



D.C. Bar Practice Management Advisory Service

Basic Training & Beyond
January 2020

Rochelle D. Washington, Practice Management Advisor

Day 2 Topics



LAW FIRM
MANAGEMENT



CLIENT RELATIONS



MARKETING



Regulation

Know the Rules

Know Where to Get Help

Get a Mentor

New PMAS Offerings

Law Firm Management Self-Check is our new confidential self assessment quiz. See how you score.



Practice 360° Newsletter

Calendar

Networking

**Thursday, January 9,
Noon,** *Increasing Revenue and Reducing Expenses in Your Practice*, presented by Geoff Gilbert of [Coach for Executives](#). The D.C. Bar, 901 Fourth Street NW, Washington, DC
RSVP to lunchandlearn@dcbar.org

Friday, January 10, 12:30 p.m., Alto Fumo, 2909 Wilson Boulevard, Arlington, VA (Clarendon Metro)
RSVP to steven@stevenkriegerlaw.com

Lunch and Learn

All programs begin at Noon. You may attend in person or by video conference. Register for any or all at lunchandlearn@dcbar.org

January 9, 2020
Increasing Revenue and Reducing Expenses in Your Practice, presented by Geoff Gilbert of [Coach for Executives](#).

Most lawyers (and businesses) focus too much on expenses and not enough on increasing revenue. Learn how to balance your efforts so revenues far outgrow expenses.

Register

January 16, 2020
Running on Empty: Burnout in the Legal Profession, presented by Niki Irish of the [D.C. Bar Lawyer Assistance Program](#).

The World Health Organization defines burnout as a syndrome "resulting from chronic workplace stress that has not been successfully managed." The primary symptoms include

