



Practice Support Resources Legal Services Excellence Standard (LSES)

Law Society of Ireland

March 2024



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Introduction

To assist practitioners in applying for the Legal Services Excellence Standard (LSES) Law Society Practice Support has identified a large range of resources to assist each practitioner in researching and applying for the standard. These resources are solely aimed at providing guidance and direction for practitioners to develop their own tailored and customised documents and evidence to assist in audit preparation for subsequent assessment in applying for the standard.

Law Society Practice Support recommends that each practitioner read and download the **Documents and Templates** to assist in developing their resources to apply for the LSES Standard.

For queries please contact lses@lawsociety.ie

*Please note these resources are subject to change are not meant to be exhaustive. The Law Society of Ireland can accept no responsibility for any practitioner's application for the Legal Services Excellence Standard.

1.0 Business Planning, Development and Continuity

1.1 Mission Vision Values

[Guide How to write a business plan](#)

[Business Plan Template](#) (Download)

[Small Practice Growth Strategy Workbook](#)

Library booklists

- [Business Skills for lawyers](#)
- [Running a Solicitors' Practice](#)

1.2 Legal Structure

[Legal Structure Partnership Agreement Template](#) (Download)

Law Society [Information on Setting up Partnership](#)

[LSRA Limited Liability Partnerships](#)

Watch Practice Support Information Session:

[The LSRA and Limited Liability Partnerships](#)

1.3 Operational Structure, Human Resources Plan

Documented Roles and Responsibilities of all staff see [business plan template](#)

Law Society [Member of Staff Contract Template](#)

Create a [Organisation Chart](#)

[Emergency succession planning in a sole practitioner's or principal's firm – second edition](#)

1.4 Financial Plan

Financial Planning [business plan template \(pg 21\)](#)

Financial Planning [Ready Reckoner Tool](#)

Watch Practice Support Information Session:

[Financial Planning Top Tips](#)

[Maximise Practice Profitability](#)

1.5 Business Development Plan

[Law Society Business Growth Options](#)

[Law Society Small Practice Growth Strategy Workbook](#)

[Law Society Marketing Workbook](#)

Watch Practice Support Information Session:

[Marketing Tips from Law Firm Marketing Club](#)

[Marketing Plans and Growth Strategies](#)

[Moving Sales Online and Marketing Tips](#)

1.6 Insurance

[Insurance PII](#)

[Law Society Sec 150 Guidance](#)

[Law Society Sec 150 Precedents July 2021](#)

[Terms and Conditions of Business 2017](#) Latest Edition

[Practice management precedents](#)

Watch Practice Support Information Session:

[PII Special Purpose Fund](#)

[Applying for PC Renewal 2024](#)

1.7 Leases, Plant and Equipment

[Business Plan template](#) (Page 18)

Law Society [GDPR & Data protection](#)

Law Society [GDPR Guidance and templates](#)

Law Society [GDPR Firm Processor Template](#)

1.8 Measurement and Review of Targets

Law Society [Performance Management Plan Template](#)

Law Society [Guidance and Ethics Supports](#)

Law Society [Precedents and other Supports](#)

1.9 Business Interruption Disaster and Business Continuity

Business Continuity Planning [Business Plan template](#) (page 27)

Law Society [10 Steps for Planning for disaster](#)

Law Society [Emergency succession planning in a sole practitioner's or principal's firm – second edition](#)

Law Society [Legal Structure Partnership Agreement Template](#) (Download)

Law Society [Legal Agreement providing for temporary management of sole practitioner/principal](#) (Download)

1.10 Succession Planning

Law Society [Guidance and Ethics 4th Ed Succession Planning](#) (page 115)

Law Society [Making a Will](#)

Law Society [EPA Guidance Practice Note](#)

Law Society [Legal Agreement providing for temporary management of sole practitioner/principal](#) (Download)

2.0 Infrastructure

2.1 Operational Systems Management

Law Society [Benefits of a case management system](#)

Law Society [Case Management Systems Practical Advice](#)

Watch Practice Support Information Session:

[Review Case Management Systems](#)

2.2 Regulatory requirements relating to firm data

Law Society [GDPR & Data protection](#)

Law Society [GDPR Guidance and templates](#)

Law Society [Ten Steps in Managing Data Protection in your firm](#)

Law Society [Guidance and Ethics 4th Ed Succession Retention and Destruction of Files](#)
page 113

Law Society [Solicitor Accounts Regulations 2003](#)

Law Society Archive [Retention of Files](#)

Law Society Practice Note [Legal Professional Privilege](#)

Law Society [Guidance and Ethics 4th Ed Privilege and Confidentiality between solicitor and Client](#) (page 49-58)

Law Society [Anti Money Laundering obligations for Solicitors](#)

Law Society [Anti Money Laundering Guidance and Resources](#)

Law Society [Guide to risk management procedures and professional indemnity insurance](#)

2.3 Data Security and Management

Law Society [10 steps in managing data and data protection in your firm](#)

Law Society [Quick tips for ensuring confidentiality in the use of technology](#)

Law Society [Cybersecurity Fundamentals](#)

Watch [Cyber Security & Technology Tools to Protect Your Office](#)

Watch [How Secure Is Your Office Front Door?](#)

2.4 Confidentiality Policies

Law Society [Member of Staff Contract Template](#)

