BASIC TRAINING & BEYOND
DAY TWO

<u>**We will begin at 9:15 a.m.**</u>

- Getting Clients
- Marketing & Branding
- Client Relations
- Productivity and Technology

Where do I start?

Once you have completed the requirements of creating a law firm, **you need to sell something.**

Marketing

DC Rules of Professional Conduct

7.1 and 7.5

Rule 7.1

(a) A lawyer shall not make a **false or misleading communication** about the lawyer or the lawyer's services. A communication is false or misleading if it:

(1) Contains a **material misrepresentation** of fact or law, or **omits a fact** necessary to make the statement considered as a whole not materially misleading; or

(2) **Contains an assertion** about the lawyer or the lawyer's services **that cannot be substantiated**.

Rule 7.1 Comment (1)

[1] …It is especially important that statements about a lawyer or the lawyer's services be **accurate**, since many **members of the public lack detailed knowledge of legal matters**. Certain advertisements such as those that describe the **amount of a damage award**, the **lawyer's record in obtaining favorable verdicts**, or those containing **client endorsements**, unless suitably qualified, have a **capacity to mislead** by creating an **unjustified expectation that similar results can be obtained for others**. Advertisements **comparing the lawyer's services with those of other lawyers** <u>are false or misleading</u> if the claims made **cannot be substantiated**.

Rule 7.1 Comment (7) - Referrals

[7] A lawyer **may agree to refer clients to another lawyer or a nonlawyer professional**, in return for the undertaking of that person to refer clients or customers to the lawyer. Such reciprocal referral arrangements **must not interfere with the lawyer's professional judgment** as to making referrals or as to providing substantive legal services… a lawyer who receives referrals…**must not pay money** or give **anything of material value** solely for the referral, but the lawyer does not violate paragraph (c) of this Rule by agreeing to refer clients to the other lawyer or nonlawyer professional, so long as the reciprocal referral agreement is **not exclusive** and the **client is informed** of the referral agreement.

The Soft Launch

“Start before you're ready.”

“Don’t think. Act. We can always revise and revisit once we’ve acted. But we can accomplish nothing until we act.”

“Once we commit to action, the worst thing we can do is to stop.”

— Steven Pressfield, Do the Work

Don’t be afraid of the **soft launch.**

A **soft launch** is when you make your services known or available to a **select group of people**.

Pick one specific service
and find someone to pay you for it.

It doesn’t matter if it’s a simple will, uncontested divorce, or a complicated real estate transaction.

Sell something *<u>first</u>*.

Ideas for a soft launch:

- Send personalized emails to a select group of contacts about your service
- Create a video message about your launch
- Print postcards about a specific service

Sell yourself and the problems you solve first, then work on the rest.

If you can't sell it, you don’t have a business.

What’s your marketing budget?

“If you only have $500, take someone who refers you cases out to dinner.”

30% of lawyers don’t have a marketing budget

0% of solos said they were sitting down and budgeting on marketing

29% of 2-9 lawyer firms have a marketing budget

39% of solos do not have a website.

12% of respondents in firms of 2-9 lawyers do not have a website.

KNOW WHAT YOU’RE SELLING

WHO – Who are your legal services for? Who is the ideal client who will benefit most from what you have to offer?

WHAT – What legal services are you selling? The more specific you can get about what you’re offering, the better.

WHEN – Is there a time frame for your legal services? How long will it take to deliver what you’re offering?

WHERE – Where do people engage you? On your website, over Zoom, in person? Where can they find out more information?

HOW – How do you work? What is your intake process and how do you bill for your services? How will you solve their problem?

If you don’t enjoy the selling, if you can’t do it, or find you can only do it by slashing your prices, you should reconsider your plan.

Prioritizing sales will force you to figure out whether opening your own office really makes sense for you.

How do you get your first, second, third, and twenty-third clients?

Have a plan and follow it.

Getting clients is hard when you resist, procrastinate, avoid, or decide you have a magic alternative that enables you to sell legal services without selling.

Create a contact list:

- Spreadsheet
- Mailchimp contact management
- Clio Grow
- Contact management software

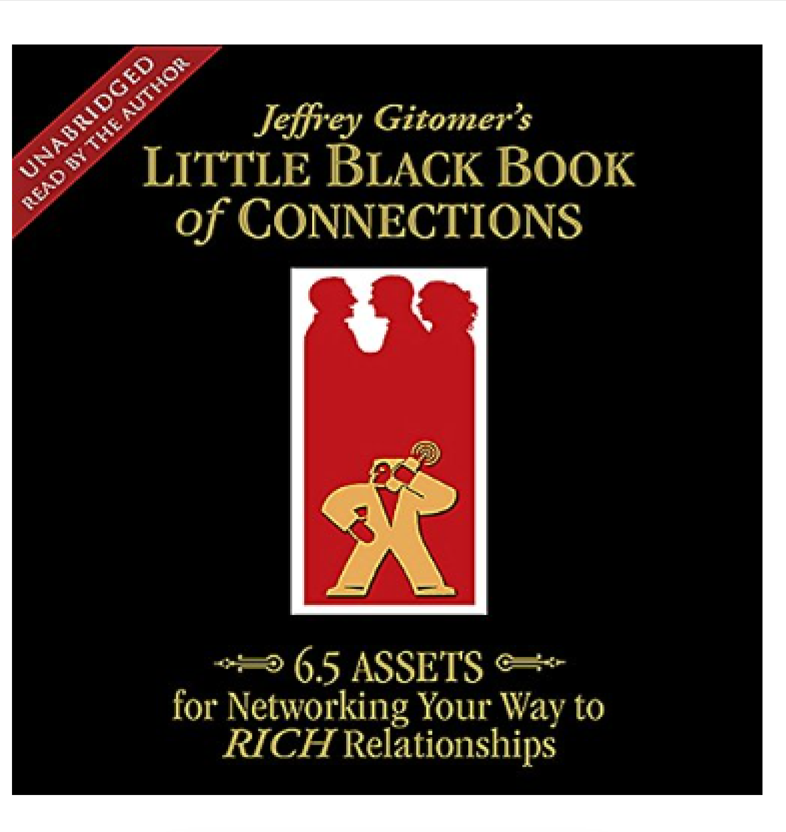
81% of legal consumers seek referrals before retaining an attorney or firm

Contact everyone you know to let them know what you are doing.

This can be one (or ideally more) of the following:

- Printed announcement
- Emails
- Lunches with your network
- Law firm launch event
- Social media post

Need help networking?



[The Little Black Book of Connections: 6.5 Assets for Networking Your Way to Rich Relationships]

When you contact individuals on your list, do the following:

- Explain your passion for helping people with legal problems
- Describe the specific problem(s) you solve
- Ask your contacts if they know anyone who needs your services.
- Ask contacts to let their network know that you’re available and ready to work.

Meet and Reconnect with Contacts

- **Meet other small firm attorneys** – both in your practice area and other practice areas
- **Meet with other professionals** who could make referrals to you (financial advisors, mental health professionals, realtors, etc.)
- **Meet in person** if possible – coffee, lunch, etc.
- **Ask questions** – get to know them, ask to hear their story, ask for advice, let them know what kind of work you are looking to do

Without a consistent referral network, you'll likely end up:

- **Taking cases you don't want** to cover your overhead
- **Chasing or writing off fees** from clients who are unable or unwilling to pay
- Spending time on consults where you're **always selling yourself**
- Unable to grow because **you don't have consistent case volume**, or **don't make enough profit** on the cases you have

When seeking referrals…

- You need to be clear what business you ***actually want***

- Who is your **ideal client**?