Sign up to
receive our
PMAS
Practice 360°
Newsletter

Law Firm Management



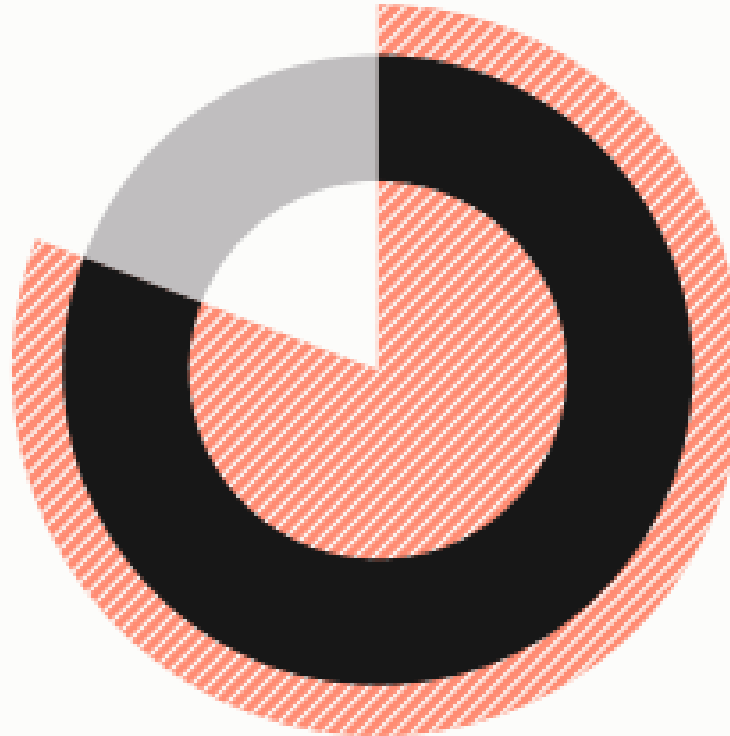
○ Utilization rate



Number of billable
hours worked ÷ number
of hours in a day =

31%

○ Realization rate



Number of billable
hours invoiced ÷ number
of hours worked =

81%

○ Collection rate

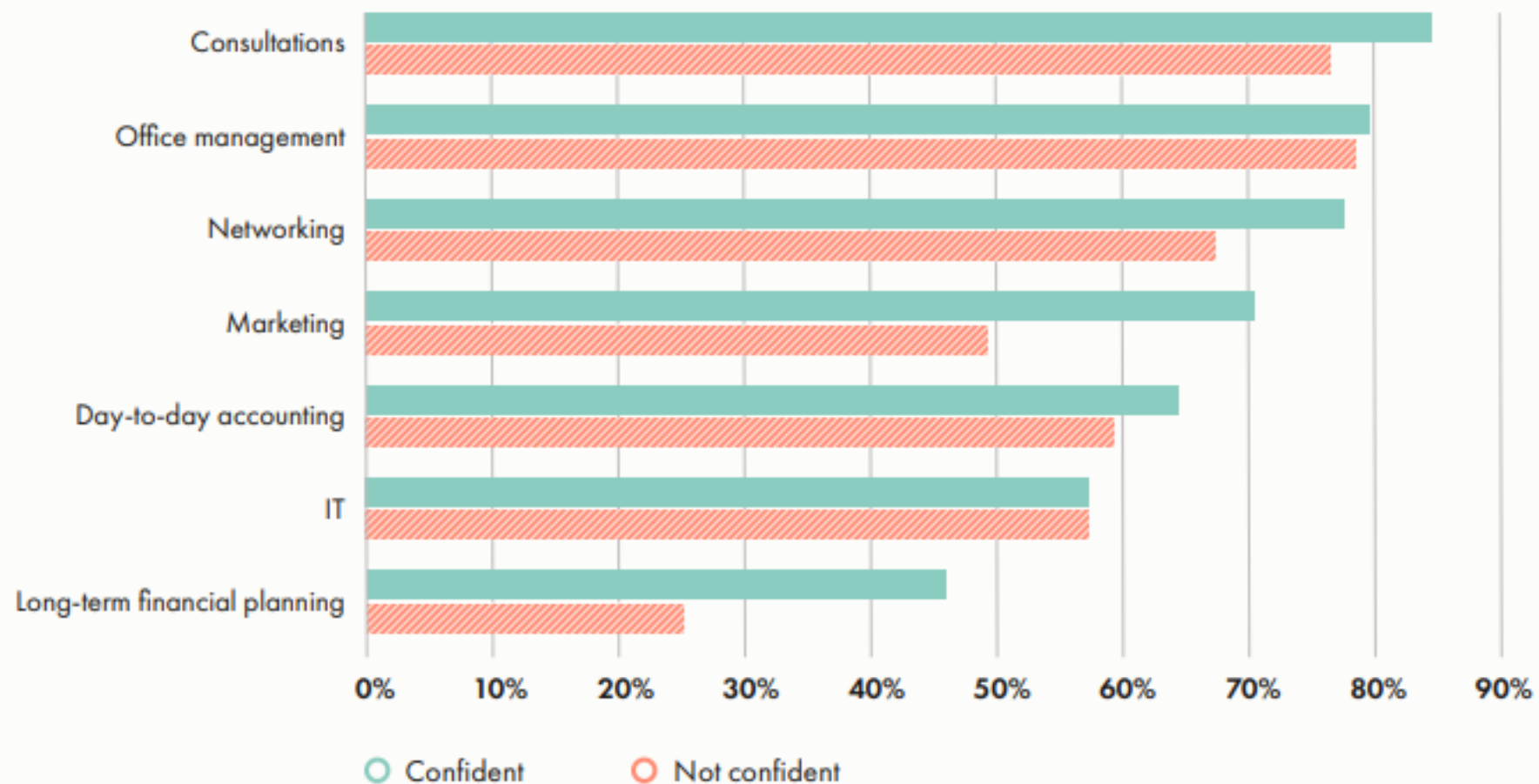


Number of hours
collected ÷ number
of hours invoiced =

86%

**The average lawyer worked just 2.5 hours
of billable work each day in 2018**

○ Business areas firm managers often engage in



How Lawyers Measure Success

Measures of Success





A
business
plan in
writing

Law Office Systems

Intake

File Set-Up

File Contents

File Maintenance

Conflict Check

Case Management

Calendar/Docket System

Time and Billing

Office Accounting

Trust Accounting



Client Intake Process

- Consultation Agreements?
- Intake Forms/ Pre-Screening
- Conflicts Check
- Office Policies
- Fee Agreements
- Automate

Automated Process



<http://garnerlawpllc.com/>

What's in a name?

