Basic Training & Beyond
Day-Two

Client Relations

Marketing

Productivity & Technology

Who is your ideal client?

- Why good client choice is vital
- What are the characteristics of your ideal client?
- Where are they & how do you talk to them?

We are licensed to solve the problems of others for a fee

LAW IS A RELATIONSHIP BUSINESS

The business decision you make:

Taking anyone & everyone who walks in the door

or

Being selective and discerning

Client Vetting

- Advance fee (when is the *need* for your problem-solving ability at its peak?)
- The interview process & using a questionnaire
- Social media & public data bases
- Credit report: Experian's service for lawyers

When you need to close

- Are you talking to the decision maker?
- Can you solve this problem?
- Are there contingencies?
- Ask for the work. See page 80, e-Manual

Now that you have said “Yes”

- Start work in their presence
- Make sure they “see” you solving their problem
- Create a system of informing & educating that is personalized to each client

The challenging client

- Allow for sufficient time & attention
- Document the effort; (This becomes part of the client file: LEO 333)
- If you need to withdraw: Rule 1.16(b)

Real listening

How it works

Why it works

The problem we are solving
has an emotional component

Client expectations

What are they?

How do we address them?

A big factor in satisfied clients
who will refer new clients

Setting Boundaries

- It starts at intake & is reflected in the fee agreement
- Some client have to be trained & reminded
- Boundaries keep us professional
- The lawyer who takes no unscheduled calls

A small client can refer a big client

- Every client should feel like your most important client
- Informing & educating is essential
- Contact the client before the client contacts you

The New Client Checklist

- Am I competent & efficient?
- Is this an ideal client?
- Is this work in my Plan?
- Will the fee be reasonable now, during & at the end of the representation?
- Are expectations addressed?
- Can I finish the work?
- Will I need help?

Opportunities to make a good impression

- The appearance of the client file
- The office experience for the client
- The client’s interaction with you
- Meeting them quickly using Zoom

Clients to avoid

The liar

Exquisitely angry client

Serial litigant who is pro se or has fired counsel

The unrealistic person

The person who ignores boundaries & directions

The person who does not value your effort

The person with the *unsolvable* problem

You are on thin ice when . . .

- You are working outside your expertise
- You are too busy or afraid to communicate
- Your office is chaos and client data is exposed
- Your invoices are inaccurate
- You have big receivables & sue to collect fees
- You take on new work just to cover overhead
- You represent friends & family for free

Evaluate your client's experience

Request our *Client Satisfaction Survey Form*
From PMAS@dcbar.org

Use SurveyMonkey.com

More information on *Client Relations* is at
Page 77, e-Manual

How to avoid a problem using a survey

When staff have significant client contact, survey the client both during and at the conclusion of the representation.

Encourage feedback about how the client is being handled.

Make sure the survey results come to you.

Here’s what to ask

- What should we keep doing?
- What should we stop doing?
- What did we not do that we should do?

Marketing

Applicable Rules:

7.1

7.5

Codes, regulations & other jurisdictions can also apply.

Example:

Bergman v District of Columbia

DC Court of Appeals 08-CV-859

The first step . . .

Start from what is real & true.

I act
on the basis
of my
self-image.

Lawyers and imposter syndrome

Own who you are.

Own where you are.

Move from
“I have to market,”

To
“I get to market.”

Our choice . . .

-to talk about us

or

-to talk about the problem we solve

You cannot impact a feeling with a fact.

You can only impact a feeling with another feeling.

Experiences that involve little emotional intensity seem to do little to arouse focal attention, and have a higher likelihood of being registered as “unimportant” and therefore of not being easily recalled later on. Events experienced with a moderate to high degree of emotional intensity seem to get labeled as “important” (probably by anatomic structures in the limbic region and closely aligned areas, such as the amygdala and orbitofrontal cortex, which are discussed in more detail later in the book) and are more easily remembered in the future.

