


Time Management & Productivity System	Atticus Methods & Tools	Begin implementation on or before:	Complete implementation on or before:
<p>Planning Tools</p> <p><i>Step 1</i> in regaining control of your time, these forms are your roadmap to results – designed to capture your goals and form the foundation of your personal and professional life.</p>	Firm & Personal Mission Statement Sheet: Forms 12.01, 12.01A		
	Goal Grid: Form 12.01B		
	1 year Goals and Initiatives Sheet: Form 12.02		
	5 year Goals and Initiatives Sheet: Form 12.03		
	10 year Goals and Initiatives Sheet: Form 12.04		
	Tolerations: Form 12.05		
<p>Scheduling Tools</p> <p><i>Step 2</i> provides you with a tangible structure for managing your time. This system includes the Atticus Time Template, scripts to explain the template to staff, fifty weeks of forms to powerfully plan your week's goals, a pad of specially itemized to-do lists, signs to help you communicate clearly to potential interrupters that you are in Power Hour mode, and forms for your staff to update you quickly and efficiently.</p>	Time Template Samples; Common Time Blocks: Forms 13.01, 13.01A, 13.01B	Concepts / Tools	Concepts / Tools
	Time Template Worksheet: Form 13.02		
	Time Template Meeting Agenda: Form 13.03		
	Managing Interruptions Script for Attorney: Form 13.04		
	Phone Appointment Script for Staff: Form 13.05		
	Weekly Planning Pad: Form 13.06		
	Daily To-Do List Pad: Form 13.07		
	15-Minute Project Update Pad: Form 13.10		
<p>Managing Interruptions Forms</p> <p><i>Step 3</i> provides you with a system to protect yourself from interruptions. This system includes a log to track your daily interruptions and locate their source. Also included is the Question Batching Forms Pad – an excellent form to reduce staff interruptions and 2 forms to help you produce more powerful meetings.</p>	Interruption Log: Form 14.01		
	Interruption Analysis: Form 14.01A		
	Question Batching Forms Pad: Form 14.02		
	General Meeting Checklist: Form 14.03		
	General Meeting Agenda: 14.04		

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<p>Performance Tracking Forms</p> <p><i>Step 4</i> provides you with the tools to maximize your delegation skills and leverage your time – critical components to increasing your income and reducing your time in the office. This system also includes an organizer for monitoring your work in progress to help you regain control of your caseload.</p>	S.M.A.R.T Delegation Rules: Form 15.00		
	Delegation Form Pad: Form 15.01		
	Request for Assistance: Form 15.01A		
	Case Status Organizer: Form 15.02		
	Case File To-Do: Form 15.02A		
Client Development System	Atticus Methods & Tools	Begin implementation on or before:	Complete Implementation on or before:
<p>Atticus Client Development Circle</p>  <p>Referral System "Who to talk to"</p> <p><i>Step 1</i> in building a referral system that generates referral business reliably and predictably begins with all the forms you need to identify and manage your Top 20, keep track of their preferences, and your activities with them. Included is a form for tracking your own monthly marketing activities, or those of your team.</p>	Top 20 Influencers Roster: Form 18.01		
	Discovering Prominent Referral Sources: Form 18.01A		
	Influencers by Practice Type: Form 18.01B		
	Top 20 Exercise: Form 18.01C		
	Top 20 Influencer Profile Sheet: Form 18.02		
	Personal Information Script: Form 18.02A		
	Top 20 Influencer Contact History: Form 18.03		
	Monthly Marketing Activities Pad: Form 18.04		
	Top 20 Action Ideas: Form 18.05		
	Client Scorecard: Form 18.06		
	Potential Client Scorecard: Form 18.06A		
	A, B, C, D Client Matrix and Sample: Forms: 18.06B, 18.06C		
	Institutional Client Scorecard and Sample: Forms: 18.06D, 18.06E		
A, B, C, D Intake Flow Chart: Form 18.06F			
Potential Client Inquiry Call Script: Form 18.06G			
Inquiry Information Sheet: 18.06H			

