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WSSFC 2026

Practice Management Track – Session 7

Spring Cleaning is Not Just for Spring: Clean Processes Are Productive Processes

Presented By:

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About the Presenters...

Erin R. Ogden is a trademark and copyright nerd who loves helping businesses grow. Whether helping clients directly or working with other attorneys to help their clients, she helps identify, protect, and monetize intellectual property while looking at the business holistically. Her firm's points of culture are Make things as simple as possible, but no simpler; Play well with others; Speak English, not legalese; and Be the reason it works. She loves putting that into practice with her colleagues and business clients. Drop her a line or connect on social media. We'll nerd out together!

Lethina Stephens, LPM, PMP, CSM, is the Legal Project Manager at OG+S Law. She holds a B.A. in Communication with a minor in Technical Writing from Kaplan University, where she graduated Magna Cum Laude. Prior to her work in legal operations, Ms. Stephens held leadership and project management roles in software, financial services, and technology organizations, where she successfully managed enterprise projects, product launches, and business process improvement initiatives. She is dedicated to helping solo and small law firms improve efficiency, strengthen workflows, and build scalable systems for growth. With expertise in process improvement, project management, technology implementation, and organizational change, she works with attorneys and legal professionals to reduce operational bottlenecks, improve accountability, and enhance the client experience. She maintains both and Accredited Legal Project Manager (LPM) and Certified Project Manager (PMP) and actively shares her insights on LinkedIn. While not working, Lethina enjoys reading, taking wildlife pictures, hiking, working at her local voting poll, and volunteering within her community and volunteers when she can.

Spring Cleaning is Not Just for Spring: Clean Processes are Productive Processes

Clearing the clutter in intake, files, and workflows

Erin R. Ogden and Lethina Stephens, OgdenGlazer, LLC

INTRODUCTION

We have to have good processes and clean files. If we do not, we are inviting chaos and worse. We are going to talk about how to build and maintain good processes for better outcomes.

WHY DO WE CARE?

First, the Rules of Professional Conduct for Attorneys require us to care. Specifically, the following rules and comments show that we need to have good processes.

- **SCR 20:1.3 Diligence**
  A lawyer shall act with reasonable diligence and promptness in representing a client.
  - Select AMA Comments
    [2] A lawyer's work load must be controlled so that each matter can be handled competently.
    [3] Perhaps no professional shortcoming is more widely resented than procrastination. A client's interests often can be adversely affected by the passage of time or the change of conditions; in extreme instances, as when a lawyer overlooks a statute of limitations, the client's legal position may be destroyed. Even when the client's interests are not affected in substance, however, unreasonable delay can cause a client needless anxiety and undermine confidence in the lawyer's trustworthiness. A lawyer's duty to act with reasonable promptness, however, does not preclude the lawyer from agreeing to a reasonable request for a postponement that will not prejudice the lawyer's client.
- **SCR 20:1.4 Communication**
  (a) A lawyer shall: (1) Promptly inform the client of any decision or circumstance with respect to which the client's informed consent, as defined in SCR 20:1.0(f), is required by these rules; (2) reasonably consult with the client about the means by which the client's objectives are to be accomplished; (3) keep the client reasonably informed about the status of the matter; (4) promptly comply with reasonable requests by the client for information; and (5) consult with the client about any relevant limitation on the lawyer's conduct when the lawyer knows that the client expects assistance not permitted by the Rules of Professional Conduct or other law. (b) A lawyer shall explain a matter to the extent reasonably necessary to permit the client to make informed decisions regarding the representation.
  - Select AMA Comments
    [1] Reasonable communication between the lawyer and the client is necessary for the client effectively to participate in the representation.