Example:

- **02001JJ**= First file opened in 2002, client Jesse James
 - **JJ-W02**= A will file opened for Jesse James in 2002
 - **020001-W**= same as above but no client name
 - **02001-1**= Categorize types of file by number. Wills are #1
-
- My system: **D-14-101**= 1st opened Divorce file of 2014

File Set-up

Fee Agreement

New matter info sheet

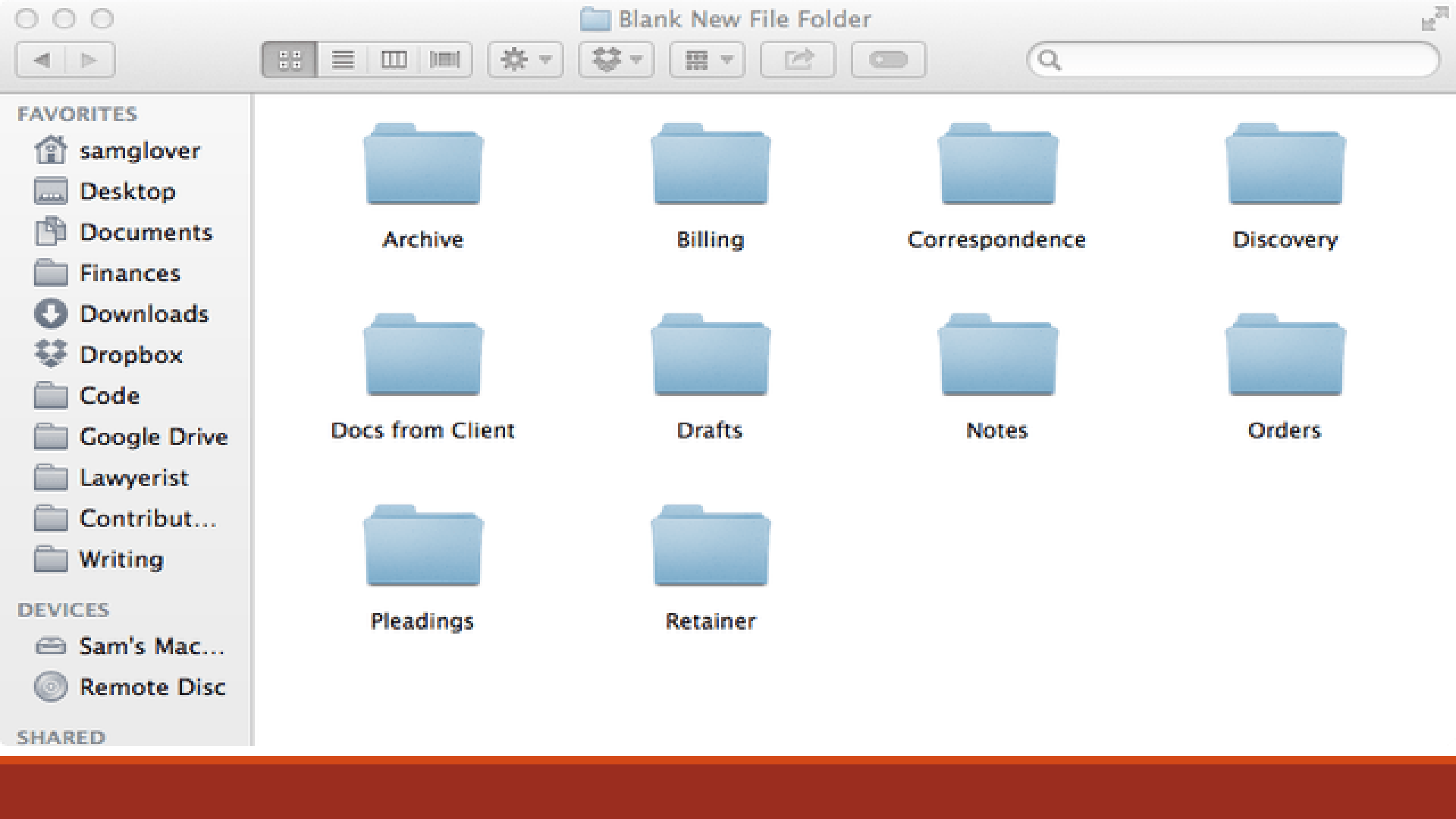
Case notes

Telephone messages












Log

Discovery docs



Expense log













FAVORITES

-  samglover
-  Desktop
-  Documents
-  Finances
-  Downloads
-  Dropbox
-  Code
-  Google Drive
-  Lawyerist
-  Contribut...
-  Writing

DEVICES

-  Sam's Mac...
-  Remote Disc

SHARED

- | | | | |
|-------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| 
Archive | 
Billing | 
Correspondence | 
Discovery |
| 
Docs from Client | 
Drafts | 
Notes | 
Orders |
| 
Pleadings | 
Retainer | | |

File Maintenance

Conflict Check! D.C. Rule 1.7

Keep a master log of all files

Consistent naming conventions

File location management system

Consider storage

Case Management Case & Action Manager- Manual

[illegible]

Can use separate systems for court dates and then other appointments (not recommended)

Use one uniform system that includes all important dates

Office procedure in place to get all court notices placed on calendar

Office procedure for deadlines

Calendar/Docket

Billing System: Track Your Time Now!