The Developing Mind, 3rd Edition

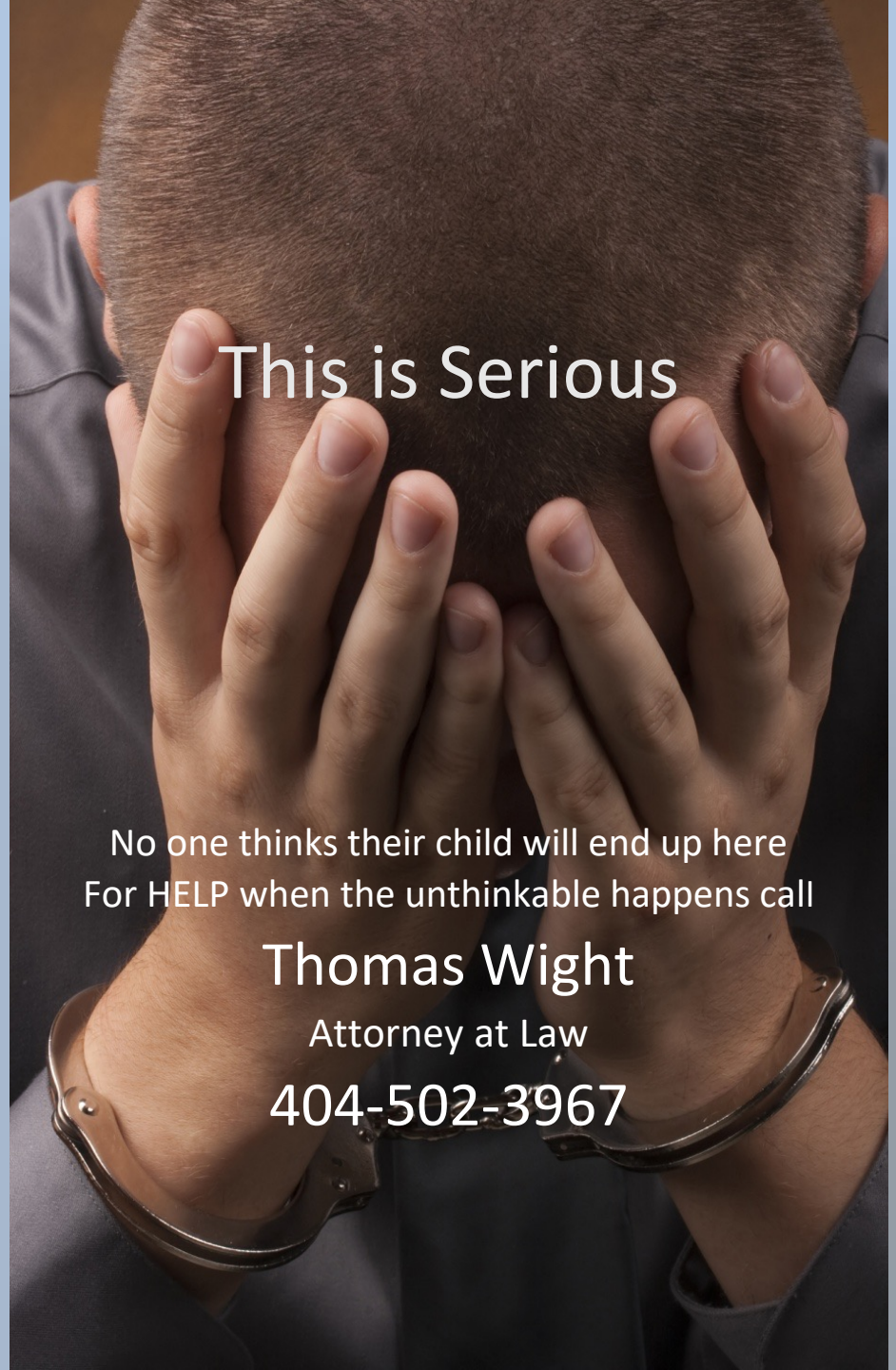
Dr. Daniel J. Siegel

Which message is more effective?

Juvenile Defense

Experienced former prosecutor
who now focuses on the problems
of juvenile defendants.

Thomas Wight, Esq.
Lawyer
136 Pryor Street SW
Atlanta, GA 30303
www.juveniledefense.xxx


This is Serious
No one thinks their child will end up here
For HELP when the unthinkable happens call
Thomas Wight
Attorney at Law
404-502-3967

Imagine your client's earliest thoughts about the problem . . .

If you had the chance to provide information at that moment . . . What would you say?

The problem the client lives with is

often deeper and wider

than the part you will solve.

& wider

- than the piece
- you will solve

How can you inform and educate

your ideal client

at each stage of their

problem recognition process?

The information you would provide

. . .

is content for marketing messages.

Inform . . .

Be careful not to give
legal advice when marketing.

The Miranda marketing example . . .

You have the right to remain silent.

vs.

Never talk to the police.

The ideal client's problem recognition process

- I think I've got a problem . . .
- Maybe it will go away . . .
- Can I solve it myself . . .
- Do I need a lawyer . . .
- Who is the right lawyer for me . . .

The old Yellow Pages ads are aimed at the last stage of the problem recognition process:

Who is the right lawyer for me?

Legal Zoom is aimed at the early stages.

What do process focused websites do?