Ideal clients

- Have a problem you are competent to solve
- Are people you enjoy working with
- Can afford to pay your fee

Who is your **ideal client**?

Ideal client "Persona"

Talk to former and prospective clients to find out:

- **Background**
- **Demographic information –** gender, age, income, location
- **Psychographics** – ambitions, values, opinions/beliefs
- **Behavior** – who do they ask for recommendations, what do they respond to, how they learn about you
- **<u>Challenges/pain points</u>**
- **<u>How do you help</u>?**

When you determine

1) Who your ideal client is
2) What problem they have
3) How they discover they have this problem
4) What actions they take when they discover they have this problem

You can gear your marketing efforts towards reaching them ***early*** in their **problem recognition process.**

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?

An effective marketing plan will **reach ideal clients early in their problem recognition process**.

Developing content that **informs and educates** clients about their problem helps reach clients early in the process.

<u>**Attract clients you want, repel those you don’t**</u>

Create a Lead Generator. (worksheet)

Topic ideas: FAQs in your practice

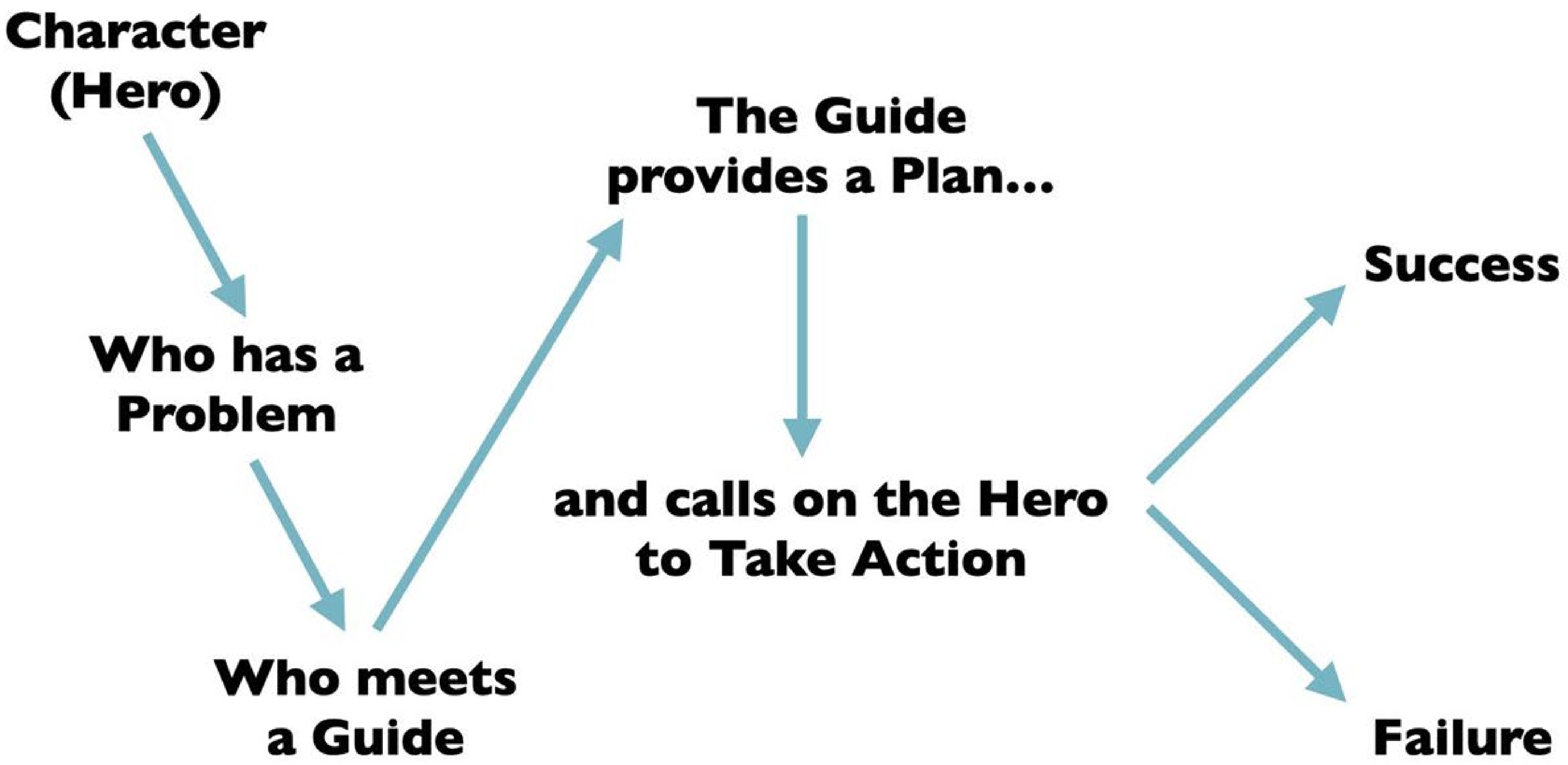
- *FAQs: "What to wear to family court?"*
- *Guide: "Considerations for parents when estate planning"*
- *Checklists*

Attract clients you want, repel those you don't


Remember that you are a farmer,
Not a hunter.

Content development can be:

- Website
- Blog
- Social media posts
- Newsletter
- Article
- Brochure
- Printed/Ebook
- PDF Guide/resource


Character (Hero)
Who has a Problem
Who meets a Guide
The Guide provides a Plan...
and calls on the Hero to Take Action
Success
Failure

In effective marketing,

The client is the hero.

The attorney is the guide.

[Watch this presentation on effective messaging](#)
[Worksheets to help perfect your pitch](#)

Creating a marketing plan:

- **Gather your assets** – where will you share information about your firm and services? (newsletter, social media, virtual and in-person communities you belong to)

- **Implement the plan** – Determine frequency, write the copy, design materials, figure out how and when to publish, set deadlines

- **Refine and replicate this plan** – use feedback and data to refine and replicate your marketing in the future, and stay engaged with your contacts and former clients

Branding for Lawyers

“Building your brand doesn’t take millions. It takes imagination.”

— Harry Beckwith, Selling the Invisible: A Field Guide to Modern Marketing

Get clear on <u>what you want to be known for</u>.

Share your vision of
who you want to serve and
what problems you want to solve.