- Manual or electronic- but do it now not later!
- Saves you time
- Makes you Money
- Helps you bill timely and consistently



Content of your invoices will improve

Better explanation of the work

More likely to be fair and accurate

Review before they are sent to client

Block out time to do this!

Include all you did, even if you take off billing time

Tracking time now means...

Make Invoices Look Good





Include:

Date

Time worked

Expenses incurred

Prominently display the amount owed

Timeframe for client to dispute

How you take payments

Email or Snail mail, know your clients expectations

01

Follow the
terms in your
fee agreement

02

Bill when you
say you will

03

If you don't
send- they
won't pay

04

Don't include
invoice with
work product-
keep separate

Invoice Timing



A Few Suggestions:

Resist billing for more than two hour blocks for work. (break up the entries)

Total up smaller entries (avoid appearance of nickel and diming)

When invoice is larger than normal send before normal cycle to give client a heads up

A Few Suggestions:

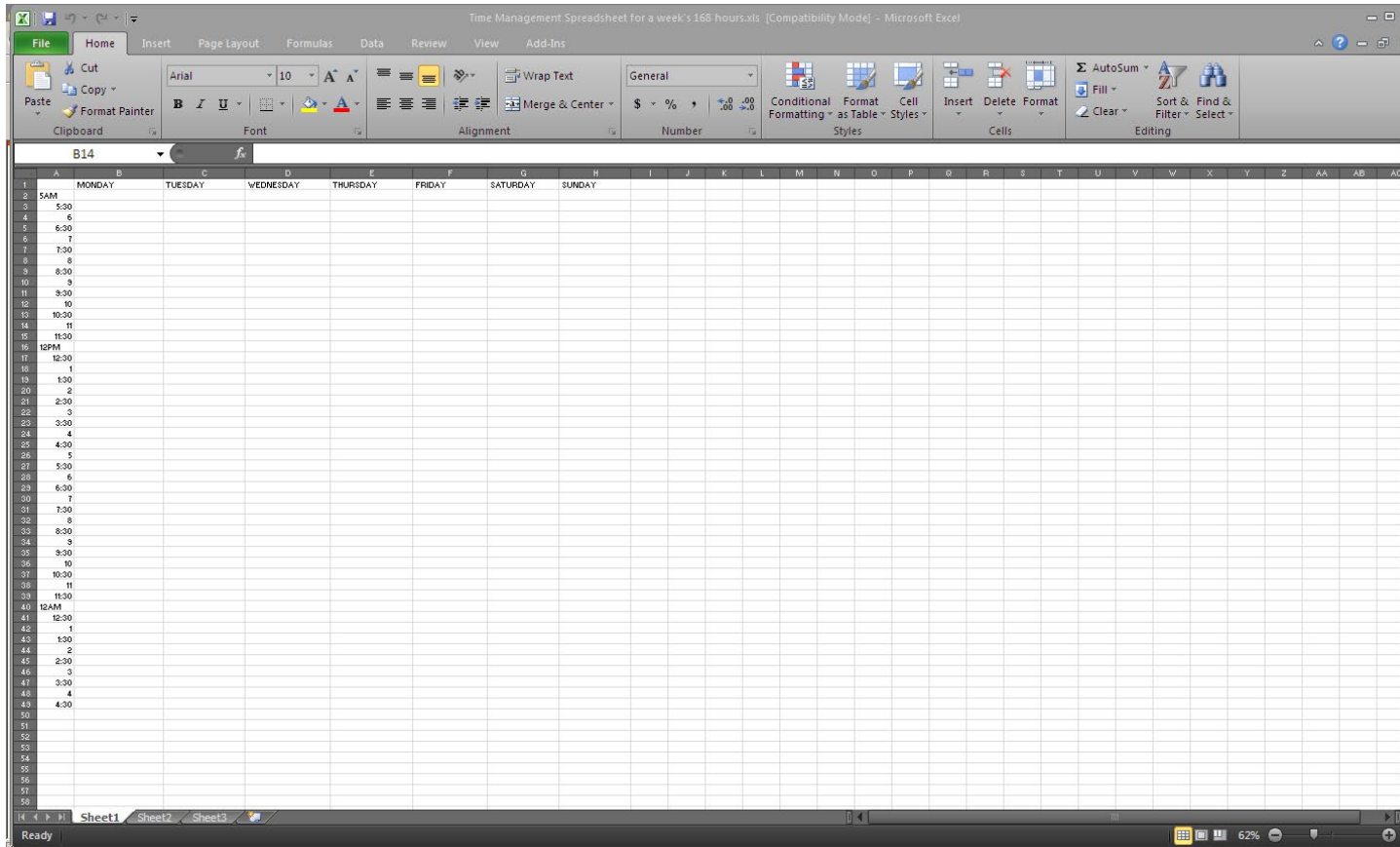
- Avoid Duplicate entries
- Provide Dispute Options
- Automate!