[2] If these Rules require that a particular decision about the representation be made by the client, paragraph (a)(1) requires that the lawyer promptly consult with and secure the client's consent prior to taking action unless prior discussions with the client have resolved what action the client wants the lawyer to take. For example, a lawyer who receives from opposing counsel an offer of settlement in a civil controversy or a proffered plea bargain in a criminal case must promptly inform the client of its substance unless the client has previously indicated that the proposal will be acceptable or unacceptable or has authorized the lawyer to accept or to reject the offer. See Rule 1.2(a). [3] Paragraph (a)(2) requires the lawyer to reasonably consult with the client about the means to be used to accomplish the client's objectives. In some situations — depending on both the importance of the action under consideration and the feasibility of consulting with the client — this duty will require consultation prior to taking action. In other circumstances, such as during a trial when an immediate decision must be made, the exigency of the situation may require the lawyer to act without prior consultation. In such cases the lawyer must nonetheless act reasonably to inform the client of actions the lawyer has taken on the client's behalf. Additionally, paragraph (a)(3) requires that the lawyer keep the client reasonably informed about the status of the matter, such as significant developments affecting the timing or the substance of the representation. [4] A lawyer's regular communication with clients will minimize the occasions on which a client will need to request information concerning the representation. When a client makes a reasonable request for information, however, paragraph (a)(4) requires prompt compliance with the request, or if a prompt response is not feasible, that the lawyer, or a member of the lawyer's staff, acknowledge receipt of the request and advise the client when a response may be expected. A lawyer should promptly respond to or acknowledge client communications.

[5] The client should have sufficient information to participate intelligently in decisions concerning the objectives of the representation and the means by which they are to be pursued, to the extent the client is willing and able to do so. Adequacy of communication depends in part on the kind of advice or assistance that is involved. For example, when there is time to explain a proposal made in a negotiation, the lawyer should review all important provisions with the client before proceeding to an agreement. In litigation a lawyer should explain the general strategy and prospects of success and ordinarily should consult the client on tactics that are likely to result in significant expense or to injure or coerce others. On the other hand, a lawyer ordinarily will not be expected to describe trial or negotiation strategy in detail. The guiding principle is that the lawyer should fulfill reasonable client expectations for information consistent with the duty to act in the client's best interests, and the client's overall requirements as to

the character of representation. In certain circumstances, such as when a lawyer asks a client to consent to a representation affected by a conflict of interest, the client must give informed consent, as defined in Rule 1.0(e). [6] Ordinarily, the information to be provided is that appropriate for a client who is a comprehending and responsible adult. However, fully informing the client according to this standard may be impracticable, for example, where the client is a child or suffers from diminished capacity. See Rule 1.14. When the client is an organization or group, it is often impossible or inappropriate to inform every one of its members about its legal affairs; ordinarily, the lawyer should address communications to the appropriate officials of the organization. See Rule 1.13. Where many routine matters are involved, a system of limited or occasional reporting may be arranged with the client. Withholding Information [7] In some circumstances, a lawyer may be justified in delaying transmission of information when the client would be likely to react imprudently to an immediate communication. Thus, a lawyer might withhold a psychiatric diagnosis of a client when the examining psychiatrist indicates that disclosure would harm the client. A lawyer may not withhold information to serve the lawyer's own interest or convenience or the interests or convenience of another person. Rules or court orders governing litigation may provide that information supplied to a lawyer may not be disclosed to the client. Rule 3.4(c) directs compliance with such rules or orders.

- **SCR 20:5.1 Responsibilities of partners, managers, and supervisory lawyers**
  A partner in a law firm, and a lawyer who individually or together with other lawyers possesses comparable managerial authority in a law firm, shall make reasonable efforts to ensure that the firm has in effect measures giving reasonable assurance that all lawyers in the firm conform to the Rules of Professional Conduct.
  A lawyer having direct supervisory authority over another lawyer shall make reasonable efforts to ensure that the other lawyer conforms to the Rules of Professional Conduct.
  A lawyer shall be responsible for another lawyer's violation of the Rules of Professional Conduct if: (1) the lawyer orders or, with knowledge of the specific conduct, ratifies the conduct involved; or (2) the lawyer is a partner or has comparable managerial authority in the law firm in which the other lawyer practices, or has direct supervisory authority over the other lawyer, and knows of the conduct at a time when its consequences can be avoided or mitigated but fails to take reasonable remedial action.
  - Select AMA Comments
    [2] Paragraph (a) requires lawyers with managerial authority within a firm to make reasonable efforts to establish internal policies and procedures designed to provide reasonable assurance that all lawyers in the firm will conform to the Rules of Professional Conduct. Such policies and procedures include those designed to detect and resolve conflicts of interest, identify dates by which actions

must be taken in pending matters, account for client funds and property and ensure that inexperienced lawyers are properly supervised.