Some examples of process focused sites:

DiPietro Law Group

VirginiaDivorceAttorney.com

Rosen.com

JerseyEstatePlanning.com

http://www.bobbattlelaw.com

http://www.oginski-law.com

http://www.paestateplanners.com

Marketing focused on
"me"

Tax, Business Law, Business Formation and Finance, Computer/High Tech/Biotech Law, Intellectual Property, Trusts, Estates, Wills, Probate, Estate Planning, Real Estate, Civil Litigation, Mediation.

Attorney and accountant, Notary Public. Former IRS attorney and former tax/business transactions attorney for a major corporation (Freddie Mac®). Education: University of Maryland (B.A., 1977); St. John's University School of Law (J.D., 1980); Georgetown University (M.S. Accounting, 1981); New York University School of Law (LL.M., 1987). Practice serves individuals, business, trusts, estates, partnerships, nonprofit organizations, etc. in regional, national, and international legal matters. Licensed to practice law in Maryland, District of Columbia, Virginia, and New York. Admitted to U.S. District Court-District of Maryland, U.S. District Court-Northern District of New York, U.S. Tax Court, U.S. Court of Appeals-Fourth Circuit, and U.S. Supreme Court Bar.

Computer law, high tech law, biotech law, software/product development agreements, consulting services agreements, software/product licensing agreements, software/product maintenance agreements, domestic and international software/product distribution agreements, e-commerce and web development agreements, joint ventures, teaming agreements, subcontracts, confidentiality agreements, litigation, etc.

Intellectual property (trademarks, service marks, and copyrights), applications, protection issues, infringement issues, domain name and web content protection, online brand protection issues and resolution strategies, domain name recovery and acquisition processes, unfair competition, trade secrets, trade dress claims, litigation, etc. Identifying and inventorying intellectual property assets, buying and selling intellectual property assets, etc.

Trusts, estates, wills, probate, estate planning and administration, general and special powers of attorney, health care power of attorney and advance medical directives/living wills, revocable living trusts, insurance trusts, charitable trusts, special needs

An example of “it’s all about me” lawyer marketing . . .



You are an estate planner or elder lawyer

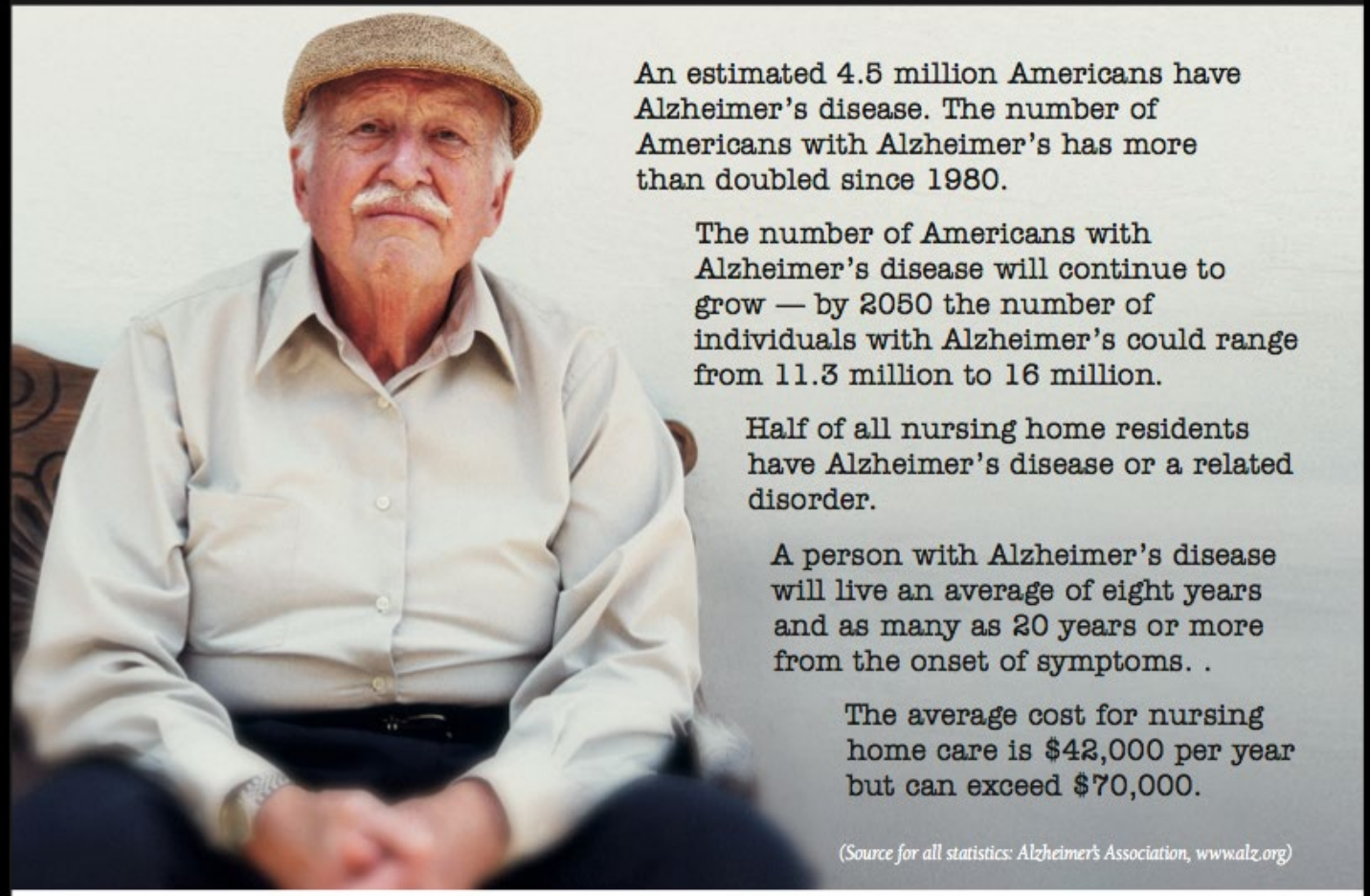
and you know your ideal client has a process.

