

STAFF PROFESSIONALISM SELF-AUDIT

Audit Inquiry	Response and Explanatory Remarks	Improvement Strategy	Targeted Completion Date
1. When talking with clients or others not employed by the firm, do I always represent the firm in a professional manner?			
2. When interacting with clients am I a good “manager of first and last impressions” on behalf of the firm?			
3. Do I carefully guard client confidentialities at all times?			
4. Do I treat each client as I would like to be treated if I were the client?			

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5. Do I treat each task I perform in my work as representing a self-portrait of myself and my work ethic?			
6. When I answer the telephone, do callers get the impression that I am glad they called or that I am frustrated they have interrupted me?			
7. Do I project enthusiasm, caring, and interest when talking to clients?			
8. Do I refrain from offering clients legal advice even when I know the answer?			

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9. When passing messages containing legal advice from the lawyer to clients, do I remember to remind clients that the message is from the lawyer and that I am not the lawyer and, therefore, cannot give legal advice.			
10. Am I a good team player when my office peers need an extra hand?			
11. Do I speak respectfully about the lawyers when they are not present?			
12. Do I work at a pace that ensures a quality work product?			

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13. Do I talk about other staff members behind their backs?			
14. Even if I don't personally talk about others, do I willingly listen to other's gossip or do I discourage others from doing so?			
15. Do I accent the positives of my job or do I seem to focus primarily on the negatives?			
16. Do I remind myself often that it's the clients who pay our salaries?			

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17. Do I take the necessary time to organize myself and my work so that each day's top priorities are indeed accomplished?			
18. Besides satisfactorily meeting the requirement of my job description, can I name at least three additional contributions I have made to the firm over the past few months (e.g., cost-saving idea, a positive attitude, suggested a systems improvement, calmed a disgruntled or nervous client)?			
19. Am I respectful of other employees' firm responsibilities, their work areas, and their diversity of personalities?			
20. If I were a client, would I be satisfied having me as the staff person assigned to the case in light of the caliber of my work ethic, my professionalism, and my attitude?			

"...[Easy Self-Audits for the Busy Law Office by Nancy Byerly Jones is] one of the most valuable books I have read in 20 years on practice management" (J. Bennett, District of Columbia Bar Association Book Review August-September 1999)

This self-audit is an excerpt from the book, *Easy Self-Audits for the Busy Law Office*, by Nancy Byerly Jones (includes the "how to's" of simplified strategic planning, forms, checklists, article and more) published by the Law Practice Management Section of the ABA (a top ten best seller for many years). To order, please call 1-800-285-2221 (Order No.511-0420 or w/disks No. 511-0420D) or online at <http://www.abanet.org/lpm/catalog/511-0420.html>