

Delegating Tasks – Associate v. Paralegal v. Legal Assistant

The delegation of tasks within the law office is a difficult balance to strike; however, proper delegation and understanding of staff roles is vital to the profitable operation of your firm. Generally speaking, associates are responsible for substantive decisions and legal advice to be provided under the guidance of the managing attorney, then paralegals are responsible for billable legal work that can be delegated from the associate and legal assistants are responsible for the administrative support of the firm. Even still, paralegals should also know how to complete each of the tasks assigned to Legal Assistants and be willing to assist when necessary for timely completion of all client related tasks for the betterment of the firm.

The below chart includes examples of delegating tasks appropriately between your associate, paralegal and legal assistant. Upon initial review, it seems the Legal Assistant has more to do than anyone else, but upon closer review, you will note that the tasks assigned to the associate and paralegal take more time than those assigned to the Legal Assistant.

<u>Attorney/Associate</u>	<u>Paralegal</u>	<u>Legal Assistant</u>
<ul style="list-style-type: none"> • Manage trajectory and timeline of case • Review and substantively revise drafts from paralegal, including finalizing all pleadings and substantive correspondence • Legal research • Provide legal advice • Send all pleadings and correspondence received to Legal Asst with cc to paralegal for review, calendaring, saving to client's file, etc. 	<ul style="list-style-type: none"> • Review drafts from Legal Assistant • Review drafts from Associate • Draft substantive letters (e.g. 6.4b letter, letter regarding issues in case, etc.) • Draft substantive pleadings (e.g. Motions, Petition for Contempt, Petitions for Modification, discovery responses/requests, etc.) • Review and revise pre-draft pleadings from Legal Assistant • Substantive telephone calls • Send all pleadings and correspondence received by e-mail to Legal Asst for proper saving/printing in client's file <p style="text-align: center;">Do not scan, copy or print anything. Send those tasks to Legal Assistant.</p>	<ul style="list-style-type: none"> • New client intake and scheduling consultations • Prepare Fee Agreements • Draft cover letters (i.e. enclosed please find letter to Clerk, Judge, OC, etc.) • Finalize and serve letters or pleadings to OC, Judge, Clerk, etc. (i.e. – scan, copy, e-mail, U.S. Mail, e-filing by PeachCourt or Odyssey, etc.) – includes proofreading everything! • Scheduling, follow up or basic telephone calls with clients, OC, Court, etc. • Maintain client files (e-file and hard file) • Management of Atty's Calendar • Pre-draft basic pleadings, including: <ul style="list-style-type: none"> ▪ Entry of Appearance/Substitution of Counsel ▪ Verifications ▪ Summons/Case Filing Form; ▪ Complaint for Divorce ▪ Motion for Judgment on the Pleadings (with Affidavit) ▪ Final Judgment and Decree (settled) ▪ Motion for Withdrawal (Notice/Order) ▪ Rule 5.2 Certificate of Service