How do you talk to them

while they are working their way through

their process?

"Dad Couldn't Remember How To Get Home."



An estimated 4.5 million Americans have Alzheimer's disease. The number of Americans with Alzheimer's has more than doubled since 1980.

The number of Americans with Alzheimer's disease will continue to grow — by 2050 the number of individuals with Alzheimer's could range from 11.3 million to 16 million.

Half of all nursing home residents have Alzheimer's disease or a related disorder.

A person with Alzheimer's disease will live an average of eight years and as many as 20 years or more from the onset of symptoms. .

The average cost for nursing home care is $42,000 per year but can exceed $70,000.

(Source for all statistics: Alzheimer's Association, wwwalz.org)

The answers to the legal and financial challenges posed by Alzheimer's disease can only be answered on an individual basis by an attorney whose practice is concentrated on elder law, Medicaid planning, and estate planning.

The Elder Law Firm of Marshall & Associates is known throughout Pennsylvania for the expert help they provide seniors who are faced with long-term care needs.

Take The First Step

Call today to reserve a place at one of our free seminars for seniors, their families, elder care professionals, and caregivers. Each presentation lasts about 90 minutes, including a *"Question & Answer"* session.

Elder Law Firm of
Marshall & Associates

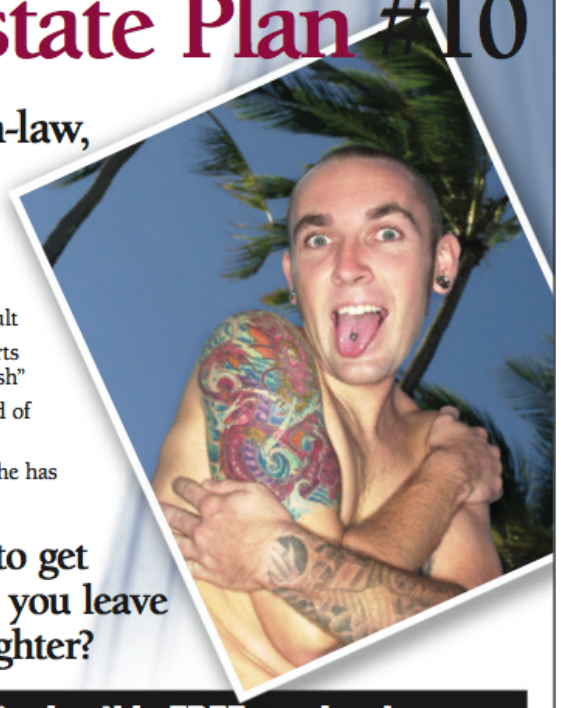
Jersey Shore Office
303 Allegheny Street, Jersey Shore, PA 17740-1405
(570) 398-7603 (800) 401-4552

Williamsport Office
49 E. Fourth Street, Suite 200, Williamsport, PA 17701-6355
(570) 321-9008

Wilkes-Barre Office
Cross Creek Pointe, Suite 402, 1065 Hwy. 315, Wilkes-Barre, PA 18702
(570) 822-6919

Reason To Make An Estate Plan #10

Your son-in-law, Fred



- Hasn't had a job since 1999
- Belongs to a religion that you consider a cult
- Sells t-shirts at concerts by a band called "Phish"
- You suspect he is fond of chemical substances
- Thinks it's great that he has rich in-laws

Is he going to get *half* of what you leave to your daughter?

