

REFERRALS AND QUALITY ASSURANCE PROTOCOL

Goal: To assure that the needs of clients of **LEI** member firms needs are timely, efficiently and effectively met and satisfied, **LEI** has created and implemented Referrals and Quality Assurance Protocols. The actual Protocols are located in the Members Only portion of this website. A high level Executive Summary is presented below for your understanding of the requirements, discipline and care that **LEI** has constructed and member firms are required to observe to assure that clients' needs are seamlessly and efficiently serviced across the world.

Means to Assure Efficient, Cost-Effective and Top Quality Service of Clients' Needs:

1. Clarity of Work Referred

LEI has devised a procedure to assure that **(a)** the member firm initiating the referral on behalf of the client does so in an efficient and clear way; **(b)** the receiving firm processes the request in a timely, clear and unambiguous way; and the **(c)** the exact timing, scope of services and costs for the client are clearly mapped out. While there are many steps in this process, some key considerations include clear delineation of:

- Sense of urgency
- Scope of work
- Budget
- Other understandings set forth in an engagement letter

2. Free 30 Minute “No Meter Running” Consultation Policy

Allows your attorney at an **LEI** member firm to have preliminary consultations with other member firms on your behalf at no cost.

3. Integrity of Work Delivery

LEI strives to assure that member firms keep their word and commitments. This builds and reinforces trust. Major components include means to strive to assure that the referred matters are delivered:

- On time
- On budget
- Efficient staffing
- Advance communication with client if time and budget cannot be met and reasons why
- Indemnity insurance proper for jurisdiction

4. Quality of Work

LEI's Protocol devises means to assure the best quality work product:

- Personnel Assigned Have Proper Training
- Personnel Assigned Have Sufficient Experience
- Practical Solutions
- Proper Supervision

5. Enforcement of Quality

Despite these safeguard, member firms are not always perfect. **LEI** therefore has procedures for elevating complaints to assure any disagreements are promptly resolved and chances of future recurrence are minimized.

