Overview of assisting in prioritising and planning activities - Letter Two

Introduction

Each lawyer will have their own preference as to which events they expect you to record in their diaries. Usually you will be expected to record all the critical dates that relate to the matters that the lawyer is dealing with. You may also be required to record general events and appointments on behalf of a lawyer. Another responsibility that you may be given is the organisation of appointments.

Critical dates

Critical dates refer to dates that must be met for a matter. These dates are sometimes referred to as file related deadlines. It is very important that these dates are met. Therefore you need to ensure that you record the appropriate details correctly in the lawyer’s diary.

Critical dates include the following:

♦ Court appearances
♦ Settlement dates
♦ Document lodgement dates.

General dates

You may also be expected to record other more general events. These can include:

♦ Meetings with clients
♦ Travel arrangements
♦ Personal events.

Details

When you enter events in a lawyer’s diary you need to ensure that you accurately record the details that the lawyer needs. Each lawyer will have their own way of recording events and as you work with them you will begin to understand the information required. If you are ever unclear as to what information to record be sure to ask the lawyer.

Recording and arranging appointments

You may be expected to record the appointments that the lawyer needs to attend. If so you should ensure that the necessary details are entered in the diary.

As well as recording the appointments you may also be expected to arrange them. Ensure that you understand how to arrange appointments and the process of confirmation that you are expected to follow.

The “Prioritising and Planning Activities in a legal practice” book in the Library provides more information on maintaining lawyers’ diaries and arranging appointments.