Branding + Positioning

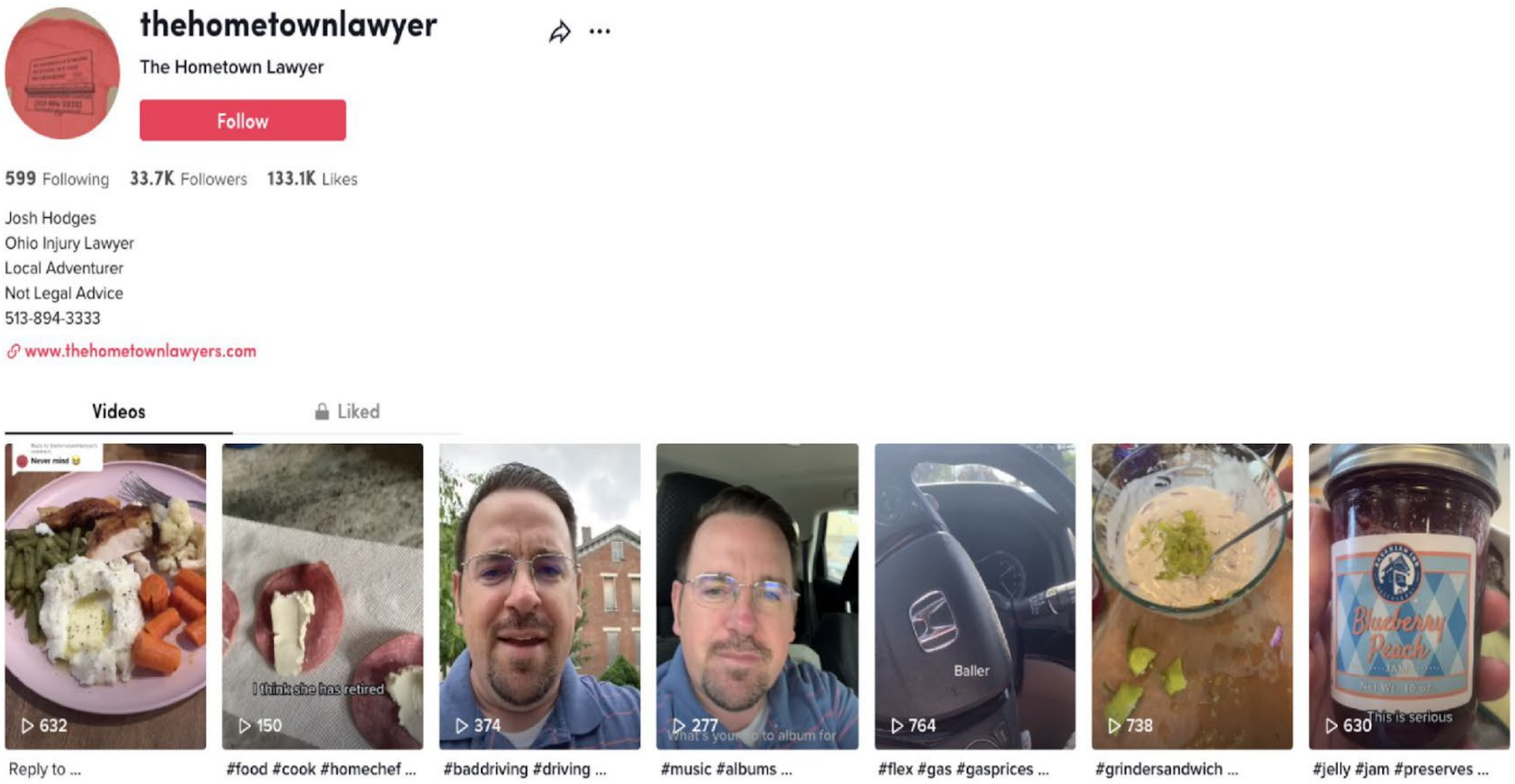
Examples + Inspiration

Contra

Ruky

Branding + Positioning

Examples + Inspiration



Local

Kruger & Hodges

What's your business vision for your firm?

- Do you want to work with a certain kind of client? **Who?**
- Do you want to work in one very specialized area of the law? **What?**
- Do you want to pair your legal problem-solving skills with some other service or skills that you possess? **How?**
- Do you want to connect your firm and legal work with a higher purpose? **Why?** To what end?

When you clarify your vision for your firm, it will come through in:

- Emails with current and prospective clients
- Blog posts and mini-posts on social media
- Your daily schedule and routines
- The "About Me" page on your website
- Your "About Me" conversations with friends, family, and business contacts

Developing Your Personal Narrative

What is your mission as a lawyer?

What makes me or the services I provide as a lawyer unique?

What are my emotional or practical strengths? What knowledge do I have that can help prospective clients?

How does my background affect my perspective? What does it mean about the way I view the world that others can relate to?

What are those core tenets that I believe about the law? About life? How should that show up for my clients?

Personal Narrative Tips

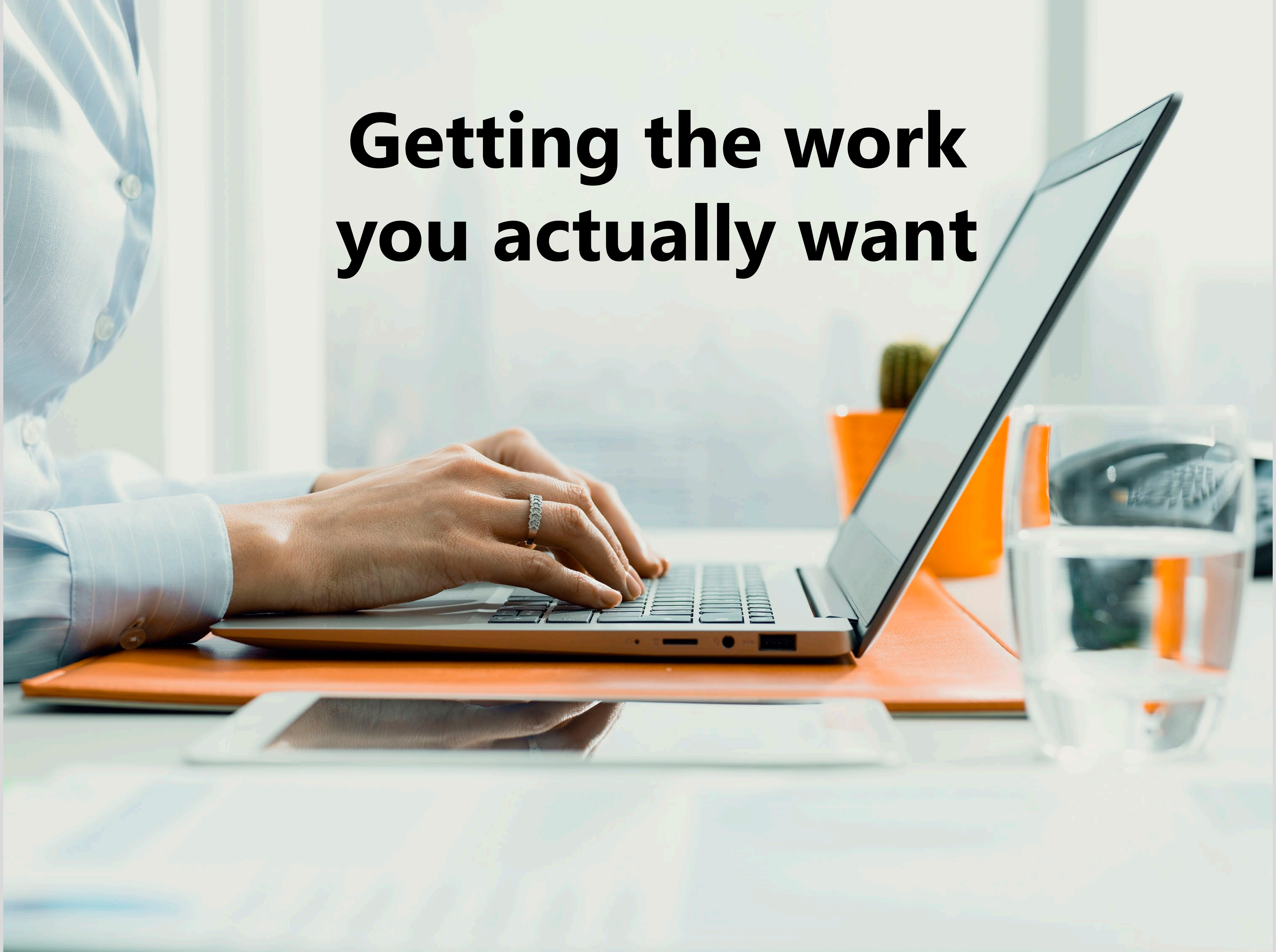
- **Be authentic to who you are as a lawyer and person** – know your motivation and stay true to that
- **Be consistent in your messaging** – use your personal narrative in everything you write

LinkedIn for Lawyers

- Profile – photo, name pronunciation feature, click on picture to do video introduction
- Header image – put the "ring the bell" picture in there for the follow
- Featured section – video content, imagery testimonials from google reviews
- Webinars, podcasts - put in featured post
- About section – who do you help, how do you help, what makes you uniquely qualified to help them
- It's a lot harder to gain business traction if you don't connect with people
- Skills – finding relevant skills – search different varieties and pick relevant skills
- Recommendations – give them out
- Add your publications

Google Business Profile

- Free
- #1 place people look for reviews
- Need to have ways for happy clients sing your praises
- Need to motivate happy reviews to offset unhappy reviews


Getting the work
you actually want

Narrowing your focus

- If you could only solve one legal problem, what would it be?

