

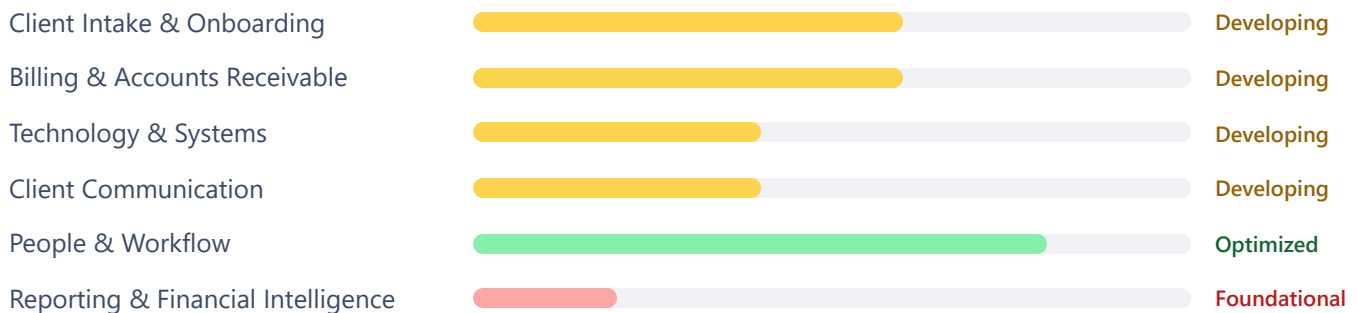
Seinfeld Law Professional Corporation

Jerry Seinfeld · PCLaw · Hourly / Fixed Fee · Other tools: Microsoft 365, Docusign, Closer, OneDrive, QBO



Building Momentum

Seinfeld Law Professional Corporation is performing well in people and workflow, but financial reporting represents the clearest opportunity for improvement.



Executive Summary

STRENGTHS

- Trust accounting is compliant with Law Society requirements.
- Conflicts checks are completed and documented before onboarding.
- Engagement letters are signed before any work begins.
- New inquiries are consistently responded to within 24 hours.

KEY OPPORTUNITIES

- **Client Intake & Onboarding:** Intake data is not yet connected to the practice management system, requiring manual re-entry.
- **Reporting & Financial Intelligence:** No regular financial dashboard or management report is being reviewed by leadership.
- **Client Intake & Onboarding:** Client intake forms are not yet standardized across the firm.

Area-by-Area Assessment

Client Intake & Onboarding

Developing

WHAT'S WORKING

- Conflicts checks are completed and documented before onboarding.
- Engagement letters are signed before any work begins.
- New inquiries are consistently responded to within 24 hours.

OPPORTUNITIES

- **Client intake forms are not yet standardized across the firm.**
A consistent intake form eliminates missed information and signals professionalism from the first touchpoint — typically saving 2–3 hours per new file.
 - **Intake data is not yet connected to the practice management system, requiring manual re-entry.**
This is one of the highest-leverage improvements available to a growing firm. Connecting intake to your PMS eliminates errors, saves time on every new file, and creates the foundation for document automation — a core area of ClearPoint's implementation work.
-

WHAT'S WORKING

- Invoices are issued on a consistent, documented schedule.
- Trust accounting is compliant with Law Society requirements.
- Clients have access to online payment options.

OPPORTUNITIES

- **Time entry is not consistently captured same-day or within 24 hours.**
Delayed time entry is the single largest source of write-offs in small firms. Same-day capture routinely increases billable recovery by 10–15%.
 - **Outstanding AR is not being reviewed and actioned on a regular monthly basis.**
AR that isn't actively managed doesn't get collected. A monthly AR review — even 30 minutes — typically reduces outstanding balances by 20–30%.
-

WHAT'S WORKING

- Practice management software is in active, consistent use across the firm.
- A document management system is in place and actively used.