Do not miss this FREE seminar!
Two days only. Seating is limited.

Wednesday, February 15, 2006
10:00am-11:30am
The Lodge at Rancho Mirage
68-900 Frank Sinatra Drive
Rancho Mirage

Thursday, February 16, 2006
6:30pm-8:00pm
The Lodge at Rancho Mirage
68-900 Frank Sinatra Drive
Rancho Mirage

Refreshments Served

Reserve your space today.
Call: 760-776-9977



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KIMBERLY T. LEE

74-916 HIGHWAY 111
INDIAN WELLS, CA 92210
PHONE 760-776-9977
FAX 760-406-5053
WWW.LEELAWYERS.COM

Who is Zamani & Associates talking to in this video?

Who is O’Neil Wysocki talking to here?



SmartMarketingNow.com

What are the questions

in your ideal client’s mind?

What is the intent reflected in this video?

BenGlassLaw

Elements of a good, long term marketing system . . .

Prepare information about
the five to ten questions
you get from every
new client.

Prepare a 15 to 30 minute talk to a
room full of your
potential ideal clients
informing & educating them
about the problems you solve.

Use this same content for:

An email marketing campaign
A blog post
A lead generator featured on your website
Your brochure
Social media

Create a database of contacts
in Outlook,
in a spreadsheet,
or in any other functional system.

Who goes into your
contacts list?

Friends, family, clients, former
clients, potential clients, &
anyone who can refer business.

Sophisticated contact management software review:

Contact Management Software Reviews

SalesForce.com

Clio Grow

A basic contact management system . . .

Contact ID	Contact Name	Contact Name2	Contact Title	Billing Address	City	State or Provi	Postal Code	Cour
1	Contact 1	Contact 1	Title 1	Address 1	City	New York	12345	Unite
2	Contact 2	Contact 2	Title 2	Address 2	New York	New York	12345	
3	Contact 3	Contact 3	Title 3		tle	Washington	12345	
4	Contact 3	Contact 4	Title 4		tle	Washington	12345	
5	Contact 4	Contact 5	Title 5		York	New York	12345	
6	Contact 5	Contact 6	Title 6		York	New York	12345	Unite
7	Contact 6	Contact 7	Title 7		tle	Washington	12345	Unite
8	Contact 7	Contact 8	Title 8	Address 8	Seattle	Washington	12345	Unite
9	Contact 8	Contact 9	Title 9	Address 9	New York	New York	12345	Unite
10	Contact 8	Contact 10	Title 10	Address 10	New York	New York	12345	Unite
11	Contact 8	Contact 11	Title 11	Address 11	New York	New York	12345	Unite
12	Contact 9	Contact 12	Title 12	Address 12	Seattle	Washington	12345	Unite
13	Contact 10	Contact 13	Title 13	Address 13	Seattle	Washington	12345	Unite
14	Contact 11	Contact 14	Title 14	Address 14	New York	New York	12345	Unite
15	Contact 12	Contact 15	Title 15	Address 15	London		12345	Unite
16	Contact 13	Contact 16	Title 16	Address 16	London		12345	Unite
17	Contact 14	Contact 17	Title 17	Address 17	London		12345	Unite
18	Contact 14	Contact 18	Title 18	Address 18	London		12345	Unite
19	Contact 14	Contact 19	Title 19	Address 19	London		12345	Unite
20	Contact 15	Contact 20	Title 20	Address 20	London		12345	Unite
21	Contact 16	Contact 21	Title 21	Address 21	Tokyo		12345	Japa
22	Contact 17	Contact 22	Title 22	Address 22	Tokyo		12345	Japa
23	Contact 18	Contact 23	Title 23	Address 23	Tokyo		12345	Japa
24	Contact 18	Contact 24	Title 24	Address 24	Tokyo		12345	Japa
25	Contact 19	Contact 25	Title 25	Address 25	Tokyo		12345	Japa
26	Contact 20	Contact 26	Title 26	Address 26	Tokyo		12345	Japa
27	Contact 21	Contact 27	Title 27	Address 27	Tokyo		12345	Japa
28	Contact 22	Contact 28	Title 28	Address 28	Tokyo		12345	Japa
29	Contact 23	Contact 29	Title 29	Address 29	Paris		12345	Fran
30	Contact 24	Contact 30	Title 30	Address 30	Paris		12345	Fran
31	Contact 24	Contact 31	Title 31	Address 31	Paris		12345	Fran
32	Contact 24	Contact 32	Title 32	Address 32	Paris		12345	Fran
33	Contact 25	Contact 33	Title 33	Address 33	Paris		12345	Fran
34	Contact 26	Contact 34	Title 34	Address 34	Paris		12345	Fran
35	Contact 26	Contact 35	Title 35	Address 35	Paris		12345	Fran
36	Contact 27	Contact 36	Title 36	Address 36	Paris		12345	Fran

If you need fewer rows than provided in the sample data, just select the rows you don't need and then, on the Tables tab of the Ribbon, click Delete and then click Table Rows. Or, right-click, point to Delete and then click Table Rows.

