed by non-attorney professionals **if**:

- The work is **substantive legal work** that would otherwise be performed by an attorney.
- The paralegal or staff member is **properly trained and supervised** by an attorney.
- The firm does **not bill at an attorney's rate**—paralegal

work should be billed at a reasonable market rate.

The ABA Model Guidelines for the Utilization of Paralegal Services confirm that legal assistants' work must not be billed as attorney time and should be clearly itemized on invoices.



What Tasks Are Billable?

Paralegal and support staff work can be billed when it involves substantive legal tasks that contribute directly to case outcomes. Common examples of **billable** tasks include:

- Drafting pleadings, contracts, and legal correspondence (under attorney supervision).
- Conducting legal research and summarizing findings.
- Preparing discovery documents and responses.

- Interviewing clients or witnesses (as part of case preparation).
- Managing case files, including organizing exhibits for trial.

The key is that these tasks require legal skill and would otherwise be performed by an attorney at a higher rate.

What Tasks Are Not Billable?

Administrative and clerical tasks should **never** be billed to clients, even if performed by a paralegal or legal assistant. These include:

- Scheduling meetings or court dates.
- Transcribing dictation.
- Filing or organizing documents.
- Data entry or copying documents
- Answering routine client calls about scheduling.

These tasks are considered overhead costs and should be factored into the firm's rates rather than billed separately.

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Billing for Paralegal and Support Staff Work: What's Permissible?

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Set Proper Billing Rates for Non-Attorney Work

To avoid ethical issues and client pushback, your firm should establish **clear, reasonable billing rates** for paralegal and support staff work. Consider:

- **Industry benchmarks** – Research what similar firms charge for paralegal services in your region.
- **Experience and expertise** – More experienced paralegals may justify higher rates.
- **Transparent rate structures** – Clearly differentiate attorney, paralegal, and administrative rates on client invoices.

For example, a firm may charge:

- **\$300–\$600** per hour for attorney work.
- **\$100–\$250** per hour for paralegal work.
- **Non-billable** for administrative tasks.



Clearly Identify Billable Paralegal Work on Invoices

To avoid client disputes and ensure compliance, invoices should itemize paralegal work separately from attorney time. Best practices include:

- Listing **who performed the work** (e.g., “Jane Doe, Paralegal”).
- Providing **detailed descriptions** of the task (e.g., “Drafted and formatted response to interrogatories”).

Always review client contracts and billing agreements to ensure compliance and avoid rejected invoices.

- **Avoiding vague descriptions** like “file review” or “legal research” without specifying the purpose.

Example of a well-structured invoice entry:

- 2.0 hrs – Jane Doe, Paralegal – Drafted deposition summary for Attorney Smith’s review.

Ensure Compliance with Client Guidelines

Many corporate clients, insurance companies, and government agencies have **strict billing guidelines** that dictate:

- Which staff members’ work is billable.



- Maximum billable rates for non-attorney time.
- Required invoice formatting and descriptions.

Always review client contracts and billing agreements to ensure compliance and avoid rejected invoices.

Train Attorneys and Staff on Proper Billing Practices

Even with clear policies, improper billing can still happen if attorneys and staff aren’t aware of the rules. Conduct **regular training** to ensure:

- Attorneys only delegate **billable** work to paralegals.
- Paralegals **track and describe** their work properly.
- Support staff know which tasks should never be billed.
- Which staff members’ work is billable.
- Maximum billable rates for non-attorney time.
- Required invoice formatting and descriptions.

Always review client contracts and billing agreements to ensure compliance and avoid rejected invoices. ■

What Is Trello—And How Can It Help You Run Your Medical Office More Smoothly?

When you're managing a busy medical office, you need more than sticky notes and mental checklists to keep everything organized. Enter Trello and similar project management tools. If you've heard the name but never had time to dig in, here's a quick rundown of what Trello is—and why it could become one of your favorite office tools.

What Is Trello?

Trello is a digital task management platform that helps you organize work visually. Think of it like a virtual bulletin board filled with sticky notes (called "cards") that you can move around into different columns (called "lists"). These boards can be customized to track projects, workflows, communication, and just about anything else that needs organizing.

Other programs in the same category include **Asana**, **Click-Up**, **Monday.com**, and **Microsoft Planner**—each with slightly different features, but all designed to help teams stay on top of their work.

How It Works

At its core, Trello uses a simple setup:

- **Boards** for each major category (like "Front Desk



Operations" or "Patient Follow-Up")

- **Lists** to break the workflow into stages (such as "To Do," "In Progress," and "Done")
- **Cards** for individual tasks (like "Call pharmacy about Dr. Patel's prescription refill")

Each card can include due dates, attachments, checklists, comments, and more. You can assign team members to tasks, track progress in real time, and set reminders so nothing falls through the cracks.

Why It's Useful in a Medical Office

Managing a medical office involves juggling scheduling, billing, staff coordination, patient communications, compliance, and everything in between. Trello can help you streamline all those moving parts.