- If you could stop doing one type of work in your practice, what would it be?

If you want to do a specific type of work, don’t brand yourself as a lawyer who does it all.

Frame your focus the way you want to be hired

Working towards your specialty:

- Figure out **what cases/legal work you really like**
- Take time to **become an expert** in that area
- Do **pro-bono or low-bono work** until you can attract more paying clients in your specialty
- **Create content** related to your specialty and post it on your website, social media, newsletter, etc.
- **Set deadlines and goals**

Have a process (and stick to it)

How do you work?

- Let clients know your process, (website, marketing, fee agreement)
- Steps to solve problem? (Meetings, questionnaire, research, drafting, review, final steps, closing the matter, etc.)
- Show the steps
- What part of the process does the client play?
- Do you stick to the process?

Marketing yourself as a guide

- Guides **explain**, they don't sell.
- **The sales process is just a conversation** to help the client understand your process and connect with you and what you do
- Predict and notice **patterns**
- Streamline the steps and communication
- Teaching and sharing knowledge

Nobody Wants What You’re Selling

Lee Rosen

People don’t want legal services. They don’t want intellectual property advice, disability assistance, contract drafting, employment law, an estate plan, a divorce, or whatever legal service it is that you provide.

People want the *feelings* the legal services give them.

They want relief, freedom, or success. Clients want to feel powerful, in control, happy, satisfied, contented. They want to walk with their head held high, their chest puffed out, and confidence in their step. Each of us wants our own particular feeling, but it’s still mostly a *feeling* that we really want.

Why, then, do we lawyers stuff our websites, our sales pitches, and our conversations with words about the legal services we provide, instead of the feelings the clients want to buy?

For the full article, click here

Branding Basics for Lawyers

Check in with your firm’s brand:

- What is working for me?
- Is my branding consistent?
- Can I systematize this?
- Can I delegate this?
- Are there disconnects or inconsistencies?

Brand Platform – Name and Visual

- Firm name .
- Logo
- Colors
- Fonts

Create a great logo

[99 Designs - Logo Design]

Brand Platform – Language

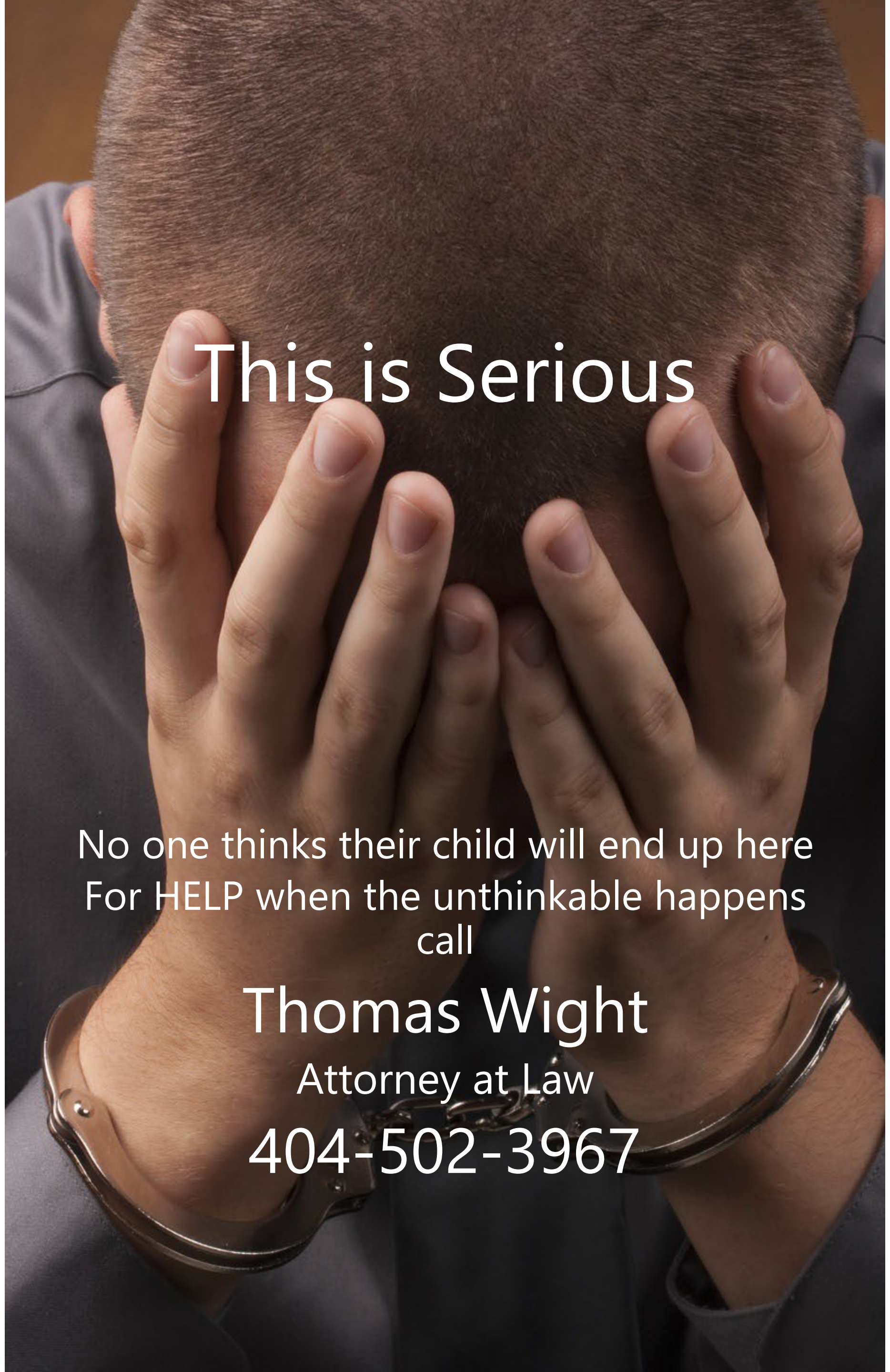
- **Tagline** – What problems do you solve?
- **Positioning Statement** - How your service fills the particular need of your market
- **Brand Story**
- **How to Hire Me language** – Next steps

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

Website

- Homepage
- About Page
- Services Page
- Contact Page
- Wordpress vs. Squarespace/Wix (own your content)

SEO Tips

- Blog on your site
- 1,000+ word articles
- Google Keywords and “People also ask/search”
- Outgoing links to sources (.org and .gov)
- Building: Expertise, Authority, Trustworthy
- Links back to your site (podcast, website, etc.)

Digital Branding and Marketing

- Ebooks
- Email signature
- Blog content
- Newsletter template
- Videos/Webinars

Inform . . .

Be careful not to give
legal advice when marketing.

The Miranda marketing example . . .

You have the right to remain silent.

