How a Simple Checklist can Improve Your Practice

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Checklists are a Tried and True Method for Getting Organized and the Job Done!

If clutter and "to do" reminders are invading your work space, it's time to **GET ORGANIZED**. And the best way to impose order, the experts say, is by creating a very simple **CHECKLIST**.

Yes, you read that right.

I'm not talking about the newest computer software program or mobile app. I'm talking about sitting down with a pen and paper and **WRITING A CHECKLIST**.

In his book *The Checklist Manifesto*, Dr. Atul Gawande identifies two kinds of errors: **errors of ignorance**, which we make when we don't know enough to do a job properly, and **errors of ineptitude**, which occur when we know how to do something but still manage to botch the job.

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While checklists can't make up for lack of knowledge, they CAN help us perform better at the office. **Checklists provide us with clear steps on how to execute tasks.**

So, how can you use checklists to improve your law practice? Here are some ideas provided by Laura Calloway in her article, **Improving Your Performance with Checklists**.

1. Choose an area of your practice that you would like to improve.

It can be anything from client intake to document review. A great place to start is to look back at a matter that you didn't handle as well as you would have liked. Pick one area at a time to concentrate on.

2. Determine key steps.

Don't list everything that can be done, just the most important elements and how the work of each team member must fit together. Ask yourself, what things must be done before you can move on to the next step? Focus particularly on elements that might be overlooked if things get hectic.

3. Stop and check your progress.

You will need to pause in the middle of your checklist to allow yourself time to go back and confirm that you've met each step. For example, Calloway says, "... a good pause point in an intake checklist would be after you've done your conflict of interest check and some preliminary investigation but before you've signed a fee agreement with the potential client."

4. Anticipate problems.

Think through all the things that could go wrong, or have gone wrong in the past. Then, develop a list of potential *solutions* to each problem. These potential steps will become your "backup" checklist to be pulled out in the event something goes awry.

5. Share the checklist.

If you're working with a team of attorneys, your checklist is not yours alone. It belongs to the team and should be shared appropriately. Be sure to revise it based on their input.

Sure, making a checklist will take a little extra work. But, it will be well worth it even for seasoned multitaskers who, like you and I, may drop the ball sometimes.

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