1. Organize Daily Tasks

Create a board for your front desk or administrative team, with lists for tasks like "Today's

Priorities," "Waiting on Info," or "Completed." This helps everyone know what needs doing and who's doing it—no more repeated emails or hallway catch-ups.

2. Track Recurring Workflows

Need to do insurance verifications every Monday? Monthly inventory audits? You can create templates or recurring cards in Trello so these tasks stay consistent and don't get forgotten.

3. Coordinate Projects

Whether you're rolling out a new EMR system, planning a staff training, or revamping the waiting room, Trello helps you break big projects into manageable steps, delegate them, and watch progress unfold.

4. Improve Team Communication

Instead of chasing down updates or digging through your inbox, you can comment directly on Trello cards. Everyone involved sees the same information, and updates are transparent and easy to track.

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What Is Trello— And How Can It Help You Run Your Medical Office More Smoothly?

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5. Increase Accountability

When tasks are assigned with due dates and tracked in one place, it becomes easier to follow up—without micromanaging. You can spot bottlenecks or delays before they become problems.

Getting Started

Trello offers a free version that's more than enough to start with. You can invite team members, build a few boards, and experiment with different workflows. If you're hesitant, try using it just for one area—like handling incoming patient messages or organizing your staff schedule—until you feel more confident expanding it.

And don't worry if Trello isn't the perfect fit. There are other platforms with different visuals and features—Asana is more list-

cused, ClickUp includes built-in time tracking, and Monday.com integrates easily with other tools. The best choice is the one your team will actually use. ■

Related Reading

- <https://www.lawofficemgr.com/managing-policies-technology-and-support-systems-for-remote-and-hybrid-work/>
- <https://www.lawofficemgr.com/6-tips-for-choosing-legal-practice-management-software/>

Seize Control of Your Workday

Your to-do list is long, your inbox is overflowing, and everyone seems to need something from you—right now. As a law office administrator, your day can feel like a nonstop whirlwind of requests, interruptions, and unexpected fires to put out. But instead of letting the day control you, it's time to take control of your day. With a few key strategies, you can stay organized, focused, and ahead of the chaos.

Start with a Plan, but Stay Flexible

You can't control every surprise that comes your way, but you can set yourself up for success with a structured plan. Take ten minutes at the start of each morning (or the night before)

to outline your top priorities. What absolutely must get done today? What can wait? Having a plan helps you focus, but be prepared to adjust when urgent matters arise. Flexibility is key, but it doesn't mean you have to abandon your priorities altogether—just shift them strategically.

Tackle the Big Stuff First

It's tempting to start the day by answering emails or handling

quick tasks, but that often leads to spending the entire morning on minor issues while the more important work piles up. Instead, dive into your most critical task first, while your energy and focus are at their peak. Whether it's a budget review, a compliance report, or a staff meeting prep, knocking out a major task early gives you a sense of accomplishment and keeps the rest of the day from feeling overwhelming.

Set Boundaries for Interruptions

You're the go-to person for just about everything, which means interruptions are inevitable. But that doesn't mean you



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Seize Control of Your Workday

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have to be available 24/7. Set clear boundaries where you can—schedule blocks of uninterrupted time to focus on important work, and let your team know when you're available for questions. If an issue isn't urgent, encourage people to send an email or schedule a time to discuss it. You'll be surprised how much this cuts down on constant distractions.

Master the Art of Delegation

You don't have to do everything yourself. If you're handling tasks that others can manage just as well, it's time to delegate. Trust your team to handle routine administrative work, and empower them with clear instructions and expectations. Not only does this lighten your

load, but it also helps your team grow and take ownership of their responsibilities.

Use Technology to Your Advantage

Technology can be your best ally when it comes to time management. Use scheduling tools to organize your calendar, set reminders for deadlines, and automate repetitive tasks where possible. If your office management software has workflow automation features, take advantage of them to streamline processes and reduce unnecessary manual work.

Take Breaks to Stay Sharp

It might feel counterintuitive, but stepping away for even a few minutes can actually make you more productive. When you work nonstop, your focus and energy levels dip, making tasks take longer than they should. A short walk, a few minutes of deep breathing, or even just

Related Reading

- <https://www.lawofficemgr.com/what-were-overlooking-when-it-comes-to-time-management/>
- <https://www.lawofficemgr.com/how-to-schedule-time-for-time-management/>
- <https://www.lawofficemgr.com/how-to-avoid-taking-on-second-hand-stress/>

stretching at your desk can help you reset and return to work with fresh energy.

End the Day with a Reset

Before you leave for the day, take five minutes to review what you accomplished and set up a game plan for tomorrow. This helps you leave work feeling more in control and ensures that you start the next day with a clear direction. ■

Payroll: In-House or Outsourced?



Payroll is one of those tasks that feels deceptively simple—until you're the one responsible for it. It's high-stakes, time-sensitive, and leaves no room for error. The

decision to manage it internally or hire an outside provider deserves serious consideration.

There's no universal answer. The best option depends on your firm's size, budget, staffing, and appetite for risk. Here's how to break it down and make the call with confidence.

