



***Conference Session:***

**IMPROVING OFFICE EFFICIENCIES**

**with**

**Kathy Wachsmann**

**Lynda Stahl**

**and John Wachsmann (moderator)**

**Saturday, April 18, 2015**

**8:15 AM to 9:15 AM**

# 4/18: Improving Office Efficiencies

**IMPROVING OFFICE EFFICIENCIES with Kathy Wachsmann and Lynda Stahl, moderated by John Wachsmann**

**Date:** Saturday, April 18, 2015

**Time:** 8:15 AM to 9:15 AM

## **SESSION DESCRIPTION:**

Two experienced staff members, non-attorneys discuss from their perspective how their firms work. They have worked in law firms that have serviced significant legal plan clients. They explore how their offices do it. They will cover the idea of a paperless office, file setup, case management, time keeping and billing. Further they will cover their office telephone systems, billing, and attorney support. They will explain how they keep the attorneys in line.

## **ABOUT THE SPEAKERS:**

**Lynda Stahl** has worked in law firm Legal Plan Administration for over 25 years. She is experienced in the internal arrangements of law firms engaged in the delivery of Group Legal Service as well as the procedures for maintaining the law firm-plan relationship most recently. Lynda served as the Legal plan administrator in a firm which served clients of a dozen national, regional and local legal plans and groups.

**Kathy Wachsmann** is the office manager of Wachsmann and Associates, P.C. in Englewood, Colorado. Wachsmann & Associates as a firm has 25 years' experience working with multiple legal plans. Kathy has been an office manager for 12 years. Her office has three attorneys, one full-time paralegal, one law clerk, and herself as the office manager who does all the billings to the legal plans and public clients. Public clients are what she calls clients who have no legal plan affiliation. The legal plans Wachsmann and Associate works with are Hyatt Legal Plans, ARAG, UAW, Countrywide, Prepaid Legal Services, Inc. and Union Privilege. The company serves both public and plan clients.

Improving Office Efficiencies  
Kathy Wachsmann  
April 18, 2015  
8:15 AM - 9:15 AM

Agenda  
(Approximately 15 Minutes)

1. Introduce myself and workplace.
2. Legals plans we work with.
3. Paperless office
4. Case management system - Amicus
5. Answering telephone calls
6. Setting up appointments
7. Client Data Sheets
8. Setting up files
9. Fee Agreements
10. Billing Statements