Simple Ways to Avoid a Claim

No	Item	Improvements
1.	Does your firm have an established **central diary system**?	- Diarise all important dates, eg court dates, submission dates, limitation period etc. - Designate a staff to supervise the diary to ensure immediate entry into the diary system and set appropriate reminders. - Make sure everyone in the firm has access, updates accordingly and set reminders for themselves.
2.	Do you run a **conflicts check** before taking on a matter?	- Maintain a client database for easy reference. Where applicable this should include, full name, identification number, company name, address, subject matter, lawyer-in-charge, file reference. - Send an email to everyone in the firm to check whether there is a potential conflict. This includes branches that you may have. - Make sure the database is updated by immediately including the new client's details in the database once a matter is taken up.
3.	Does your firm have **procedures in place**?	- Implement standard policies for handling files, managing client's complaints, handling client's accounts etc. - Make sure everyone in the firm is aware and understand the procedures that are in place.
4.	Is there any **review on paperwork** before it is submitted?	- Proof read before any document leaves the firm. If necessary, ask a colleague to check on your work. - Do not rely on templates or precedent work by the firm. - Check for any changes in Rules of Court, applicable forms etc. - Make sure the work prepared is as required and agreed by your client.
5.	Do you **issue engagement letters**?	- Clarify your job scope and what you will not do clearly with simple terms for the client to understand. - In the letter, include the lawyer-in-charge and who the client can contact should the lawyer is not available, agreed fee and any other aspects of the matter. - Make sure you receive your client's confirmation on your engagement letter before you start the matter to avoid any misunderstanding. - If you are not retained as a lawyer or merely giving preliminary advice, make sure a letter of non-engagement is sent to the person you met in order to protect yourself and your firm.
6.	Do you **use checklists**?	- Have a checklist for every area of work (eg conveyancing, litigation, will) and make sure everyone in the firm use it. - Every new file opened should have its own checklist on the front of the file. - Review the checklist regularly to include any update.