If they do not pay:

- Collections process
- Standardized letters
- Follow-up
- Don't Delay
- Set expectations
- Be Consistent
- Earn their respect

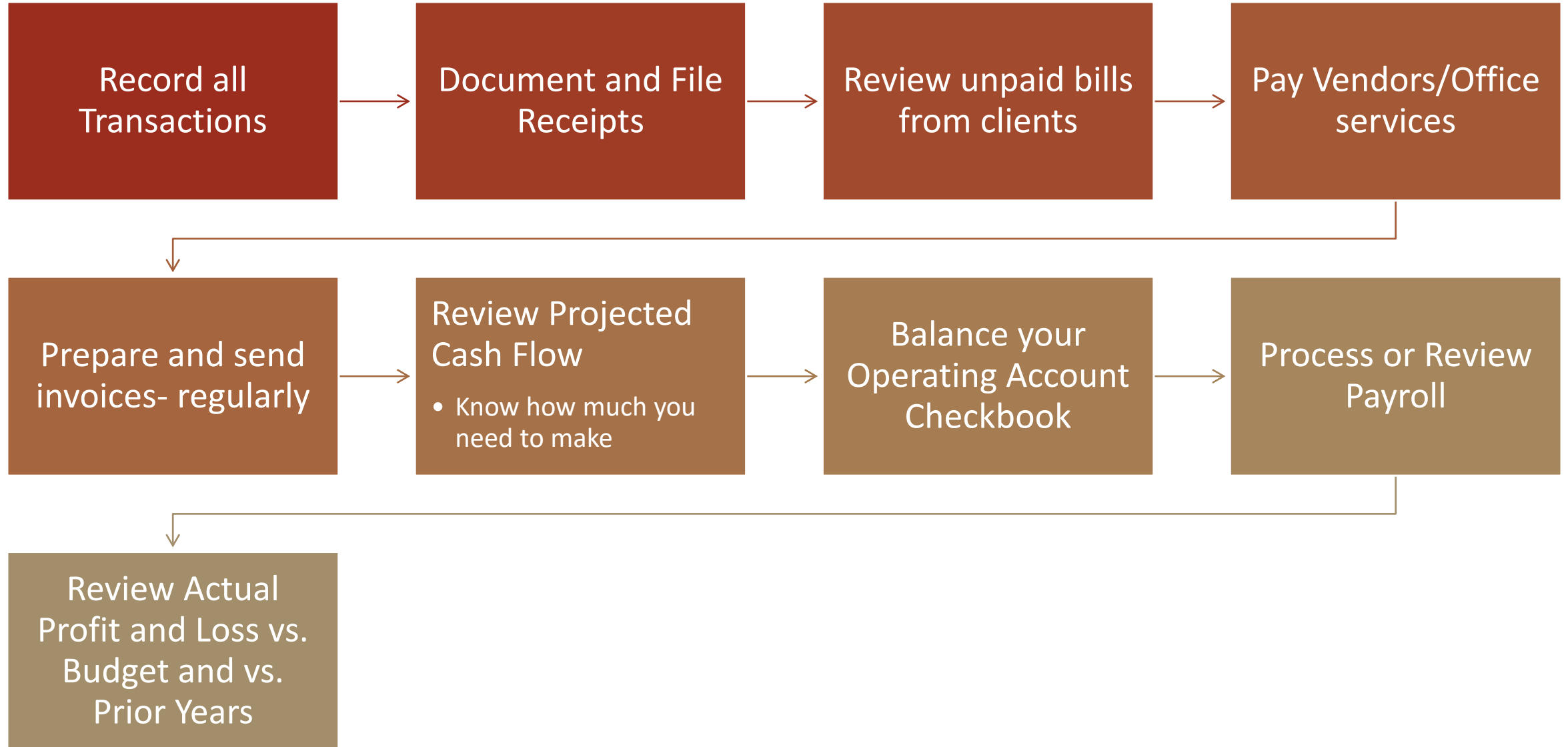


Time Management Sheet

Office Accounting Procedures

- Basic Book-keeping
 - Tracking your business expenses
 - Effective debiting and crediting procedures
- Balance Sheet
 - Assets = Equity + Liabilities
 - How much you owe and what you own

Accounting Tips



Productivity

1

The simple secret to
productivity

2


Block out Time -
important times for
all ongoing task

3

Being disciplined

Managing time . . .