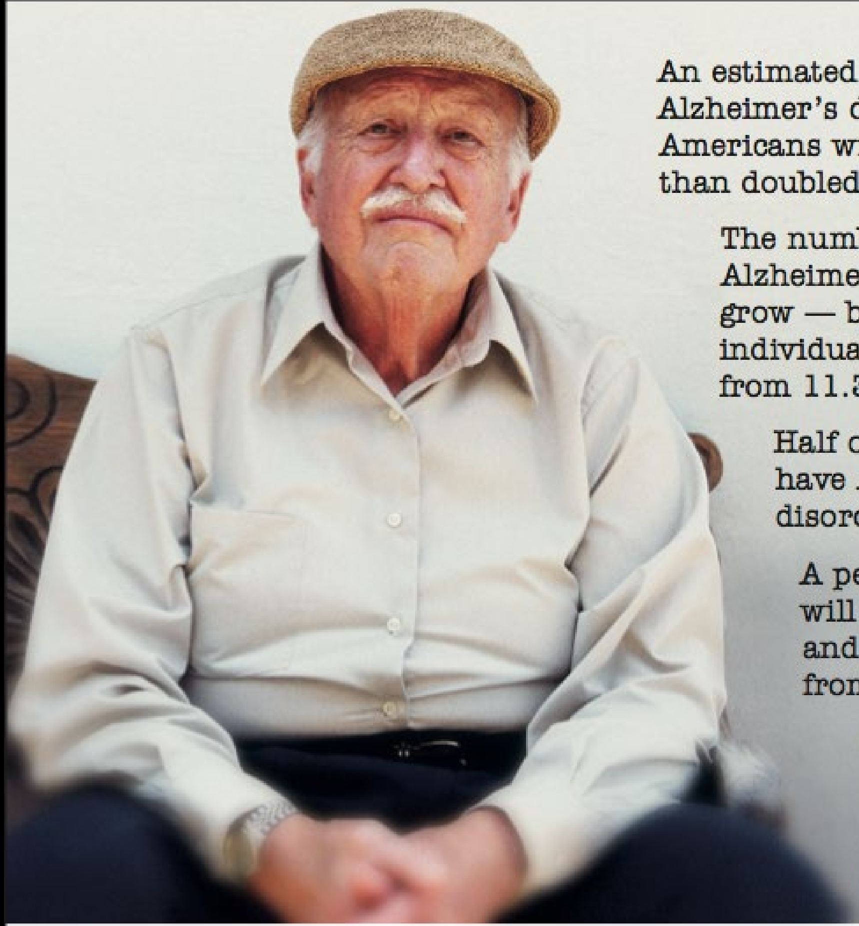
vs.

Never talk to the police.

Print Marketing

- **Business cards - Moo**
- **Letterhead & envelopes**
- **Postcards**
- **Folders**
- **Brochures**

"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, www.alz.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.

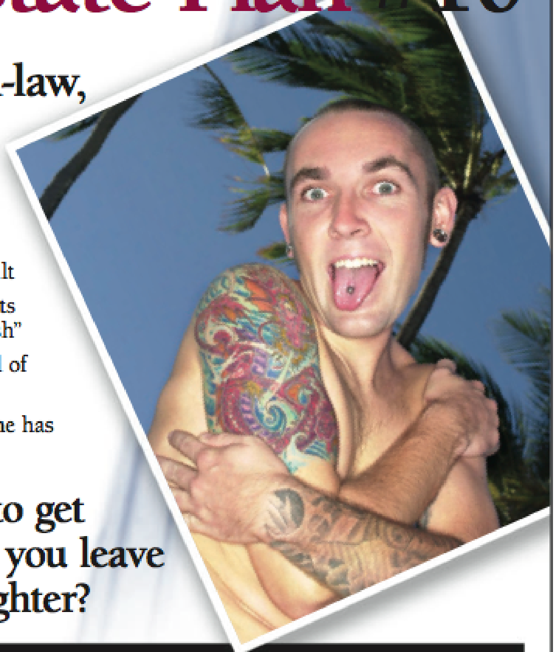
Elder Law Firm of
Marshall & Associates

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	Thursday, February 16, 2006
10:00am-11:30am	**6:30pm-8:00pm**
The Lodge at Rancho Mirage	The Lodge at Rancho Mirage
68-900 Frank Sinatra Drive	68-900 Frank Sinatra Drive
Rancho Mirage	Rancho Mirage

Refreshments Served

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

LAW OFFICES OF
KIMBERLY T. LEE

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

The newsletter as a tool

- Goes out to your contact list
- Reminds your network of the work you do
- Top of mind – when to send?
- Provides information about your practice area or related topics
- Shares your point of view
- Informs and/or entertains

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
- Try hardcopy instead of electronic

[EXT][New post] By Search Warrant or Subpoena, the Government Will Get Your Gmail (and the Numbers Are on the Ris

GJ

GRAND JURY TARGET <comment-reply@wordpress.com>
To Daniel Mills

If there are problems with how this message is displayed, click here to view it in a web browser.

New post on **GRAND JURY TARGET**

By Search Warrant or Subpoena, the Government Will Get Your Gmail (and the Numbers Are on the Rise)

by Kropf Moseley

By: Sara Kropf

I have a Gmail account for personal use. You likely do too. And nearly every one of my clients has one. In fact, Google owns about 43% of the email market. Gmail has about 1.8 billion users and about 306 billion emails are sent and received daily in 2020.

Who cares about Gmail this much? The federal government does.

That's because people still send a lot of interesting things via email. The government wants to use those emails to build their criminal cases, particularly in white-collar cases. We think about wiretaps as electronic surveillance since they happen in real time, but gathering email is a key part of how the government investigates potential crimes.

GrandJuryTarget.com

What to do with marketing content

- Put it on law firm blog
- Send it out as an email newsletter
- Post it on social media
- Create a guide or resource on your website

[EXT][New post] Forfeiture-by-wrongdoing

Koehler Law <donotreply@wordpress.com>
To Daniel Mills

Reply | R

If there are problems with how this message is displayed, click here to view it in a web browser.

New post on **Koehler Law**

Forfeiture-by-wrongdoing

by Jamison Koehler

Under the 'forfeiture-by-wrongdoing doctrine, a defendant forfeits his Sixth Amendment right to be confronted by a witness against him, as well as his objection to the introduction of hearsay, if he wrongfully procured the unavailability of that witness with the purpose of preventing the witness from testifying.

Read more of this post

Jamison Koehler | December 13, 2021 at 1:11 pm | Categories: Evidence, Legal Concepts/Principles, Opinions/Cases | URL: https://koehlerlaw.net/?p=16381

Comment   See all comments

Jamison Koehler • 1st
Koehler Law
54m •

Under the 'forfeiture-by-wrongdoing doctrine, a defendant forfeits his Sixth Amendment right to be confronted by a witness against him, as well as his objection to the introduction of hearsay, if he wrongfully procured the unavailability of that witness with the purpose of preventing the witness from testifying.

The "forfeiture-by-wrongdoing" doctrine in Hairston

koehlerlaw.net • 2 min read

Like Comment Share Send

Add a comment...

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

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)

Client Relations

How are clients handled at the firm?

- Who answers the phone? What do they say?
- Who returns new client calls?
- Who answers client emails?
- How are clients greeted at the office?
- Do appointments run on time? Are deadlines met?

