Tips for Law Firms Considering a Work Allocation Program

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It takes considerable time and resources to build any kind of work allocation system. When developing a program, Firms should consider the following:

- First, ensure there is buy-in from Firm management and key stakeholders by making the business case for a structured system. The proposal should include clear parameters for when the system must be used, and a monitoring mechanism to ensure compliance.
- Ensure the process and the ultimate work allocation system is user-friendly, efficient, and nimble. A work allocation program is less likely to be successful if lawyers are waiting too long for assignments to be made.
- Develop a change management plan that includes communications, education, and coaching, and consider incentives to drive compliance.
- Creation and maintenance of the system will require resources (both time and financial). Determine who will do the "hard work" of building and maintaining the system (i.e., business services or lawyers?).
- Create a template for assigning lawyers to briefly describe their matter and the time expected to complete the work.
- Appoint and train work allocation managers (either business services or lawyers) to oversee the program, monitor partner usage, and report to management.
- A strong allocation system will be supplemented by a competencies rubric, to ensure everyone has an opportunity to build out broad skills that will set them up for success. Engage practice groups in determining important competencies and skills.
- Determine who will be covered by the allocation program (i.e., all practice groups; all associates; only junior associates; students; only new clients/files to the Firm etc.)
- Consider whether it would be useful to do a pilot group run of the program, before rolling it out more broadly to the Firm.