Working smarter . . .



How do you
work the most
efficiently and
effectively

What are the
tools you need

1. Name your workflow

2. Identify Start and End Points

3. Identify what is need to perform the process

4. List any task and activities

5. Identify the order task should be accomplished

6. Identify roles

7. Identify your flowchart type and draw it out

8. Review and finalize

9. Use a workflow automation tool to create your actual workflow

Create Workflows



TECHNOLOGY
IS
Key

Introducing A New Name: Business & Tech.

Every business is a technology business. Whether it's taxi cabs or taco delivery, today's enterprises are urgently figuring out ways to manage the growth of information technology and to turn its disruptive potential to their advantage.

Algorithms direct our doctors and instruct our farmers. They will increasingly guide nearly every function in the modern enter-

C

Envi
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BY DA

Wh
velop

The Wall Street Journal declared
“Every business is a technology business.”

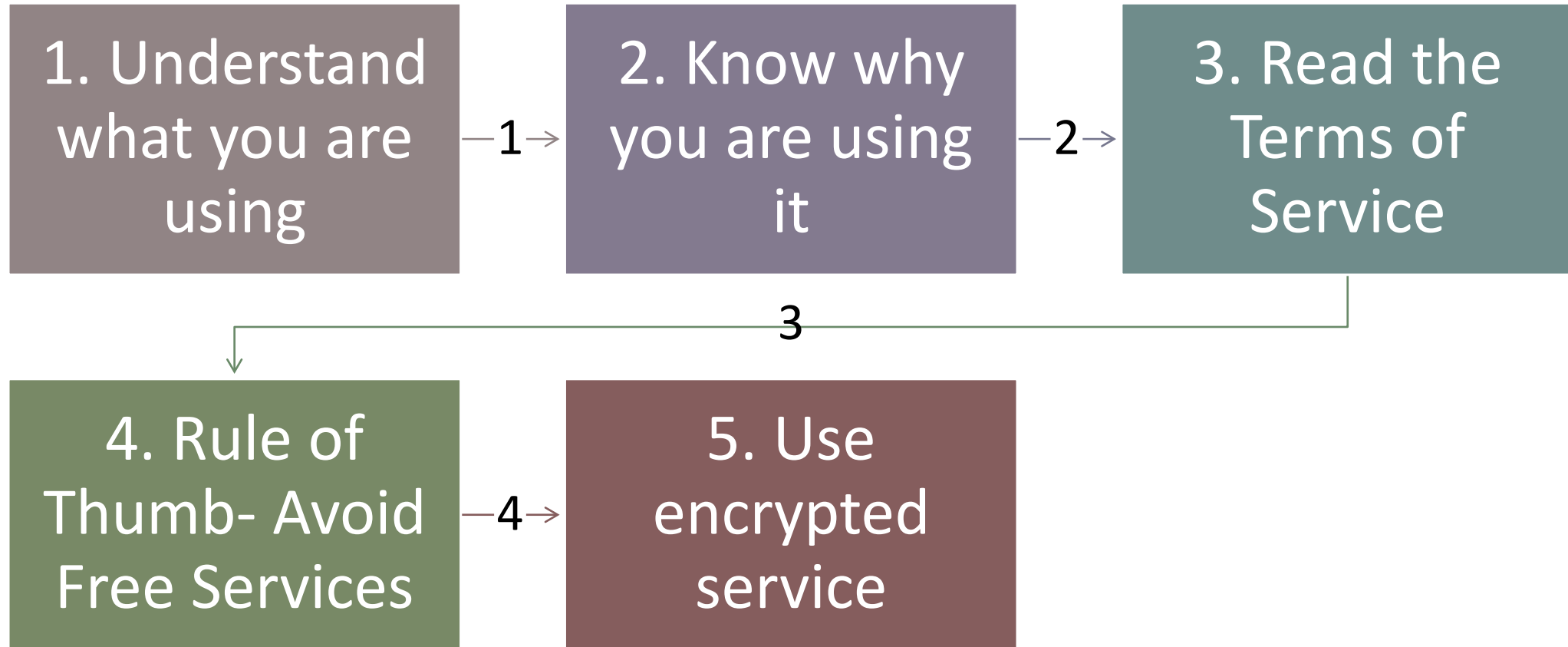
How Technology Helps You



Ethical Obligation to Understand the Tech you implement in
your law office



Tech Implementation – Best Practices



Do you really need an office?

