

Steps to Meet Our Obligation to Plan Ahead for Clients — Whether in the Midst of a Pandemic or Otherwise

Lawyers have an obligation to plan ahead to ensure that client service will continue without interruption, no matter the circumstances. The ongoing COVID-19 crisis provides a timely reminder of the importance of succession planning—whether it is a pandemic or getting hit by the proverbial bus that prevents us from being able to represent our clients. While succession planning often falls by the wayside, it is important and not as onerous as it may seem. Simple steps lawyers in any practice and at any level can begin implementing in their practice include:

1. Preparing Summary Memoranda on Key Issues

Maintaining a running list of open projects that addresses all of the key issues someone would need to know to step into a litigation or deal—such as the status and location of communications with opposing counsel on a litigation or deal, project timelines, and legal research findings—is an easy way to ensure continuity of client service.

2. Preparing an Onboarding Packet for New Lawyers

An onboarding packet for incoming lawyers to the case or deal is handy to have anytime transition is necessary. This could consist of an introductory memorandum describing the case and its issues, a guide to where the relevant files are located, and, where applicable, who on the case or deal team is responsible for particular workstreams on a matter.

3. Creating a Guide to the Electronic or Hardcopy Client File

In addition to storing documents for client matters (including key communications) in an accessible and organized manner, consider preparing a guide of where and how materials are saved. This information will permit another lawyer or client to readily and efficiently locate what they need from the client file.

4. Integrating Additional Counsel Wherever Possible

Where possible, consider involving additional attorneys in the management of a case or deal so that they are prepared to suddenly take on primary responsibility for a project.

5. Scheduling Regular Team Update Calls

Scheduling regular calls is a good way to ensure that other lawyers are aware of—and working towards—the client's strategic goals. This can save hours of scrambling should one of the only lawyers with a bird's eye view of the matter be unavailable.

6. Knowing Your Email Retention Policy and Organize Your Inbox

Ensuring that key emails are preserved and organized in a logical way allows someone stepping into the matter to access your inbox and find relevant communications that have not been saved elsewhere. Knowing your email retention policies is an important first step to make sure that electronic information others may need to understand the matter is not destroyed, inadvertently or as a routine practice.

For more information on the steps to meet your obligations to clients, see the article, *A Lawyer's Guide To Client Service Continuity Planning*, written by Axinn lawyers Thomas G. Rohback, Craig M. Reiser, and Eva Yung, and published in *Law360*. Learn more at [Axinn.com](https://www.axinn.com).