[3] Other measures that may be required to fulfill the responsibility prescribed in paragraph (a) can depend on the firm's structure and the nature of its practice. In a small firm of experienced lawyers, informal supervision and periodic review of compliance with the required systems ordinarily will suffice. In a large firm, or in practice situations in which difficult ethical problems frequently arise, more elaborate measures may be necessary. Some firms, for example, have a procedure whereby junior lawyers can make confidential referral of ethical problems directly to a designated senior partner or special committee. See Rule 5.2. Firms, whether large or small, may also rely on continuing legal education in professional ethics. In any event, the ethical atmosphere of a firm can influence the conduct of all its members and the partners may not assume that all lawyers associated with the firm will inevitably conform to the Rules.

[5] Paragraph (c)(2) defines the duty of a partner or other lawyer having comparable managerial authority in a law firm, as well as a lawyer who has direct supervisory authority over performance of specific legal work by another lawyer. Whether a lawyer has supervisory authority in particular circumstances is a question of fact. Partners and lawyers with comparable authority have at least indirect responsibility for all work being done by the firm, while a partner or manager in charge of a particular matter ordinarily also has supervisory responsibility for the work of other firm lawyers engaged in the matter. Appropriate remedial action by a partner or managing lawyer would depend on the immediacy of that lawyer's involvement and the seriousness of the misconduct. A supervisor is required to intervene to prevent avoidable consequences of misconduct if the supervisor knows that the misconduct occurred. Thus, if a supervising lawyer knows that a subordinate misrepresented a matter to an opposing party in negotiation, the supervisor as well as the subordinate has a duty to correct the resulting misapprehension.

[6] Professional misconduct by a lawyer under supervision could reveal a violation of paragraph (b) on the part of the supervisory lawyer even though it does not entail a violation of paragraph (c) because there was no direction, ratification or knowledge of the violation.

[8] The duties imposed by this Rule on managing and supervising lawyers do not alter the personal duty of each lawyer in a firm to abide by the Rules of Professional Conduct. See Rule 5.2(a).

And that doesn't even include those that talk about how we know who the client is, when the representation starts, and when it ends!

Second, a well-run firm is a profitable one. It allows us to use more attorney time to do billable work. It lets staff be more productive (and that usually means less staff). Perhaps more importantly, it lets everyone take time off without coming back to dumpster fires.

HOW DO WE DO IT?

Hire or make a Lethina clone. Then communicate, communicate, communicate.

🧭 OPENING QUESTION

Let's start with a quick reality check:

- How many of you feel like your matters are… reactive?
- How many of you have:
    - Duplicate emails?
    - Unclear next steps?
    - Files that technically aren't… closed?

👉 *That's not a people problem. That's a process problem.*

⚠️ THE REAL ISSUE

Attorneys aren't disorganized. They're overloaded.

What happens:

- We focus on delivering legal work
- "Cleanup" gets pushed aside
- Systems quietly accumulate clutter

👉 Result:

- Slower turnaround
- Missed steps
- Frustrated clients
- Frustrated teams

🧱 WHAT IS "PROCESS CLUTTER"?

Process clutter = hidden inefficiency

Examples:

- Duplicate intake information
- Tasks living in email, not systems
- Matters with no defined next step
- Files that are "almost done"
- Inconsistent workflows across attorneys

🔍 WHERE CLUTTER LIVES

Four High-Impact Areas:

1. Intake
2. Active Client Files
3. Dockets & Task Management
4. Closing Files

👉 Today = how to clean and maintain each one

🧩 SECTION 1: INTAKE

🚪 INTAKE: THE FRONT DOOR

Messy intake = messy matters

Common issues:

- Missing information
- Rework and follow-up emails
- Delayed matter start
- Misaligned expectations

✅ CLEAN INTAKE SYSTEM

What clean intake looks like:

- Standardized intake forms
- Required fields (no guessing later)
- Defined intake workflow
- Clear ownership

👉 Intake should answer:

- What are we doing?
- Who is involved?
- What happens next?

🛠️ PRACTICAL FIXES

- Use a single intake source (no duplicate entry)
- Build a checklist:
    - Client contact confirmed
    - Scope identified
    - Documents collected
- Automate follow-up requests where possible

💡 *Small fix → big downstream impact*

🗂️ SECTION 2: CLIENT FILES

📁 CLIENT FILE REALITY

Ask yourself:

- Can your team open any file and know:

- Status?
- Next step?
- Responsible person?

If not → clutter exists.