The Case for In-House Payroll

Keeping payroll inside the firm gives you full control. You

know the staff. You understand the pay schedules, bonuses, reimbursements, and the occasional unusual request. For smaller or simpler firms, internal payroll can make sense—especially if:

- **The team is small.** With just a few employees and minimal variation in hours, managing payroll may be manageable with the right software.

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Payroll: In-House or Outsourced?

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- **There's existing expertise.** If someone on staff already knows payroll rules, tax deadlines, and how to process deductions properly, you may not need to outsource.
- **Quick access to information matters.** When payroll is handled internally, questions can be answered quickly and changes made on the fly.
- **The structure is simple.** Salaried employees, little turnover, and predictable schedules all point to a lower-risk in-house setup.

The downside? One error—like a missed filing or incorrect deduction—can lead to penalties and unhappy employees. The margin for error is slim.



The Argument for Outsourcing

Outsourcing removes a major administrative burden. It saves time, improves accuracy, and helps ensure compliance. It's worth exploring this route if:

- **The firm is growing.** More people means more

complexity—especially with varying pay structures, benefits, and tax jurisdictions.

- **There's no in-house payroll expert.** Payroll isn't just about sending checks. It involves understanding tax filings, benefits administration, and compliance.
- **Reducing risk is a priority.** A payroll provider keeps up with ever-changing federal, state, and local laws so you don't have to.
- **Time is in short supply.** If payroll is just one of many competing responsibilities, outsourcing can free up resources for higher-level priorities.

While outsourcing comes with a fee, the cost is often offset by the time saved and the reduced likelihood of errors or compliance problems.

Questions to Help Decide

Still not sure which way to go? These questions can help clarify the right direction:

- **How complicated is the current payroll?** Do compensation models vary across roles? Are there bonuses, reimbursements, or multiple pay types involved?
- **Is there enough in-house capacity and know-how?** Who would handle payroll—and what happens if that person is out unexpectedly?
- **What's the true cost of doing it ourselves?** Don't forget to include staff time, training, software, and potential penalties for mistakes.



- **How important is responsiveness and access?** Do you need the ability to make last-minute changes or answer employee questions immediately?
- **What level of risk is acceptable?** Some firms are comfortable managing details internally, while others prefer the peace of mind of a third party handling it.

Making the Decision

The right payroll setup aligns with your firm's structure, resources, and risk tolerance. For some offices, keeping payroll in-house offers enough control and cost savings to make it worthwhile. For others, the consistency, accuracy, and reduced liability of outsourcing make it the better route.

The next two articles in this series will take the next step in each direction: one focuses on hiring a payroll specialist for in-house management, while the other explores how to successfully outsource payroll. Whichever path you choose, the end goal is the same—reliable, accurate payroll that keeps the team paid and the firm protected. ■

Making Legal Services More Accessible with Flex Payments

Legal services are often essential—but expensive. Many potential clients hesitate to seek help not because they doubt your firm's expertise, but because they're unsure how they'll afford it. That's where flex payments come in. Offering flexible payment options can expand your client base, increase collections, and build goodwill—without compromising your bottom line. Here's how to make it work.

Why Flex Payments Matter

Offering flex payments—structured arrangements that allow clients to pay legal fees over time—can be a game-changer. Not every client has the means to pay a large upfront retainer. With flex payment options, you open the door to clients who might otherwise walk away.

From a business standpoint, it's also a cash flow strategy. Instead of chasing unpaid balances or seeing potential clients disappear after an initial consult, you set up a predictable system where clients pay in smaller, manageable chunks. Even better: it builds trust and loyalty. Clients appreciate the effort to make services more affordable.

Building a System That Works

Implementing flex payments isn't just about saying yes

to payment plans. It's about creating a clear, consistent, and enforceable system that protects your firm while helping clients.

1. Define What You'll Offer

Decide what kinds of payment flexibility make sense for your firm. Options might include:

- Monthly or biweekly payment plans
- Sliding scale fees for lower-income clients



- Flat fees for certain services, paid in installments
- Third-party financing partnerships (like Affirm, LawPay Financing, or ClientCredit)

Be clear on whether you'll charge interest, require an initial down payment, or limit flex payments to specific case types.

2. Use Written Agreements

Never start a flex payment plan without a signed agreement. Spell out:

- Total fees

- Payment schedule (amount and due dates)
- Accepted payment methods
- Consequences of late or missed payments
- Termination or collection procedures

This protects the firm and avoids awkward misunderstandings later on.

3. Automate Where You Can

Use legal billing software that supports recurring billing or auto-pay features. Systems like Clio, MyCase, or PracticePanther can help schedule and track payments, send reminders, and reduce manual follow-up. Automation increases reliability—for you and for your clients.

4. Set Boundaries and Screen Carefully

Flexibility doesn't mean risking your firm's financial health. Screen clients to assess whether they're likely to meet payment commitments. You can also cap the number of active flex-payment clients at one time, or require a certain percentage up front before any work begins.

5. Train Staff and Communicate Clearly

Everyone at the firm should understand the payment policy and know how to explain it to clients. Consistency is key. ■