

**SUCCESSFUL SMALL FIRM
PRACTICE COURSE - 2019 -
Week Day Sessions**

Sept. 9	Session One	Objectives	Topics	Materials and Resources	Discussion Questions	Assignment
	Introduction to the Course & Small Firm Law	An understanding of small firm law and the resources of the DC Bar.	The small firm world, ethics, discipline and Bar resources.	Public opinion polls about the legal profession. Slides with snapshots of program pages.	How do you think lawyers are perceived by the public?	Review the Business Plan template.
	The Choice	Reflection on the choice to go small firm. Discerning the purpose of the venture; defining the ideal client; problem solving for the ideal client.	Discussion of characteristics of a small firm lawyer; cost benefit analysis; choosing a practice area and problems to solve.	Business Plan for the law office- defining the practice area.	How many of you are currently small firm practitioners? How many of you are considering going small firm because that has always been your dream? How many of you are considering going small firm as a result of the disappointing job market? What do you want to practice?	Review the Business Plan Workbook.
	Lawyer as Entrepreneur/ The Business Plan	Understanding the entrepreneurial mindset for the small firm; identify strengths and weaknesses; reflect on what business task should be outsourced; explore thought provoking questions with the class. Explore the Business Plan.	Discussion of Lawyer vs. Entrepreneur. Differences between the two; importance of business thinking; planning is key.	Business Plan and the self evaluation process.	Our shared characteristics. Are you a lawyer or entrepreneur? Are you a people person? Are you able to empathize? Why is empathy important? Are you both strategic and detail oriented?	Prepare the small firm mission statement.
Sept. 16	Session Two					
	Nuts and Bolts - Launching the Small Firm	An understanding of the essentials of starting a small firm.	Discussion on firm name; tax ID number; business entity; insurance; office options and the essentials for the launch.	Information from DCRA; virtual office and office-on-demand options; discussion of cloud based vs. server based set up	What do you think you need to get started? What are your biggest concerns about launching? Dealing with fear and other obstacles.	Organize your launch: how to set priorities.
Sept. 23	Session Three					
	Ethics and Small Firm Management	An understanding of firm management; ethical implications of not establishing systems; how to create systems; tools for creating work flow and project management.	The necessity of systems and how to implement them, such as: file creation and management; case management; conflicts checks; office polices and procedures; time management and time-and-billing applications.	Legal Ethics Opinions and disciplinary actions relating to law firm management.	Why do small firm lawyers generate nearly half of the docketed bar complaints in DC?	Review of the bar complaint form.
Sept. 30	Session Four					

	Banking	How to handle money in the small firm.	The types of bank accounts; account management; & risks of mismanagement; creating an operating reserve & cash flow issues.	DC Rules of Professional Conduct	What types of accounts do you need? Options for managing the accounts.	
	Fee Setting	An understanding of setting fees and timekeeping and billing.	Discussion of the value of problem solving; value of billable hour; P=R-E; hourly rates; charging for administrative work; time keeping and billing systems.	In Re Mance- flat fees; In Re Martin-contingency fees/reasonableness/disputed fees (ACAB); Laffey matrix	What is a reasonable fee to charge your clients? How do you determine that amount? What is your time worth? What is the value of a productive hour? Is there profit in your price?	
Oct. 7	Session Five					
	Fee Agreements	An understanding of how to draft fee agreements.	Discussion of elements of fee agreements; important clauses; terms and alternate clauses.	Examples of fee agreements.	What should you address in your fee agreements?	Prepare free agreements for your firm.
	Billing	An understanding of the billing process, the marketing opportunity in the invoice, the importance of accuracy in billing and billing options and applications.	Discussion of invoicing; collections; marketing opportunity in invoicing; billing applications; and credit card payments.	How to talk about fees; the best time and the worst time to collect a fee.	How do you plan to get paid? How often will you bill your clients? What types of fee arrangements do you plan to take (flat fee; hourly; contingency)?	Design your invoicing system.
Oct. 21	Session Six					
	Client Relations	An understanding of how to deal with prospective clients; how to close the deal; how to manage clients; how to identify problem clients; how to get rid of problem clients and cases; and client communication issue.	Discussion of client relations; problem clients; referral source; client expectations; communication; setting boundaries; training your clients	Client Intake Form.	What would you do if prospective client asks you to assist with....? (give different scenarios for class to reflect on)	Draft an intake form and client survey.
	Employee Relations	Understanding of how to determine when staff is needed; what type of staff is needed; how to handle new employees.	Discussion on hiring staff; contractors, part-time; virtual assistance; determining what you need; growth and expansion; tax requirements.	Information sheet from Small Business Administration website	When do you think it is appropriate to hire staff?	
Oct. 28	Session Seven					
	Marketing	How to develop a marketing strategy; how to market to attract the ideal client; engaging with the problem you solve; and theory of marketing.	Discussion on marketing choices: website; social media; print ads; business cards; and newsletters.	Marketing materials	What is your ideal client's problem recognition process and how do you engage it?	Create your marketing tool.
Nov. 4	Session Eight					

