



GBA Practice Management  
Case History Form

Author's Name/Title \_\_\_\_\_

Firm Name \_\_\_\_\_

Firm Location (Street/City/State) \_\_\_\_\_

Office Phone \_\_\_\_\_

Mobile Phone \_\_\_\_\_

E-Mail Address \_\_\_\_\_

Date Submitted \_\_\_\_\_

Committee/Council \_\_\_\_\_

Brief Descriptive Title (keywords only) \_\_\_\_\_

**Principal Audience:** Let us know which members of a geoprofessional firm would, in your opinion, benefit most from using your case history. Select all that apply:

- |  |                                    |
|--|------------------------------------|
| firm principals/leaders                  | human-resources staff              |
| branch-office managers/regional managers | accounting/bookkeeping staff       |
| discipline leads,                        | safety staff                       |
| project managers                         | professional-development personnel |
| (in general, or by discipline area)      | sales/marketing personnel          |
| laboratory technicians/managers          | other                              |

**Background:** Please provide brief background information describing what happened from the onset to that point where problems develop. Provide the information in a summarized fashion, identifying who did or did not do what; the impact of such action or inaction; what happened next; and so on. You may be helped by answering the questions who, what, when, where, how, and why, not necessarily in that order. GBA will provide writing, editing, and graphics support.

**Problems and Outcomes:** Please provide a brief summary of the problems encountered during the project and how they were overcome. (e.g., “We terminated the person because his productivity and attention to detail had started to decline, while his salary continued to increase. I suspect we could have separated a bit more gracefully, but, in any event, he filed an age-discrimination lawsuit against us. Our insurance was truly insufficient to handle the exposure well, but our agent had not explained that to us. We met with our attorney. She told us that it would cost us \$50,000 to \$75,000 to prove we were blameless She suggested that we offer a token settlement of \$25,000, while being prepared to spend as much as \$50,000, payable over two years. She suggested that we could look to our insurance agent as a source of recovery; we declined.”)

**Lessons Learned:** It’s important to know “up front” about the lessons you learned, because that information guides development of the case, in terms of facts included or omitted (some facts don’t matter to the case when it is considered an educational tool), material that is emphasized or deemphasized, and so on. Some of the lessons commonly learned are listed below. Select all that apply:

- |   |  |
|---|--|
| act in haste and repent at leisure                | limit the firm’s liability                   |
| avoid doing favors                                | make appropriate staff assignments           |
| balance risk with conservatism                    | manage staff expectations                    |
| cheap services can be expensive                   | obtain assistance from your attorney         |
| communicate actively to resolve problems          | obtain assistance from your insurer          |
| consider the risk of economic downturn            | practice in your expertise                   |
| document promises made orally                     | purge project files                          |
| don’t stick your head in the sand                 | resolve disputes before they become lawsuits |
| good people don’t always stay that way            | retain a private detective when needed       |
| invest in staff training/professional development | understand risk vs. reward                   |
| know when to call the police                      | use appropriate and concise language         |
| know when to settle                               | use appropriate limitations                  |
| learn about your direct reports                   | other  |