❌ COMMON FILE BREAKDOWNS

- Notes in email, not in system
- No consistent file organization
- Tasks not tied to matter stages
- "I thought someone else was doing that…"

✅ CLEAN FILE STRUCTURE

A clean file includes:

- Clear matter stages
- Assigned responsibility
- Visible next step
- Organized documents

👉 If someone else stepped in—they should not have to guess

🛠️ PRACTICAL FIXES

- Standardize matter stages (e.g., Intake → Active → Closing)
- Use consistent naming conventions
- Require task ownership
- Build "next step required" into workflows

💡 *Clarity reduces interruptions*

🗓️ SECTION 3: DOCKETS & TASKS

⏳ THE INVISIBLE BOTTLENECK

Work doesn't stop—it sits.

Why?

- Tasks not assigned
- Deadlines not tracked
- Work stuck in inboxes

🚨 SIGNS OF CLOGGED SYSTEMS

- "Just following up…" emails
- Missed or rushed deadlines
- Last-minute urgency
- Attorneys acting as project managers

✅ CLEAN DOCKET SYSTEM

- Every task has:
  - Owner
  - Due date
  - Clear deliverable
- System tracks—not memory

🛠️ PRACTICAL FIXES

- Tie tasks to matter workflows
- Use recurring templates for repeat work
- Eliminate "orphan tasks"

- Conduct weekly workflow review (light, not heavy)

💡 *You don't need more effort—you need visibility*

✅ SECTION 4: CLOSING FILES

🔒 THE MOST OVERLOOKED STEP

Closing files is where clutter multiplies.

Unclosed files create:

- Risk
- Confusion
- Incomplete client experience

❌ WHAT "NOT CLOSED" LOOKS LIKE

- No confirmation to client
- Loose ends in system
- Tasks still open
- Billing uncertainty

✅ CLEAN CLOSING PROCESS

A closed file includes:

- Final client communication
- Confirmation of completion
- All tasks resolved
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🛠️ PRACTICAL FIXES

- Standard “closing checklist”
- Closing letter template
- Automatic task closure workflow
- Archive or tag completed matters

💡 *Closing properly creates confidence—for everyone*

🔄 MAINTAINING CLEAN SYSTEMS

Spring cleaning is not a one-time event

Make it sustainable:

- Monthly file audits (light touch)
- Quarterly workflow review
- Continuous refinement

👉 Progress, not perfection

📊 IMPACT OF CLEAN PROCESSES

When systems are clean:

✅ Faster turnaround
✅ Fewer internal questions
✅ Better client experience
✅ Easier billing conversations
✅ Less stress

🧠 THE BIG SHIFT

This is not about doing more work.

It’s about:

Removing friction from the work you already do.

🎯 TAKEAWAYS

Start with ONE:

- One intake fix
- One workflow
- One closing process

👉 Momentum comes from small wins

💬 CLOSING LINE

“Clients don’t see our internal chaos—
but they feel the effects of it.”

Let’s make sure what they feel is clarity.

🙌 Q&A

Spring Cleaning is Not Just for Spring: Clean Processes are Productive Processes

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🎯 **Spring Cleaning is Not Just for Spring**
Clean Processes = Productive Processes

Subtitle: Clearing the clutter in intake, files, and workflows

Presenter Names (You + Partner)

🧭 **OPENING QUESTION**

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🙌 Q&A

🎁 BONUS

✅ Audience worksheet ("Spring Cleaning Checklist for Law Firms")

LAW FIRM SPRING CLEANING CHECKLIST: Clean Processes = Productive Processes

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INTAKE

☐ Standard intake form used consistently
☐ Required information collected before opening matter
☐ Single intake source used
☐ Ownership assigned for each intake step
☐ Follow-ups automated or tracked
☐ Client expectations clearly communicated

CLIENT FILES

☐ Naming conventions followed
☐ Folder structure organized and consistent
☐ Duplicate documents removed
☐ Matter status visible
☐ Next step identified
☐ Responsible team member assigned

DOCKET & TASKS

☐ Every task has an owner
☐ Every task has a due date
☐ Deliverables clearly defined
☐ No overdue tasks without action plan
☐ No orphaned or inactive tasks
☐ Weekly docket review completed

FILE CLOSING

☐ Legal work completed
☐ Final invoice sent
☐ Outstanding balances addressed
☐ Closing letter sent
☐ Final documents delivered
☐ Matter formally marked closed
☐ File archived and retention requirements noted

