LEGALSONE FIELD GUIDE

SOP Starter Kit for Small Law Firms

A reusable structure plus starter checklists for intake, matter opening, billing, file closing, and client communication.

USE THIS WITH	OWNER	REVIEW DATE
Firm leadership and operations	____________________	____________________

The one-page SOP structure

Use the same structure for every procedure.

[ ] Purpose and scope are clear in two sentences or less.

[ ] Trigger and responsible role are named.

[ ] Required systems, information, and approvals are listed.

[ ] Steps are numbered and use action verbs.

[ ] Exceptions and escalation paths are explicit.

[ ] Definition of done and quality check are stated.

[ ] Owner, version, and next review date are visible.

Client intake SOP

Create a consistent path from inquiry to decision.

[ ] Capture source, contact details, matter type, and urgency.

[ ] Acknowledge the inquiry and assign an owner.

[ ] Run the approved conflict-check process.

[ ] Collect structured consultation information.

[ ] Document accept, decline, or follow-up status.

[ ] Record required notices and communication preferences.

Matter opening SOP

Start every matter with complete controls.

[ ] Confirm signed engagement and approved fee arrangement.

[ ] Create matter name, number, type, and responsible attorney.

[ ] Apply team access and special restrictions.

[ ] Create folders, tasks, deadlines, and templates.

[ ] Configure billing, trust, and reporting fields.

[ ] Run a 48-hour opening audit.

Billing and collections SOP

Make the monthly cycle visible and repeatable.

[ ] Publish time-entry and review deadlines.

[ ] Resolve missing time and unusual expenses.

[ ] Review narratives, guidelines, discounts, and trust balances.

[ ] Approve and deliver invoices on schedule.

[ ] Assign follow-up and record payment commitments.

[ ] Review cycle time, corrections, and aging.

File closing SOP

Close the operational, financial, and records loop.

[ ] Confirm final work and client communication.

[ ] Resolve balances, trust funds, and vendor costs.

[ ] Return or retain property and documents as required.

[ ] Apply retention and disposition rules.

[ ] Remove unnecessary access and recurring tasks.

[ ] Record closure reason and lessons learned.