

Increasing Practice Efficiency

Learn how to substantially increase the efficiency of your operation from successful practitioners who've mastered the process. This session will draw on real-world examples of firms that have established ongoing process improvement initiatives as a basis for gaining practice efficiency. You will learn the importance of reviewing procedures regularly, best practices in technology utilization and strategic outsourcing, and how to implement an action plan to standardize these practices across the firm.

Session Outline:

- I. Digital Work Environment
 - a. Dual monitors
 - b. Scanners
 - c. Document management
 - d. Engagement software
 - e. Practice management
 - f. Remote access
 - g. Workflow management
- II. Workflow
 - a. What is Workflow?
 - b. The Workflow Problem
- III. Process Improvement
 - a. Document current workflow
 - b. Define best practices
 - c. Flowcharts and procedure manuals
 - d. Test the new process
 - e. Train your staff
 - f. Gather feedback
 - g. Case Study
- IV. Standardization
 - a. Automates processes
 - b. Understands roles
 - c. Enforces quality compliance
 - d. Reports progress
 - e. Captures knowledge
- V. Sourcing Strategies
 - a. Seasonal work balancing
 - b. Client perception: Time vs. Value
 - c. Options