LEAD CONVERSION FLOW

smith

GENERATE

Lead Sources (Generation)

- Referrals
- Reviews
- Local Listings
- PPC
- Social Media
- Content & Freebies (Advice, Forms, Calculators)
- Technical SEO
- Link Building

CAPTURE

Contact Methods

- Phone
- Email
- Text
- Web Chat

Response Methods

- Attorney
- In-house assistant or paralegal
- Receptionist service
- AI service

Qualification

Good leads

Intake & Scheduling

Basic intake

Instant:
- Transfer
- Call-back
- Appointment

Delayed:
- Follow-up call
- Email drip

Full intake

New client agreement

Conversion

New client!

Qualification

Bad leads

Future Clients & Good Will

Educate & Refer

[Smith.ai](https://smith.ai)

Client contact protocol

- Training staff and services that interact with clients
- Courtesy
- Knowledge of law firm policies
- Maintaining professionalism
- Communicating expectations – both of the client and of the attorney

Vetting a potential client:

- **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 you want to do

After You Say "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
- Create a **client experience** in your firm

Options for Client Questionnaire – store client information securely in a cloud system

- Google Forms
- Microsoft Forms

When to use a client questionnaire:

- **Before a consultation** - conflicts checks, to determine whether the work fits in your plan
- **During representation**
  - Gather necessary information
  - Get feedback on client satisfaction
- **After representation** – feedback, testimonials

Feedback from current and former clients:

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

Happy Client?

Do they want to leave a 5-star Google review?

Setting and Maintaining Boundaries

- Start at intake and reflect expectations in fee agreement
- Clients may need to be educated and reminded of your firm’s boundaries
- Boundaries keep you professional
- Unscheduled calls and meetings

More on Boundaries

LAP at DC Bar
Building Fences Not Walls Discussion
Passcode: MN#DMa35

Books: Nedra Tawwab, Set Boundaries, Find Peace: A Guide to Reclaiming Yourself (also a Workbook)

Podcasts:

- Ten Percent Happier #394. Staying Sane at Work | Laurie Santos
- Ten Percent Happier #406. That Rut You're In – This One Word Could Pull You Out | Nedra Tawwab
- The Happiness Lab When Guilt Is Good… and When It's Not

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
- If you can’t help the prospective client, get them to the lawyer who can help them

Communicate clearly, and often

- Be proactive – anticipate questions and answer them before they are asked (FAQ/client resource)
- After calls or meetings, summarize what was discussed and provide supplemental information for next steps
- Set clear expectations – best way to reach you

New Client Checklist:

- Am I competent & efficient?
- Is this an ideal client?
- Is this work in my business 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?

Clients to avoid:

- The liar
- Exquisitely angry client
- Serial litigant who is pro se or has fired counsel
- The person who keeps interrupting you
- The unrealistic person
- The person who ignores boundaries & directions
- The person who does not value your effort
- The person with the unsolvable problem

The challenging client

- Set expectations and boundaries
- Allow sufficient time and attention
- Document the effort you make and include it in the client file (phone calls, emails, texts, etc.)
- Include all documentation in the client file - LEO 333
- If you need to withdraw: Rule 1.16(b)

Productivity & Technology

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

AI and its role in a small firm

- ChatGPT – test it out to assess its value and limitations
- AI can be good for – brainstorming, improving first drafts, repurposing an article or other writing for social media
- AI does "hallucinate," so always double check citations and sources

Video Tools

- Descript – free video editing, add transcription or captions
- Videosocials – present to a group on Zoom and get your video recorded and posted for your use
- Videos can be useful for: FAQs, process explanations, topics of interest to your clients and network
- AI video generation from text with Synthesia

Work on your firm, not just in your firm . . .

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.

smith

Technology Tools

- Case management – MyCase, Clio (member benefits)
- Project Management – Asana, Trello
- Accounting – integrated, Xero, Wave
- Online File Storage – Google Drive, Dropbox, Box
- Phone system – Google Voice, Ring Central, Ruby Receptionists
- Scheduling - Calendly
- Scanner
- Webcam
- Microphone

Planning out your day

- What tasks do you need to accomplish?
- When are you most productive?
- When are you least productive?
- What environment do you work best in for accomplishing different tasks?
- Do you have staff? When are they working?

Tools for tracking how you spend your time:

- [RescueTime]
- RescueTime collects data about how you spend your time on your devices, it categorizes the time and labels it as productive or distracting on a five-step scale

Ways to make the most of your time:

- **Blocking time** – example: first 10 minutes of each hour to answer emails
- **Batch tasks** – doing similar tasks on Friday
- Knowing which hours are most productive
- Identifying tasks that can be done even when you get interrupted

Being more productive:

- Teach yourself not to interrupt yourself
- Pomodoro technique – 25 minute chunks
- Keep a list – 3-5 items each day that are non-negotiable
- Schedule in a buffer to meeting times so you aren't rushing or showing up late

Reducing interruptions:

- Find a new location to work
- Manage expectations (unscheduled calls)
- Delegate or postpone

Scheduling

- Who manages your schedule?
- How do clients schedule a call or meeting with you?
- Do you take meetings every day of the week?
- How often do you have to reschedule meetings? What is your process for doing this?

Automating Scheduling

- Software like Calendly, Bookings or Acuity
- Integrates automatically with your calendar
- Add it to your footer and website
- Give the link to your assistant or answering service
- Only let people schedule times when you want to take calls/meetings

Why automated scheduling works

- Less back and forth in emails
- Less staff needed
- Clients feel like you’re available to them
- You can get into a routine
- Blocks out time for different kinds of work
- Batch your calls/meetings so you have less interruptions when you’re working

Case Management Software

- Clio, CosmoLex, MyCase
- Case management, document management, billing, payments, trust accounting, calendaring
- Practice management tools in one program
- Use free trials to test out interface