OPPORTUNITIES

- **Staff are not receiving regular training on the tools they use.**
Most firms use less than 40% of their software's features. Targeted training sessions typically unlock significant efficiency gains at no additional cost.
- **Data backup processes are not automated or not being tested regularly.**
Untested backups are not backups. A data loss event without a verified recovery plan can be catastrophic for a firm of any size.
- **No formal cybersecurity policy exists, or it has not been communicated to staff.**
Law firms are high-value targets for phishing and ransomware. A basic policy covering passwords, phishing awareness, and device rules can be drafted and communicated in a single afternoon.

ClearPoint Legal Consulting works across all major practice management platforms — from selection and evaluation through to configuration, migration, and staff training.

WHAT'S WORKING

- Each client's preferred contact method is documented.
- Response time standards exist and are consistently met across the firm.

OPPORTUNITIES

- **Clients are not consistently receiving proactive updates on their matters.**

Clients who don't hear from their lawyer assume nothing is happening. Proactive update protocols — even a brief weekly touchpoint — dramatically reduce complaints and improve satisfaction scores.

- **Client satisfaction is not being collected at file close.**

Firms that collect feedback systematically improve faster and generate more referrals. A two-question survey at file close is all it takes to start.

- **No documented complaints process is currently accessible to clients.**

A documented complaints process is a Law Society requirement and a signal of professionalism. Without it, complaints are handled inconsistently and reactively.

WHAT'S WORKING

- Job roles and responsibilities are clearly documented for all positions.
- Workload is reviewed regularly by leadership.
- Performance reviews occur at least annually for all staff.
- Succession and coverage plans exist for all key roles.

OPPORTUNITIES

- **No structured onboarding process currently exists for new staff.**

Undocumented onboarding means every new hire learns differently. A basic checklist reduces ramp-up time and improves early retention.

WHAT'S WORKING

- All billable timekeepers have documented annual targets.

OPPORTUNITIES

- **Realization rates are not being tracked or reviewed on a regular basis.**

Realization rate is the most direct measure of billing efficiency. Firms that track this consistently identify write-off patterns early and recover significant revenue annually.

- **Utilization rates are not being monitored for lawyers and paralegals.**

Utilization is the clearest measure of capacity and workload balance. Without tracking it, firms can't identify underutilized talent or prevent burnout before it happens.

- **Collection rates are not being monitored or measured against targets.**

Collection rate is the final step in converting work into revenue. Firms that benchmark this consistently collect an average of 15–20% more than those that don't track it.

- **No regular financial dashboard or management report is being reviewed by leadership.**

Running a firm without regular financial reporting is like flying without instruments. A monthly dashboard covering realization, utilization, collection, and AR gives leadership the visibility needed to make confident decisions — and is a high-value area where ClearPoint can help rapidly.

Practice Management System Selection

Selecting and implementing a practice management system is one of the most consequential technology decisions a firm will make. The right platform — properly configured — touches every area assessed in this report: intake, billing, document management, communication, and financial reporting.

ClearPoint has deep implementation experience helping firms evaluate, select, migrate to, and get the most out of their platform.



ClearPoint holds certified partner status with both Clio and CosmoLex — covering selection support, data migration, configuration, and staff training across both platforms.

Recommended Action Plan

The matrix below plots each identified gap by impact and effort. The prioritized action plan that follows lists every recommendation exactly once — Client Intake & Onboarding leads, followed by highest-impact items.

High Impact, Low Effort

Client Intake & Onboarding: Client intake forms are not yet standardized across the firm.

Client Communication: Clients are not consistently receiving proactive updates on their matters.

Reporting & Financial Intelligence: Realization rates are not being tracked or reviewed on a regular basis.

Reporting & Financial Intelligence: No regular financial dashboard or management report is being reviewed by leadership.

Billing & Accounts Receivable: Time entry is not consistently captured same-day or within 24 hours.

High Impact, Higher Effort

Client Intake & Onboarding: Intake data is not yet connected to the practice management system, requiring manual re-entry.

Technology & Systems: Staff are not receiving regular training on the tools they use.

People & Workflow: No structured onboarding process currently exists for new staff.

Lower Impact, Low Effort

Billing & Accounts Receivable: Outstanding AR is not being reviewed and actioned on a regular monthly basis.

Client Communication: No documented complaints process is currently accessible to clients.