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<p>Strategic Conversations “What to say” “How & when to say it”</p> <p>Step 2 in the process of developing a referral system is a series of scripts that support the strategic conversations critical to developing new business in a highly competitive environment. These scripts serve as a model for some and a departure point for others, but all are designed to maximize your ability to meet and cultivate referral sources.</p>	The Laser Talk: Form 19.01		
	The Interview: Form 19.02		
	Storytelling Tip Sheet: Form 19.03		
	Top 20 Appointment Scrip: Form 19.04		
	Appointment Script-Attorney w/ Attorney: Form 19.04A		
	Appointment Script-Staff w/ Staff: Form 19.05		
	Cross-selling Script: Form 19.06		
	Influencer Introduction Script: Form 19.07		
	Marketing Scripts: Form 19.08	Concepts / Tools	Concepts / Tools
<p>Client Development Support Tools</p> <p>Step 3 in building your referral system is the process of educating those who already send you business, to send you more and better referrals. Included here are marketing and cross-selling letter templates to customize and use to increase your income.</p>	Thank You Letter Samples: Form 20.01		
	Cross-selling Tips Sheet: Form 20.02		
	Sample Cross-selling Letters: Form 20.03		
	Alternate Cross-selling Letters: Form 20.04		
	Article Attachments: Form 20.05	Concepts / Tools	Concepts / Tools
<p>Marketing Event Tools</p> <p>Step 4 in the process of generating ongoing referrals is conducting group marketing events. In this section of the system, we give you step-by-step instructions for the planning, conducting and budgeting of a wide variety of marketing events. All of the events can be customized to suite any size practice. Included is a list of resources that provide logo items for firm giveaways.</p>	General Events Tip Sheet: Form 21.00	Concepts / Tools	Concepts / Tools
	Firm Golf Tournament: Form 21.01	Concepts / Tools	Concepts / Tools
	Reverse Seminar: Form: 21.02	Concepts / Tools	Concepts / Tools
	Firm Open House: Form 21.03	Concepts / Tools	Concepts / Tools
	Holiday Event: Form 21.04	Concepts / Tools	Concepts / Tools
	Marketing Event Guest List: Form 21.05	Concepts / Tools	Concepts / Tools
	Marketing Event Budget Form 21.06	Concepts / Tools	Concepts / Tools
	Common Influencers: Form 21.07	Concepts / Tools	Concepts / Tools
	Invitation Tips Sheet: Form 21.08	Concepts / Tools	Concepts / Tools
	Marketing Events Resources: Form 21.09	Concepts / Tools	Concepts / Tools

Staffing System	Atticus Methods & Tools	Begin implementation on or before:	Complete Implementation on or before:
<p>Pre-Recruiting Forms</p> <p><i>Step 1</i> in the Atticus Staffing System is a package of forms designed to help attorneys calculate their labor needs in order to maximize their profitability. Included in this set of forms are sample job descriptions, advertisements and assessment forms to help with the pre-recruitment process.</p>	Check Plan for Staffing: Form 1.00		
	Division of Functions Worksheet: Form 1.01		
	Labor Needs Assessment Form: Form 1.02		
	Sample Job Descriptions: Form 1.03		
	On-line Recruiting Sources: Form 1.04		
	Ad Examples – Administrator: Form 1.05		
	Ad Examples – Attorney: Form 1.06		
<p>Recruiting Forms</p> <p><i>Step 2</i> in building a championship staff is the process of choosing among the available candidates. Included in this section are tips to help you make that choice, a sample law office job application form, and a system for evaluating those you have interviewed.</p>	Choosing Among Candidates: Form 2.01		
	Interviewing Tips Sheet: Form 2.02		
	Application for Employment: Form 2.03		
	Interview Evaluation Form: Form 2.04		
	Thank You Letter: Form 2.05		
<p>Skills Tests & Orientation</p> <p><i>Step 3</i> in the Atticus Staffing System involves testing job candidates for effectiveness. Included in this section are actual Filing, Detail, Grammar and Proofreading tests you can use.</p>	Atticus Skills Assessment Series Instructions: Form 3.01		
	Atticus Skills Assessment Series Test Scores: Form 3.02		
	Filing Test: Form 3.03		
	Filing Test – Answer Sheet: Form 3.03b		
	Attention to Detail Test: Form 3.04		
	Attention to Detail - Answer Sheet: Form 3.04b		
	Grammar Test: Form 3.05		
	Grammar – Answer Sheet: Form 3.05b		
	Proofreading Test: Form 3.06		
Proofreading – Answer Sheet: Form 3.06b			