Case Management Software

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

Lawyerist review of case management tools

Standard Operating Procedures

- Tasks you do repeatedly
- Tasks you delegate
- Tasks that are complex

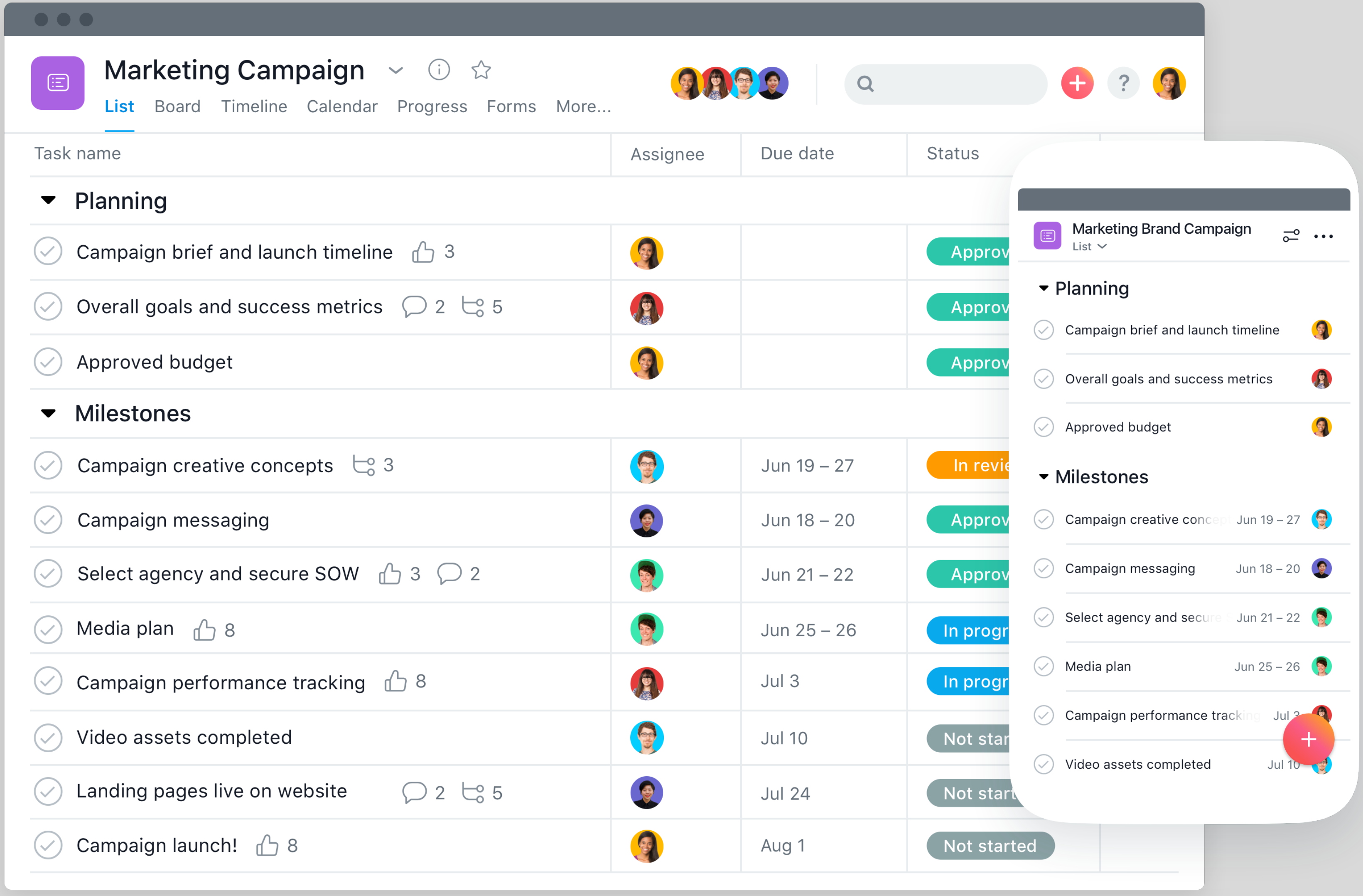
Why SOPs can help your firm

- Save time
- Easier delegation
- Less mistakes

- Apps can help – Trello
- Delegation resource

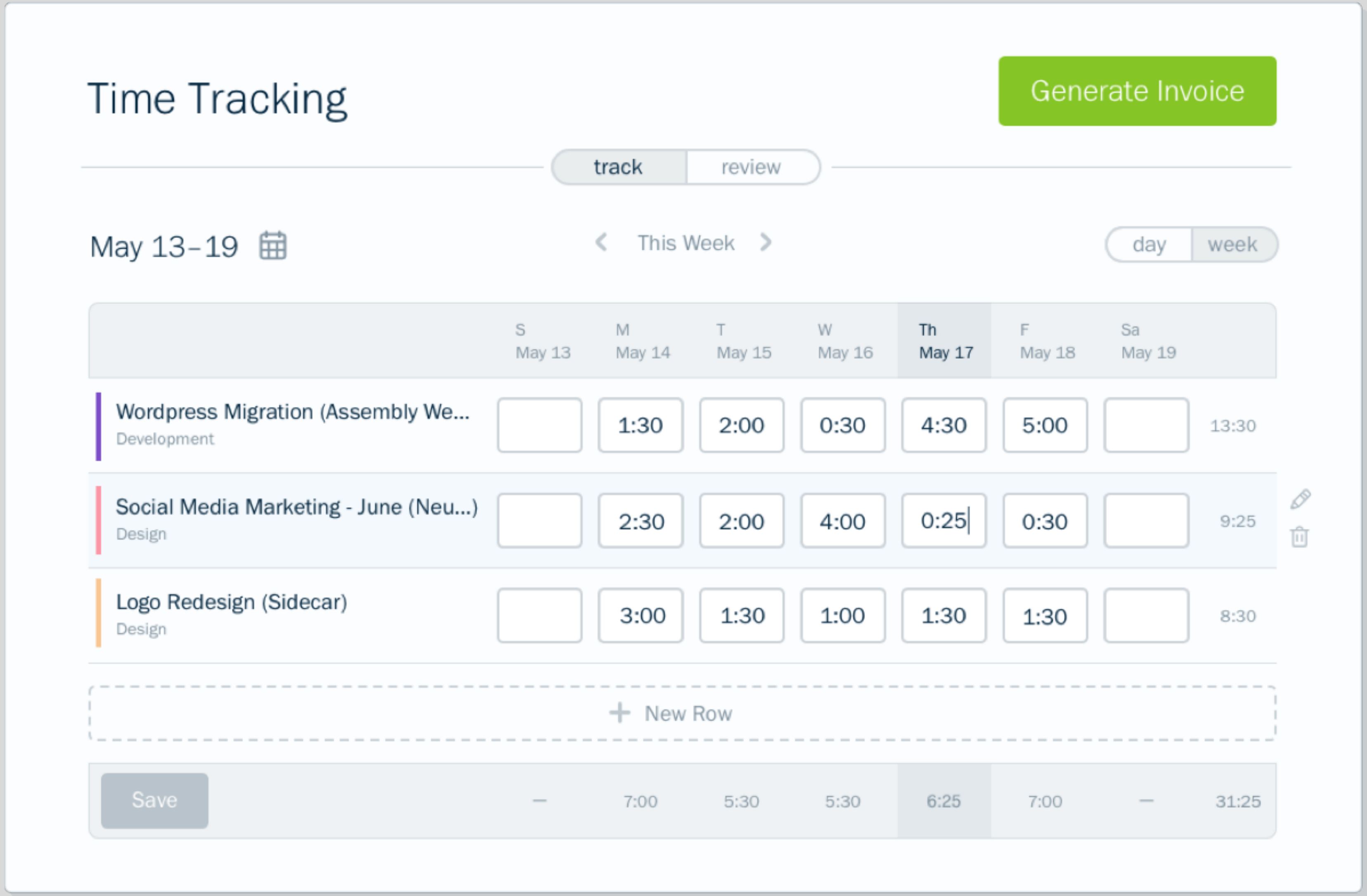
Alternative Options for Practice Management