Reporting & Financial Intelligence: Collection rates are not being monitored or measured against targets.

Reporting & Financial Intelligence: Utilization rates are not being monitored for lawyers and paralegals.

Lower Impact, Higher Effort

Technology & Systems: Data backup processes are not automated or not being tested regularly.

Client Communication: Client satisfaction is not being collected at file close.

Technology & Systems: No formal cybersecurity policy exists, or it has not been communicated to staff.

The recommendations below are organized by priority — not by sequence. Priority 1 items are your highest-value opportunities and deserve the most attention, but that doesn't mean everything else waits. In practice, a firm will often be working a Priority 1 initiative over several months while steadily closing Priority 2 and 3 items in parallel. Think of priority as a signal of importance and focus, not a step-by-step timeline.

Priority	Area	Recommended Action
Priority 1	Client Intake & Onboarding	This is one of the highest-leverage improvements available to a growing firm. Connecting intake to your PMS eliminates errors, saves time on every new file, and creates the foundation for document automation — a core area of ClearPoint's implementation work.
Priority 1	Client Intake & Onboarding	A consistent intake form eliminates missed information and signals professionalism from the first touchpoint — typically saving 2–3 hours per new file.
Priority 1	Client Communication	Clients who don't hear from their lawyer assume nothing is happening. Proactive update protocols — even a brief weekly touchpoint — dramatically reduce complaints and improve satisfaction scores.
Priority 1	Reporting & Financial Intelligence	Running a firm without regular financial reporting is like flying without instruments. A monthly dashboard covering realization, utilization, collection, and AR gives leadership the visibility needed to make confident decisions — and is a high-value area where ClearPoint can help rapidly.
Priority 1	Billing & Accounts Receivable	AR that isn't actively managed doesn't get collected. A monthly AR review — even 30 minutes — typically reduces outstanding balances by 20–30%.
Priority 1	Technology & Systems	Most firms use less than 40% of their software's features. Targeted training sessions typically unlock significant efficiency gains at no additional cost.
Priority 2	Reporting & Financial Intelligence	Collection rate is the final step in converting work into revenue. Firms that benchmark this consistently collect an average of 15–20% more than those that don't track it.

Priority	Area	Recommended Action
Priority 2	Reporting & Financial Intelligence	Utilization is the clearest measure of capacity and workload balance. Without tracking it, firms can't identify underutilized talent or prevent burnout before it happens.
Priority 2	Reporting & Financial Intelligence	Realization rate is the most direct measure of billing efficiency. Firms that track this consistently identify write-off patterns early and recover significant revenue annually.
Priority 2	Billing & Accounts Receivable	Delayed time entry is the single largest source of write-offs in small firms. Same-day capture routinely increases billable recovery by 10–15%.
Priority 2	People & Workflow	Undocumented onboarding means every new hire learns differently. A basic checklist reduces ramp-up time and improves early retention.
Priority 2	Technology & Systems	Law firms are high-value targets for phishing and ransomware. A basic policy covering passwords, phishing awareness, and device rules can be drafted and communicated in a single afternoon.
Priority 3	Technology & Systems	Untested backups are not backups. A data loss event without a verified recovery plan can be catastrophic for a firm of any size.
Priority 3	Client Communication	Firms that collect feedback systematically improve faster and generate more referrals. A two-question survey at file close is all it takes to start.
Priority 3	Client Communication	A documented complaints process is a Law Society requirement and a signal of professionalism. Without it, complaints are handled inconsistently and reactively.

ClearPoint holds certified partner status with Clio and CosmoLex, and works across all major practice management platforms.

Ready to Turn This Into a Plan?

Book a free 30-minute discovery call with Michael Stephens. We'll walk through your results, answer your questions, and outline exactly what a focused engagement would look like for Seinfeld Law Professional Corporation.

[Book Your Discovery Call](#)

Michael@ClearPointLegalConsulting.ca · clearpointlegalconsulting.ca

Prepared by ClearPoint Legal Consulting for Seinfeld Law Professional Corporation. This report is provided for informational and reference purposes, based on self-reported answers collected during a complimentary assessment.