Law Society [Guidance and Ethics 4th Ed Privilege and Confidentiality between solicitor and Client](#) (page 49-58)

2.5 Communication Procedures

[Checklist for Social Media Policy](#)

Law Society [Guidance and Ethics 4th Ed Professional Names and Professional Note paper](#) (page 108-112)

Law Society [Guidelines solicitors advertising regulations](#)

Law Society [Practising Law Society Member Logo](#)

Law Society downloadable resources:

- [Disclaimer Template](#)
- [Leaflet on Websites](#)
- [Privacy Policy Template](#)
- [Terms & Conditions Template](#)
- [Website set-up / templates](#)
- [Practitioner Experience of Developing a Website](#)

3.0 Operational Systems - Client Care

3.1 Quality Assurance Policy

Law Society [Ten Tips for Client Care](#)

Law Society [Developing and preserving positive client relationships](#)

Law Society [Guide to risk management procedures and professional indemnity insurance](#)

Law Society [Complaints against solicitors](#)

Law Society [Handling Complaints](#)

Law Society [Leaflet - Handling complaints and support tools available](#)

Law Society [Privacy Statement for Solicitors regarding Complaints and Client Relations](#)

3.2 Managing Clients Expectations

Law Society [Guidance and Ethics 4th Ed Chapter 2](#)

Law Society [Letter of Engagement Terms and Conditions](#)

Law Society [Precedents and other Supports](#)

Law Society [Client Care Service Statement](#)

Law Society [Section 150 Precedent Letters \(updated July 2021\)](#)

Law Society [Letter of Disengagement](#)

Law Society [Client Care Leaflets](#)

3.3 Communications with Clients

Law Society [Developing and preserving positive client relationships](#)

3.4 Vulnerable Clients

Law Society [Guidance and Ethics 4th Ed Chapter 2](#) page 27-29

Law Society [Dealing with Vulnerable Clients](#)

Law Society [Practice Notes](#)

3.5 Conflict Checks

Law Society [Guidance and Ethics 4th Ed Chapter 3](#) page 35

3.6 Credit Control and Risk Assessments

(Downloadable resources)

Law Society [Setting up an Undertakings Policy](#)

Law Society [Undertaking Register](#)

Law Society [Critical Dates management](#)

Law Society [Critical Dates Spreadsheet Template for Personal Injury Litigation](#)

Law Society [Debt Collection Instruction Sheet Template](#)

Law Society [Wills Instruction Sheet Template](#)

Law Society [Work-in-Progress - Monitoring Spreadsheet Template](#)

Law Society [Anti Money Laundering obligations for Solicitors](#)

Law Society [Anti Money Laundering Guidance and Resources](#)

4.0 Human Resources, Competence & Knowledge Management

4.1 Human Resource Management

Law Society HR Responsibilities [Business Plan template](#) page 9

Law Society [Performance Management Plan Template](#)

4.2 Staff Resource Planning and Recruitment

Law Society [Recruitment and Selection guidelines](#)

Law Society [Recruitment & Selection Interview Structure](#)

Law Society [Dignity at Work Toolkit](#)

Law Society [Hiring staff](#)

Law Society [Legal Vacancies](#)

Law Society [Managing staff](#)

Law Society [Search CV Registers](#)

4.3 Staff Induction

[Staff Induction Guidance](#)

4.4 Professionalism and Recognition

[Performance Management guideline.](#)

[Performance and Time Management](#)

4.5 Effective Internal Communications

Employees are clear on the communication etiquette when dealing with internal and external communications.

4.6 HR Processes, Policies and Procedures

[Disciplinary Policy Template](#)

[Grievance Policy](#)

[Health and Safety policy](#)

[Maternity Protection Policy Template](#)

[Parental Leave Policy Template](#)

4.7 Health, Psychological Safety and Wellbeing

[Law Society's Professional Wellbeing Charter.](#)

[Psychological Wellness](#)

[Dignity at Work](#)

[Legal Mind](#)

[High Impact Professional](#)

4.8 Diversity, Equality and Inclusion

[Gender Equality, Diversity and Inclusion](#)

4.9 Professional Development to include mentoring and CPD

[CPD Requirement 2024](#)

- [Download the 2024 Scheme booklet](#)
- [Download and save the 2024 CPD Scheme record card](#)
- [View detailed information on the 2024 CPD Cycle](#)

4.10 Learning and Development Evaluation and Planning

[Business Plan Template \(Download\)](#)

[Small Practice Growth Strategy Workbook](#)

Library booklists

- [Business Skills for lawyers](#)
- [Running a Solicitors' Practice](#)

4.11 Knowledge Resource Management (Library, precedents, templates)

Law Society [Knowledge Base](#)

- [Practice Areas](#)
 - [Practice Notes](#)
 - [Precedents](#)
 - [Buy publications](#)
 - [Library](#)
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Disclaimer -The information contained above is intended to furnish practitioners with general information and guidance in relation to any application for the Legal Services Excellent Standard. It is not intended to replace or serve as a substitute for any professional advice, consultation or service and the Law Society of Ireland shall not be responsible for any practitioner's application for the Standard. While the information in the links provided has been verified to the best of our ability we cannot guarantee there are no errors and the Law Society of Ireland assumes no responsibility or liability for any errors or omissions in the content.