- Work management software - Asana



Alternative Options for Time Tracking/Invoicing

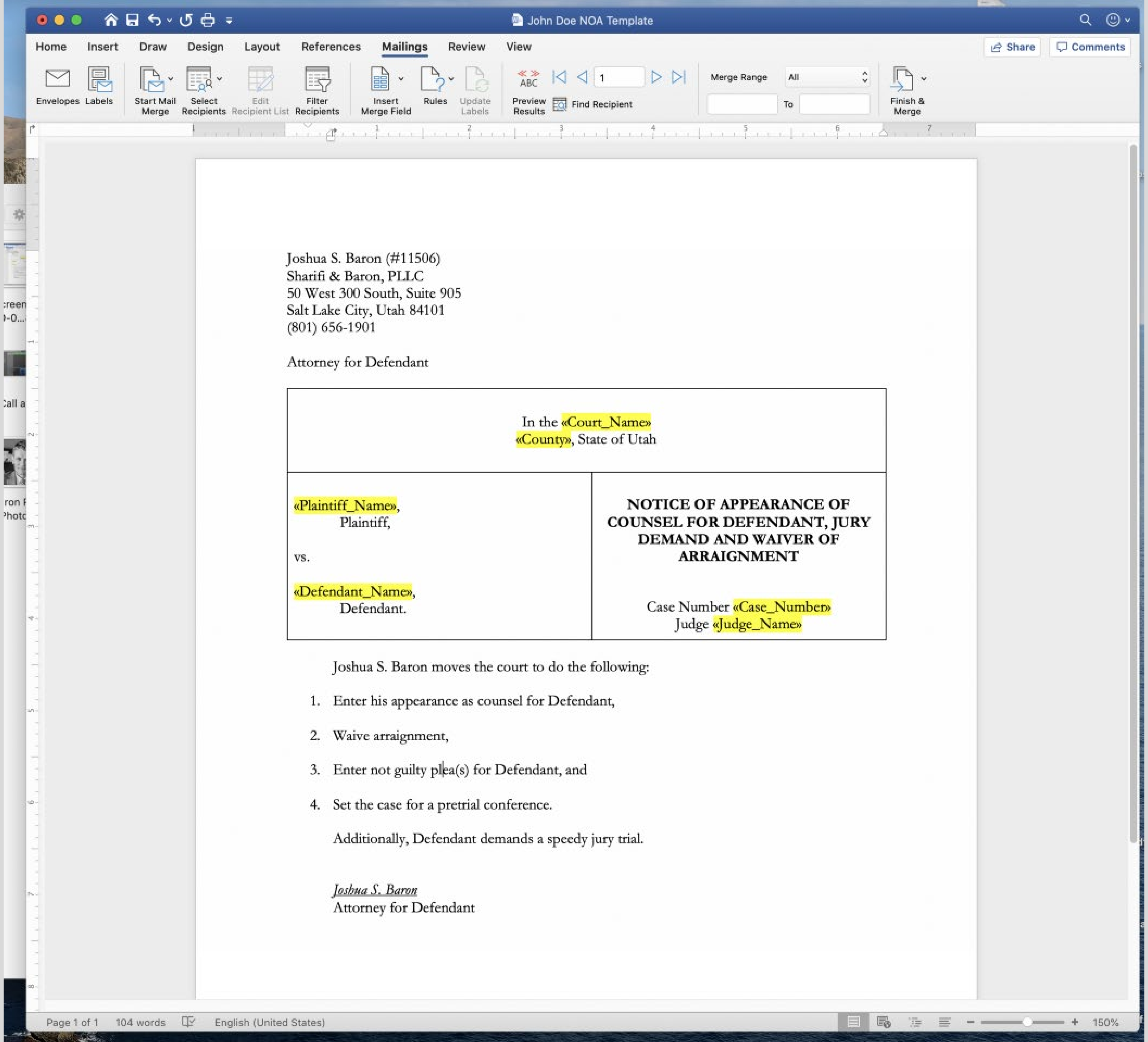
- Freshbooks



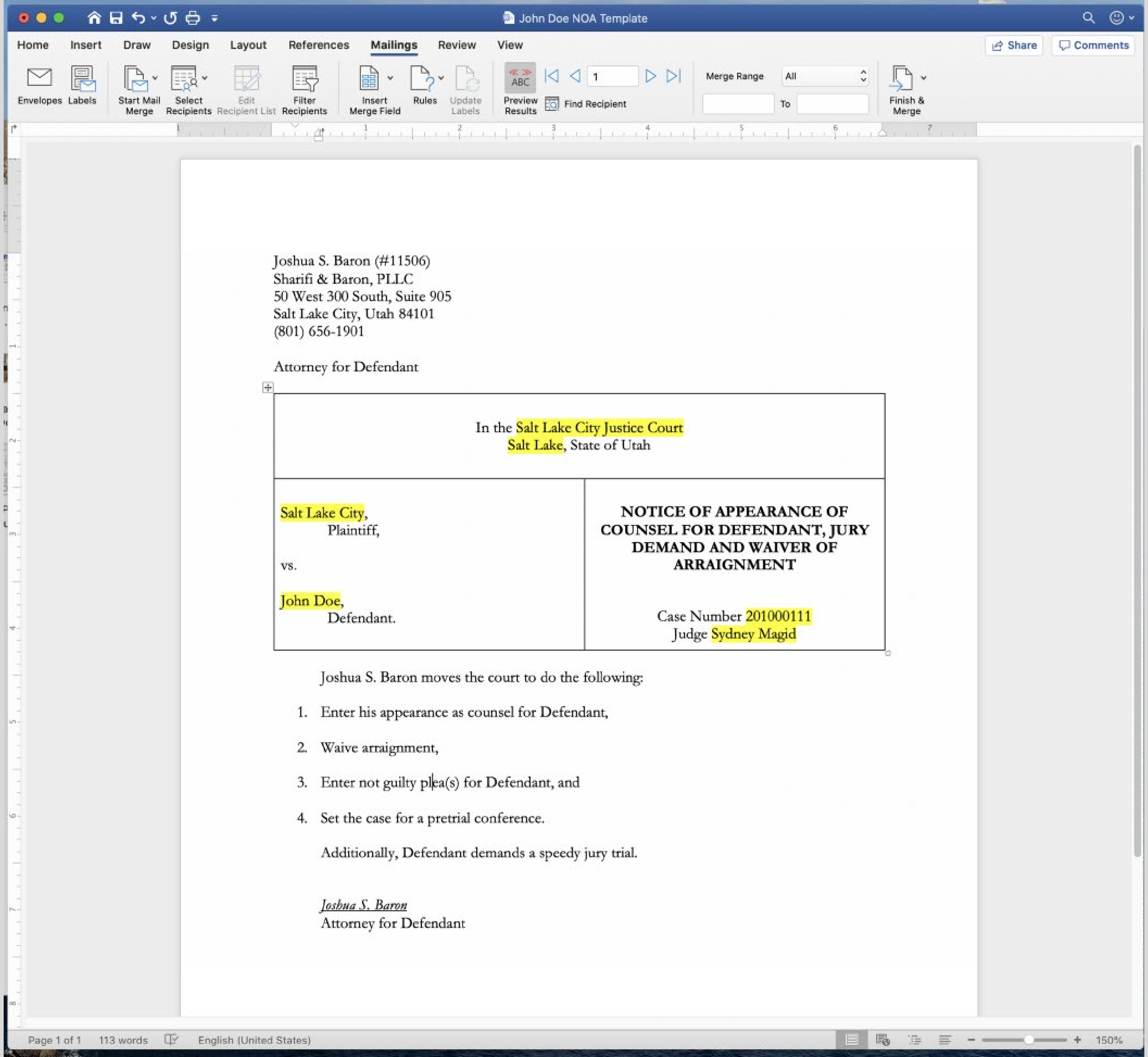
Automating legal forms with Mail Merge

- You need a word document and a spreadsheet
- Can be used for fee agreements, pleadings, forms, and any other document that gets used regularly in your practice
- Saves time
- Reduces errors
- Allows more legal work and less admin work
- How to do it

INSERT MERGE FIELDS FOR EVERY WORD OR PHRASE THAT YOU WANT FILLED AUTOMATICALLY



WHEN YOU MERGE YOUR SPREADSHEET DATA, YOUR FORM WILL AUTOMATICALLY FILL WITH THE DATA



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Attorney for Defendant

In the Salt Lake City Justice Court Salt Lake, State of Utah	
Salt Lake City, Plaintiff, vs. John Doe, Defendant.	**NOTICE OF APPEARANCE OF COUNSEL FOR DEFENDANT, JURY DEMAND AND WAIVER OF ARRAIGNMENT** Case Number 201000111 Judge Sydney Magid

Joshua S. Baron moves the court to do the following:

1. Enter his appearance as counsel for Defendant,
2. Waive arraignment,
3. Enter not guilty plea(s) for Defendant, and
4. Set the case for a pretrial conference.

Additionally, Defendant demands a speedy jury trial.

Joshua S. Baron
Attorney for Defendant

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