Click the arrow
heading cell in t
for sort and filt

How many opportunities exist for you to be found?

How many venues can you create for your marketing message?

You & your presence . . .

Your office

Business card

Website (video)

Newsletter

Blog

Brochure

Social media . . .

Sources for unique & traditional cards:

Moo.com

DesignYourOwnCard.com

Crane.com

VistaPrint.com

Speaking engagements . . .

Books & free publications . . .

Useful tools . . .

Create a great logo



99 Designs - Logo Design

What Every Virginia Woman Should Know About Divorce

7 Estate Planning Mistakes to Avoid

The concept - informing, educating & establishing yourself as the expert in your area - applies in any practice area . . .

Material for an essay, seminar, blog & newsletter are the tools.

Marketing starts with the right mindset

Relate to Marketing
like it is your best client . . .

How would you treat your
best client?

You would have a plan

You would strategize

You would open a file

You would work on it every day

You would evaluate it often

You can do the work yourself:

Rollins & Chan

Or you can use a service:

Great Legal Marketing

Mockingbird

UpwardAction.com

Focus on the problem you solve & the questions in the mind of the prospective client

Why the newsletter works

Targeted to your audience

Regularity

Long-term tool

Becomes a part of your process

More cost effective

Few do it well

Hardcopy is better than electronic

Marketing resources

The Culture Code by Clotaire Rapaille

Influence, the Psychology of Persuasion
by Robert B. Cialdini

Contagious, Why Things Catch On by Jonah Berger

You Can't Teach Hungry by John Morgan

Great Legal Marketing by Ben Glass

Primal branding: Create Zealots for Your Brand, Your Company, and Your Future by Patrick Hanlon

Website creators

- Mockingbird's free resource – Cockroach
- GNGF
- AttorneySync
- Rytechllc.com
- Foster Web Marketing

Marketing goals

- Not all marketing turns into instant sales
- There are long-term benefits to marketing (Top of mind)
- Build your credibility
- Reach expert status in your practice area
- Increase your lawyer referrals
- Key: you must have a strategy
- CONSISTENCY IS EVERYTHING

Productivity & the Small Firm

Profitability & growth are the result of
a productive lawyer

It’s a question of using the right tool for the job

It’s stepping back, watching & creating
workflows



ARE YOU LAWYERING OR LABORING?

2.5 hours

The average time an attorney spends on billable work per day.

2.9 hours

The average time spent each day on admin tasks.

1.2 hours

Of those 2.9 hours, the top 3 tasks are office administration (16%), invoicing (15%), and configuring technology (11%).

2 hours

33% of 6 hours/day not spent on billable work goes toward business development, indicating the importance of generating new clients.



ARE YOU LAWYERING OR LABORING?

23 minutes

How long it takes to recover from an interruption. Attorneys are interrupted ~6/day, so that's a ~2-hour loss per day.

2 out of 3 potential clients

Folks who say their "decision to hire" is most influenced by an attorney's responsiveness to their first call or email.

59 percent

People, on average, who didn't hire an attorney even after a consult.

86 percent

The average amount of attorneys' earnings that is *ever* collected.

Maddy Martin's full program on May 14, 2020 / Affordable Tools, Tech and Talent to Run a Small Law Firm Remotely

Recorded Lunch & Learn programs

Smith.ai

Where technology helps

- Research & finding information
- Managing data, such as time & billing, client information & firm financial information
- Communication

LEAD CONVERSION FLOW

smith

GENERATE

CAPTURE

Lead Sources (Generation)	Contact Methods	Response Methods	Qualification	Intake & Scheduling	Conversion
Referrals Reviews Local Listings PPC Social Media Content & Freebies (Advice, Forms, Calculators) Technical SEO Link Building	Phone Email Text Web Chat	Attorney In-house assistant or paralegal Receptionist service AI service	Good leads	Basic intake	

Instant

Transfer
Call-back
Appointment

Delayed

Follow-up call
Email drip

Full intake
New client agreement

→ New client!