MONTHLY AUDIT

☐ Random active files reviewed
☐ Intake workflow compliance checked
☐ Overdue tasks reviewed and reassigned
☐ Inactive matters identified
☐ Completed matters closed promptly
☐ Forms, templates, and workflows updated

☐ **SUCCESS CHECK**

☐ Next steps visible in all active matters
☐ Duplicate information reduced
☐ Deadlines consistently managed
☐ Files easy to navigate
☐ Matters closing on time
☐ Billing confusion minimized
☐ Client experience improved
☐ Staff stress reduced

Wisconsin Solo & Smal Firm Conference 2026
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Erin R. Ogden & Lethina Stephens, Ogden Glazer + Schaefer

Additional Resources

- https://www.linkedin.com/pulse/spring-cleaning-isnt-just-why-clean-processes-make-better-stephens-lvu3e/

Spring cleaning is not just for spring.

Clean processes are productive processes.

Erin R. Ogden and Lethina Stephens
OgdenGlazer, LLC

Solo and Small Firm Conference 2026

01

1

The problem isn't disorganization. It's overload.

"Cleanup" loses to urgent legal work—then clutter quietly compounds.

01 **Legal work takes priority**
The work is real and time-sensitive.

02 **Cleanup gets deferred**
Loose ends remain in email and memory.

03 **Systems accumulate clutter**
Duplicate data, unclear next steps, open files.

04 **Clients and teams feel it**
Slower turnaround, missed steps, frustration.

Source: user-provided workshop outline

02

2

It is easy to defer.

01 **Legal work takes priority**
The work is real and time-sensitive.

02 **Cleanup gets deferred**
Loose ends remain in email and memory.

03 **Systems accumulate clutter**
Duplicate data, unclear next steps, open files.

04 **Clients and teams feel it**
Slower turnaround, missed steps, frustration.

Source: user-provided workshop outline

02

3

Clutter hides in four handoffs.

A matter stays clean only when each transition has a clear standard and owner.

01	02	03	04
INTAKE	**ACTIVE FILE**	**TASKS + DOCKET**	**CLOSING**
Missing information	No visible next step	Work stuck in inboxes	Loose ends remain

ONE SYSTEM **Four handoffs. Every handoff needs ownership.**

Source: user-provided workshop outline

03

4

Clean intake starts with three questions.

WHAT ARE WE DOING?

WHO IS INVOLVED?

WHAT HAPPENS NEXT?

Small fixes → big downstream impacts

Source: user-provided workshop outline

04

5

A clean file reveals status, owner, and next step.

STATUS	OWNER	NEXT STEP
Where is the matter now?	Who is responsible?	What moves it forward?

Required task ownership

Organized documents in-system

Documented movement

Source: user-provided workshop outline

05

6

Work moves when every task has three things.

OWNER + **DUE DATE** + **DELIVERABLE**

SYSTEM TRACKS IT — NOT MEMORY

Source: user-provided workshop outline

06

7

Visibility beats urgency.

If someone else stepped in, they should not have to guess.

01 Tie tasks to matter workflows

02 Use templates for repeat work

03 Eliminate orphan tasks

04 Run a light weekly review

Source: user-provided workshop outline

06

8

A matter is not finished until the closing loop is complete.

Closing is where clutter—or confidence—compounds.

Closing properly creates confidence—for everyone – now and in the future.

07

9

Clean systems stay clean through a light operating rhythm.

Progress, not perfection: Review just often enough to prevent drift.

MONTHLY

Light file audits
Spot stale tasks and unclear status.

QUARTERLY

Workflow review
Remove repeated friction and handoff gaps.

CONTINUOUS

Refinement
Update checklists as the work changes.

The goal is not a major cleanup. It is a system that does not quietly decay.

Source: user-provided workshop outline

08

10

Less friction.
More legal work.

Clean processes improve the work clients can feel.

The shift is not "do more."
It is "remove what slows the work."

01 **Faster turnaround**

02 **Fewer internal questions**

03 **Better client experience**

04 **Easier billing conversations**

05 **Less stress**

Source: user-provided workshop outline

09

11

Start with one process this week.

Clients may not see our internal chaos—but they feel its effects.

Let's make sure what they feel is clarity.

Choose a small win, assign an owner, and make the next step visible.

10

12

Questions

How? Ask Lethina

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Why? Ask Erin

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