# OFFICE PROCEDURES MANUAL



#### RISK MANAGEMENT PRACTICE GUIDE OF LAWYERS MUTUAL

#### AN OFFICE POLICIES AND PROCEDURES MANUAL IS COMPOSED OF TWO DISTINCT SECTIONS.

THE MANUAL

The OFFICE POLICIES SECTION refers to rules and regulations, like employment, behavior, and inciement weather procedures.

2

THE OFFICE PROCEDURES SECTION documents administrative functions like file management, conflicts of interest checking, managing the trust account, calendaring, and routine activities like opening mail and answering the phone.

#### WRITING THE MANUAL

- Use simple language, Sentences 20 words or less.
- Have a detailed structure outline format.
- Use a positive tone.
- Compile information before you begin to write the manual.
- Avoid specific actions and instead focus on standard document preparation.
- Organize information into categories to give the manual structure.
- Create a production schedule.
- Edit for consistency.
- 9. Establish a review.

#### STANDARD FORMATS



Policies and standards on the following:

- Typography.
- Letters and Memos. Including fax cover sheets.
- Pleadings: include format rules dictated by the courts.
- Other Documents. This might include email formatting. forms, office signatures.

#### OFFICE STRUCTURE

- Introduction, include firm's mission.
  - Building Layout and Access. Maps of the building and office layout access to the office outside of business hours.
- Job Descriptions, Identify responsibility for jobs and tasks.
- Supplies and equipment, Location of supplies and equipment, and maintenance procedures.

#### OFFICE PROCEDURES

Detailed instructions on

- Security
- Emergency or Disaster
- Representing Firm
- Representing Clients
- Communications
- Filing System
- Docket Control System.
- Einances.

#### PERSONNEL POLICIES

- General Policies, include federal and state regulations.
- Employment, Classification, personnel files, disciplinary' termination terms.
- Conduct, include online behavior and use of office equipment and supplies.
- Hours of Work. Describe any telecommuting or alternate schedules.
- Benefits.
- Holidays and Paid Leave.

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# **Sales Office Procedures Manual Template**

**R Sandford** 

**Sales Office Procedures Manual Template:** 

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