Qualification	Future Clients & Good Will
Bad leads	Educate & Refer

Free additional resources

Smith.ai eBook:

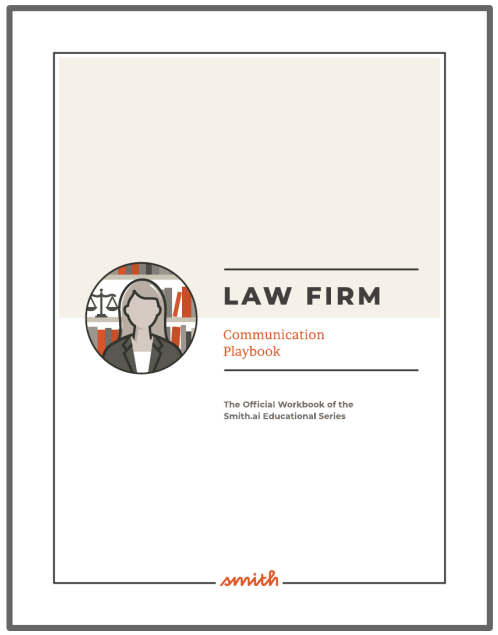
Are you Lawyering or Laboring?

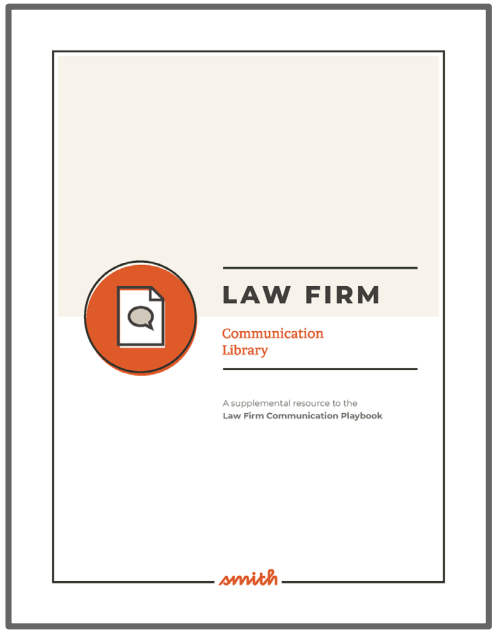


Free additional resources

Smith.ai Guides

Law Firm Communication Playbook





Law Firm Communication Library

Creating systems

https://www.theformtool.com/

Automates Word documents

It has a free version

& a pro version for $89 a year

Create a template for fee agreements

Free & low cost legal research

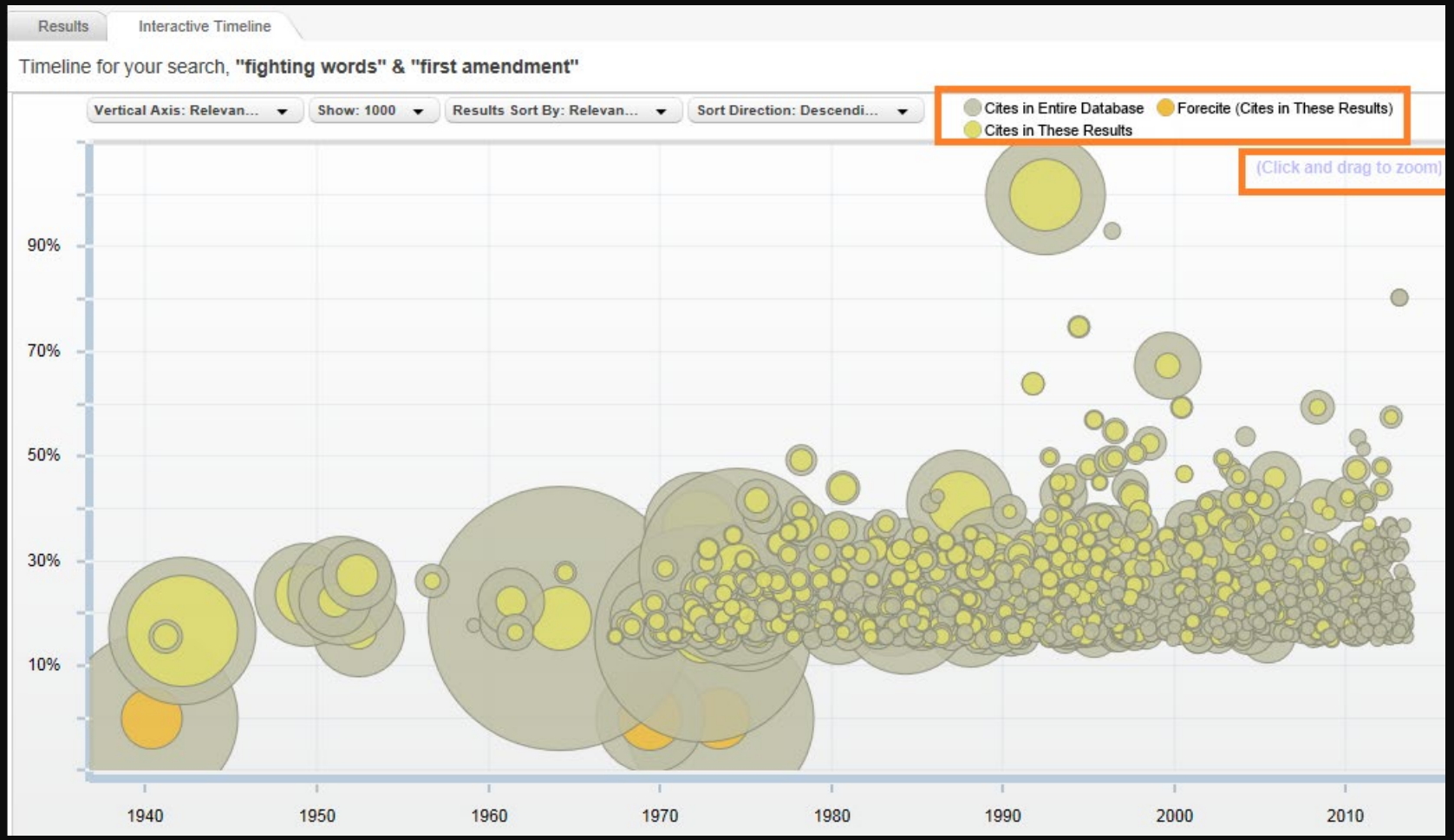
Fastcase, a DC Bar member benefit

Learn more about Fastcase

DC & Federal & all jurisdictions, plus more is free as a Bar member benefit

(Non-members pay $1000.00 annually)

The Fastcase interactive timeline – visualize search results



Important small firm systems

- Client intake & setup – your onboarding process
- Information processing; how paper and data are handled, entered & stored
- Tracking cash flow & financial information
- Conflicts checking – how it’s done in small firms

Time & Billing

- Time59.com $199 annually for entire firm
- Bill4Time.com $27 - $80 monthly per user
- TimeSolv.com $35 monthly per user
- Timeslips $860 annually / $925 perpetual

Prices as of 7/21/20 vendor website

Case Management Systems

- Clio is a DC Bar member benefit
- MyCase
- RocketMatter
- Cosmolex

Lawyerist review of case management tools

Technology Tools

- Online booking system - Calendly, Acuity, VCita
- Video Conferencing - Zoom, Google Hangouts
- VOIP phone system - Ring Central, Google Voice
- Case management - MyCase, CLIO, Smokeball, Rocket Matter
- Project Management/Team & Task Management - Asana, Trello, monday.com