	Productivity Tools/Technology	Educate on available productivity tools, cloud systems, document management, document storage, paperless office, and data security.	Explore various programs and services available to assist lawyers with law office management.	Examples of applications.	How can technology help the small firm?	
			SUCCESSFUL SMALL FIRM PRACTICE COURSE - 2019 - Weekend Sessions			
Sept. 14	Session One	Objectives	Topics	Materials and Resources	Discussion Questions	Assignment
	Introduction to the Course & Small Firm Law	An understanding of small firm law and the resources of the DC Bar.	The small firm world, ethics, discipline and Bar resources.	Public opinion polls about the legal profession. Slides with snapshots of program pages.	How do you think lawyers are perceived by the public?	Review the Business Plan template.
	The Choice	Reflection on the choice to go small firm. Discerning the purpose of the venture; defining the ideal client; problem solving for the ideal client.	Discussion of characteristics of a small firm lawyer; cost benefit analysis; choosing a practice area and problems to solve.	Business Plan for the law office- defining the practice area.	How many of you are currently small firm practitioners? How many of you are considering going small firm because that has always been your dream? How many of you are considering going small firm as a result of the disappointing job market? What do you want to practice?	Review the business plan workbook.
	Lawyer as Entrepreneur/ The Business Plan	Understanding the entrepreneurial mindset for the small firm; identify strengths and weaknesses; reflect on what business task should be outsourced; explore thought provoking questions with the class. The Business Plan.	Discussion of Lawyer vs. Entrepreneur. Differences between the two; importance of business thinking; Planning is key.	Business Plan and the self evaluation process.	Our shared characteristics. Are you a lawyer or entrepreneur? Are you a people person? Are you able to empathize? Why is empathy important? Are you both strategic and detail oriented?	Prepare the small firm mission statement and other sections of the plan.
	Nuts and Bolts - Launching the Small Firm	An understanding of the essentials of starting a small firm.	Discussion on firm name; tax ID number; business entity; insurance; office options and the essentials of the launch.	Information from DCRA; virtual office and office-on-demand options; discussion of cloud based vs. server based set up	What do you think you need to get started? What are your biggest concerns about launching? Dealing with fear and other obstacles.	Organize your launch: how to set priorities.
	Ethics and Small Firm Management	An understanding of firm management; ethical implications of not establishing systems; how to create systems; tools for creating work flow and project management.	The necessity of systems and how to implement them, such as: file creation and management; case management; conflicts checks; office policies and procedures; time management and time-and-billing applications.	Legal Ethics Opinions and disciplinary actions relating to law firm management.	Why do small firm lawyers generate nearly half of the docketed bar complaints in DC?	Review of the bar complaint form.

	Banking	How to handle money in the small firm.	Discussion on banking; types of bank accounts; trust account management; and consequences of mismanagement; creating a reserve and dealing with cash flow issues.	DC Rules of Professional Conduct	What types of accounts do you need? Options for managing the accounts.	
	Fee Setting	An understanding of setting fees and timekeeping and billing.	Discussion of the value of problem solving; value of billable hour; P=R-E; hourly rates; charging for administrative work; time keeping and billing systems.	In Re Mance- flat fees; In Re Martin-contingency fees/reasonableness/disputed fees (ACAB); Laffey matrix	What is a reasonable fee to charge your clients? How do you determine that amount? What is your time worth? What is the value of a productive hour? Is there profit in your price?	
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	Marketing	How to develop a marketing strategy; how to market to attract the ideal client; engaging with the problem you solve; and theory of marketing.	Discussion on marketing choices: website; social media; print ads; business cards; and newsletters.	Marketing materials	What is your ideal client's problem recognition process and how do you engage it?	Design your marketing tool.
	Productivity Tools/Technology	Educate on available productivity tools, Cloud systems, document management, document storage, paperless office, and data security.	Explore various programs and services available to assist lawyers with law office management	Examples of applications.	How can technology help the small firm?	