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PRACTICE MAKES PERFECT

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BUSINESS INFORMATION FOR EVERYONE IN PRACTICE MANAGEMENT

RULING YOUR RISKS

NATASHA RAWLEY, THE FILE QUEEN

The File Queen is back! My apologies for the absence, but over the past few months I've been wading through some huge onsite projects within our legal community, waving my information management and organisation magic wand!

In the October issue we discussed why 'information management' within your legal practice is so important. We translated the term information governance (IG), which means that if you hold information, you must control and govern it – not just through security, which ensures external people such as hackers can't access it, but internally too. There must be robust control systems in place which your practice should continually review, enforce and evaluate.

This month, the FQ grants you your first gift of 2015 – a tool to tackle IG within your legal practice and gain control over all of your firm's information. May I present to you, your Information Asset Register (IAR, for short)! www.archivestorage.net/IAR

What is this, I hear you cry? This downloadable tool is the first step towards information governance within your firm – and it means peace of mind for you and the partnership. The National Archives defines an IAR as "a mechanism for understanding and managing an organisation's assets and the risks to them". It's basically a register for all the information your firm needs to function, practice and make profit, from physical client and finance files, to spreadsheets containing information about client files/records, legal practice management systems, iPhones/Blackberrys, data backup tapes and so on. In short, your firm's assets.

The first step is to find your firm's information assets. I know this sounds like a huge task but the example on our downloadable user guide will show you what one looks like.

While you're creating your IAR, here are the FQ's top tips:

● **What is the information you need to function?** Look at the checklist on www.archivestorage.net/IAR to get you started.

● **Embrace and get involved with other team members** – they will be able to help you brainstorm.

● **Have an information asset amnesty!** There are so many places inside a legal practice where information is kept – hidden index cards with client will/deed details, securities spreadsheets with information of files kept in one of the partner's offices, data backup tapes with your IT company or stored with the managing partner. The link has a great template of an email you can send out – adapt and use it.

● **Keep the IAR structure simple.** This will be your baby and as you've created it from scratch you'll be the one with the most knowledge on the tool. Yet when it comes to presenting your findings to the partners, you need to keep the tool clean and simple. Have two versions if necessary.

Why are we doing this? I want you to be the practice manager that can hold their head up high and say: 'Yes, File Queen! I can confirm that here at Jones Smith & Co we have an information governance policy in place, whereby we evaluate security levels and access levels, test security of our back-up and offsite storage and enforce deletion of information in line with the practice's record retention policy and information policy.'

You must be proactive about this. There are big changes coming our way, and not just through changes to the Data Protection Act and 'the right to be forgotten', but through information policy enforcement from regulators and clients. You and your firm must be prepared. **LPM**

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