- Web cam
- Lighting
- Microphone
- Scanner
- Online file storage - Dropbox, Google Drive, Box

Examples of new firm models

- Potomac Law Group
- Rollins & Chan
- MD Family Lawyer.com
- Nakia Gray

Concept Mapping

A strategic thinking tool

Plain paper and colored pencils/pens

Concept mapping, a/k/a mind mapping for lawyers

The five best applications

Lunch & Learn Programs are here.

Successful Small Firm Practice Course

Noon-2 p.m. Monday Sessions:
Sept. 14, 21, 28; Oct. 5, 19, 26; Nov. 2, 9

Saturday Sessions:
Oct. 3 and Nov. 7, 8:30-4:30

Register: SmallFirmCourse@dcbar.org

Some long-term goals

- Build your database
  - Sign up for a CRM and begin building your list
  - Create a resource and have people opt in Choose
- a niche practice area and become THE expert
  - Show up with information to educate (but don't give it all away)
  - Blog
  - Live Stream
- Establish yourself as an expert
  - Guest posts/appearances
  - Bar Association articles and CLEs
  - Media pitches
  - Host your own info sessions
  - Host a challenge
- Launch a new product, service, event online—SELL something



Download this free guide:
http://beyondthebarinstitute.com/attract-clients-online

Join Nakia's free Facebook group for lawyers
www.graylegalpc.com

Generate Money Now

- Offer virtual consults (paid and unpaid)
- Create an information product and sell it (helpful resources are needed)
- Host online events (paid and unpaid)
- Collaborate with other professionals who serve your same audience
- Offer a special (Wills, Expungements, Strategy Sessions)

We all want to be happy & profitable

You can do it on your own.

Some lawyers have done it with help:

How to Manage a Small Law Firm
Atticus
Affinity Consulting
PMAS