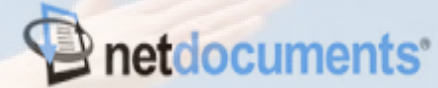


Virtual Office

Brick and Mortar

The Virtual Office

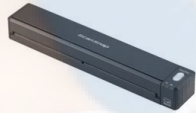
Laptop



Paper Management



Phone



Printer/scanner/copier

Virtual Office



Conference/meeting room



Website



Email/web hosting



Case Management



Answering Service



OSIOFFICES



Virtual Law Firm

www.garnerlawpllc.com

www.mdfamilylawyer.com



Monitors the More the Merrier!



Printer and
Scanner

And if you REALLY want to go Virtual....



A Client Facing Legal Document Automation Platform Plus a Virtual Law Office

DirectLaw is a secure, cloud-based solution that enables the delivery of Online Legal Services

Free 30 Day Trial

No Obligation. No credit card required.

Watch the Video:



Key Features of the DirectLaw Virtual Law Firm Platform



See How Our Document Automation Solution Works Inside the DirectLaw Platform

Read the Whitepaper:

HOME

LEGAL SERVICES

LEGAL ADVICE

DIVORCE GUIDE

ABOUT US

FAQ

SUPPORT

SEARCH

LOGIN



DIVORCE YOU CAN AFFORD

Consider Divorce Mediation If You Have A Conflict

[Read More](#)



When do you need tech?

Automate

Delegate

Eliminate

How to Choose Technology for your Law Office

1. Attractive/Appealing

2. Intuitive

3. Utility

4. Price Point

5. Secure

1. Steve Jobs

2. Word vs. Word Perfect

3. Functionality for your firm

4. Bottom Line

5. Safe for client data?

Block out Time

Try at least 3

Confirm capabilities and Intuitiveness

Like the look and feel

Allows for your billing methods

Integration with other products (accounting)

Electronic/ Batch Invoicing option

Accounts Receivables

WIP view

Selecting Your Product



HOW TO GO PAPERLESS IN 2019: A MONTH-BY-MONTH PLAN

👤 Larry Port 🕒 January 25, 2019 📁 Quick Tips 💬 0 Comments

<https://www.lawtechnologytoday.org/2019/01/how-to-go-paperless-in-2019/>



BENEFITS AND SAVINGS

REASONS TO GO PAPERLESS

ONE



SAVES TIME

TWO



USE LESS SPACE

THREE



BETTER SECURITY



\$10,000

\$10,000

estimated savings per year at an
EIGHT-EMPLOYEE company



\$1,000,000

\$1,000,000

estimated savings per year at a
370-EMPLOYEE company

A FEW GREAT TECH TOOLS



SAAS vs. Software on PC



TIME TO UPDATE



Basic Technology for Lawyers

- Case Management Software
- Word Processing/Business Suite
- Accounting/Bookkeeping
- Time and Billing
- Document Automation
- Document Management Storage
- Encrypted Email
- Answering Service
- Electronic Signatures

CASE

MANAGEMENT

GET SMART





Clio

The Clio Suite is cloud-based law firm software that will transform the way your law firm operates—from the first intake call to the last invoice ...



User reviews: **1,023**
Average rating: **4.7**

[VISIT WEBSITE](#)

[LEARN MORE](#)



MyCase

MyCase legal practice management software helps law firms solve key business challenges, including getting paid faster, keeping cases on track, and ...



User reviews: **310**
Average rating: **4.7**

[VISIT WEBSITE](#)

[LEARN MORE](#)



PracticePanther

Highest rated legal case management software on GetApp. Perfect for lawyers and law firms of all sizes.



User reviews: **323**
Average rating: **4.78**

[VISIT WEBSITE](#)

[LEARN MORE](#)



Aderant Expert ...

Aderant Expert Sierra is a legal case and practice management solution for mid-size law firms (15-150 users) and legal professionals.



User reviews: **7**
Average rating: **4.43**

[VISIT WEBSITE](#)

[LEARN MORE](#)



LegalEdge

LegalEdge is a web-based platform, which assists government attorneys, agencies, school districts, & city or county lawyers with streamlining ...



User reviews: **0**
Average rating: **N/A**

[VISIT WEBSITE](#)

[LEARN MORE](#)



Actionstep

Actionstep is a top-rated law firm management system, built in the cloud with automation at its heart. Giving lawyers more headspace to make a ...