Staffing System	Atticus Methods & Tools	<u>Begin</u> implementation on or before:	<u>Complete</u> Implementation on or before:
<p>Orientation & Performance Tracking</p> <p><i>Step 4</i> in the process of creating a team involves orienting them initially and evaluating their performance once hired. Provided in this section are Orientation tips for setting new employees up for success and Performance Appraisal Forms for tracking their progress along the way. Also included is a sample Employee Warning Notice for early intervention.</p>	Orientation Tips: Form 4.00	Concepts / Tools	Concepts / Tools
	Performance Appraisal – Staff: Form 5.02		
	Performance Appraisal – Attorney: Form 5.03		
	Self-Appraisal: Form 5.04		
	Performance Expectations: 5.05a		
	Accomplishments & Contributions: Form 5.06		
	Time and Tally To-Do Pad: Form 5.06A		
	Employee Warning Notice: Form 5.07		
<p>Motivational Forms</p> <p><i>Step 5</i> in the Atticus Staffing System includes a set of acknowledgement tools to motivate and reward employees. Provided are actual award forms and “Time-Off” Coupons. In addition there are more than 50 reward ideas listed in all price ranges and a survey to determine which motivate your staff for maximum performance.</p>	Time Keeper Award	Concepts / Tools	Concepts / Tools
	Time-Off Coupon Pad	Concepts / Tools	Concepts / Tools
	Excellence Award	Concepts / Tools	Concepts / Tools
	Team Player Award	Concepts / Tools	Concepts / Tools
	50+ Rewards: Form 6.06	Concepts / Tools	Concepts / Tools
	Employee Reward Survey: Form 6.07		
Cash Flow System	Atticus Methods & Tools	<u>Begin</u> implementation on or before:	<u>Complete</u> Implementation on or before:
<p>Financial Foundation</p> <p><i>Step 1</i> in the Atticus Cash Flow and Profitability System provides a structured monthly financial calendar, a form for monitoring your firm’s investment on a case-by-case basis, and two sample monthly “Dashboards” for managing your firm finances with an emphasis on profitability.</p>	The “R.U.L.E.S.” Sheet: Form 7.01	Concepts / Tools	Concepts / Tools
	Monthly Financial Template: Form 7.02		
	Financial Case Status Report: Form 7.02A		
	Financial Template Worksheet: From 7.03		
	Sample Dashboard “A” Pad: Form 7.04		
	Sample Dashboard “B” Pad: Form 7.05		

Cash Flow System	Atticus Methods & Tools	Begin implementation on or before:	Complete Implementation on or before:
<p>Utilization & Leverage</p> <p><i>Step 2</i> in the system provides all the tools for analyzing how profitable your firm is according to the "Rule of Three". Also included are a variety of template Fee Agreements and Engagement Letters to systemize your intake process. (See also the Atticus Intake System) In addition, there are several samples of Non-Engagement Letters, a sample Declination Letter and a Disengagement Letter for eliminating C and D clients already in your practice.</p>	Utilization Tips Sheet: Form 8.00 Rule of Three Tips Sheet: Form 8.01	Concepts / Tools	Concepts / Tools
	Leveraging Worksheet: Form 8.02	Concepts / Tools	Concepts / Tools
	Intake Systems Form: Form 8.03	Concepts / Tools	Concepts / Tools
	Sample Hourly Fee Agreement: Form 8.03A Contingency Fee Agreement: Form 8.03B	Concepts / Tools	Concepts / Tools
	Sample Engagement Letter: Form 8.04 Alternate Engagement Letter: Form 8.04A	Concepts / Tools	Concepts / Tools
	Sample Non-Engagement Letter 1: Form 8.05 Sample Non-Engagement Letter 2: Form 8.05A Sample Non-Engagement Letter 3: Form 8.05B	Concepts / Tools	Concepts / Tools
	Sample Declination Letter: Form 8.05C Sample Disengagement Letter: Form 8.05D	Concepts / Tools	Concepts / Tools
<p>Collections System</p> <p><i>Step 3</i> in focuses on the Atticus Collections procedure. Provided as part of this system are tips on creating a "Designated Collector" to recover outstanding collectables owed to your firm and raise your effective hourly rate. There are techniques and scripts for the Designated Collector to use when negotiating with reluctant clients that include a range of options, including the use of credit cards. In addition there is a Value Corrosion Chart that illustrates the value curve from the client's perspective.</p>	Collections Tips Sheet: Form 9.01 Designated Collector Tips Sheet: Form 9.01A		
	Negotiating Tips Sheet: Form 9.01B		
	Replenishment Letter: Form 9.01C		
	5 to 10 Day Past Due Script: Form 9.02		
	Collection Call Scripts: Form 9.03 Arguments and Responses: Form 9.03A		
	The Payment Plan Script: Form 9.04		
	The Credit Card Option: Form 9.05		
	Tougher Measures Tips: Form 9.06 Value Corrosion Chart: Form 9.07		
<p>Expenses and Speed</p> <p><i>The last steps</i> in the "R.U.L.E.S." approach to Cash Flow and Profitability emphasize proper ratios of expenses to yearly revenues and techniques for speeding up the billing process to maximize profit.</p>	Expenses Tips Sheet: Form 10.00		
	Speed Tips Sheet: Form 11.00		