User reviews: **91**
Average rating: **4.41**

[VISIT WEBSITE](#)

[LEARN MORE](#)



Zola Suite

See why Zola is the FASTEST-GROWING practice management software. Industry-leading features such as patented email management, robust billing & ...



User reviews: **99**
Average rating: **4.63**

[VISIT WEBSITE](#)

[LEARN MORE](#)



CosmoLex

CosmoLex is the ONLY Cloud-based, all-in-one practice management, billing, AND accounting system (No QuickBooks Required).



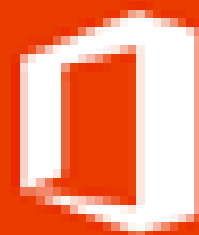
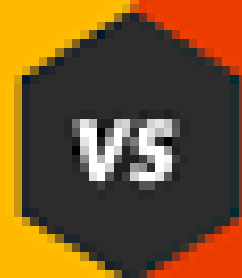
User reviews: **276**
Average rating: **4.73**

[VISIT WEBSITE](#)

[LEARN MORE](#)

[Click here](#)

G Suite



Office 365



Simple Document Management

[Google Drive vs. Microsoft OneDrive: A point-by-point comparison](#)

PC World 12/2019

Document Automation



Calendar System



Time and Billing



BillQuick

<https://lawyerist.com/law-practice-management-software/>

CLOUD FILE MANAGEMENT



www.citrix.com

www.onedrive.com

www.box.com

www.dropbox.com

[Click here to see comparison](#)

The Lawyer's Options



~~\$199.99~~
\$174.⁹⁹

Dragon Premium Version 13

Interact with your PC by voice, with greater freedom and flexibility.



Now
\$299.⁹⁹

Dragon Premium Wireless

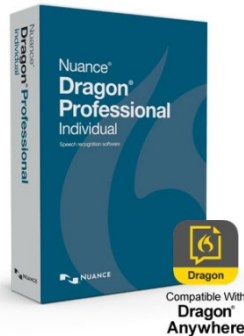
Dictate to your computer with a Dragon wireless Bluetooth headset.



Now
\$299.⁹⁹

Dragon Premium Mobile

Transcribe on the go with the included Nuance certified Philips Digital Voice Recorder.



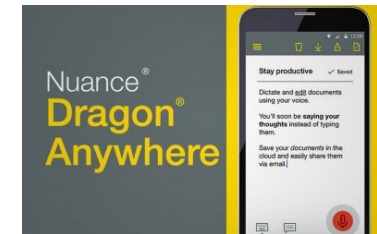
Dragon Professional Individual

New in 2015 **\$300**



Dragon Legal Individual

New in 2016
Starting at \$500



Dragon Anywhere for Android and iOS

New in 2015
\$15 per month to \$150 per year

Office Accounting



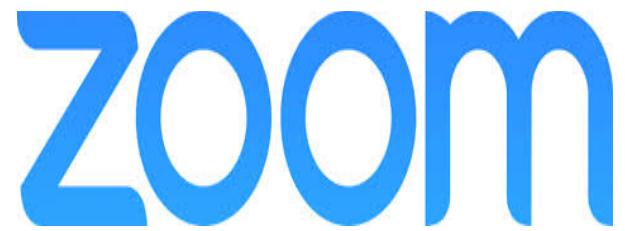
www.quickbooks.com

www.xero.com

www.wave.com

www.freshbooks.com

Video is the Way to Go!

The Zoom logo, consisting of the word "zoom" in a blue, lowercase, sans-serif font.

[Compare](#) here or [Compare](#) here

Electronic Signatures



- www.echosign.adobe.com
- www.docusign.com
- www.rightsignature.com
- www.hellosign.com

How E-Signatures Work



Electronic Fax



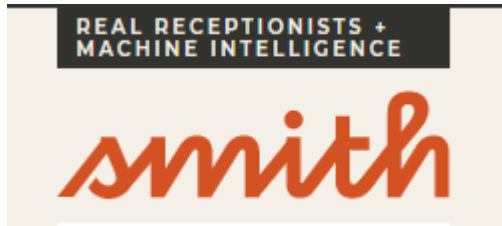
- <http://Faxzero.com>
- www.efax.com

Legal Research

Fastcase is a Member Benefit at many bar associations



Outsource It!



- www.smith.ai
- www.callruby.com
- www.upwork.com
- www.Virtualparalegalservices.com
- www.Atlasvirtualparalegal.com

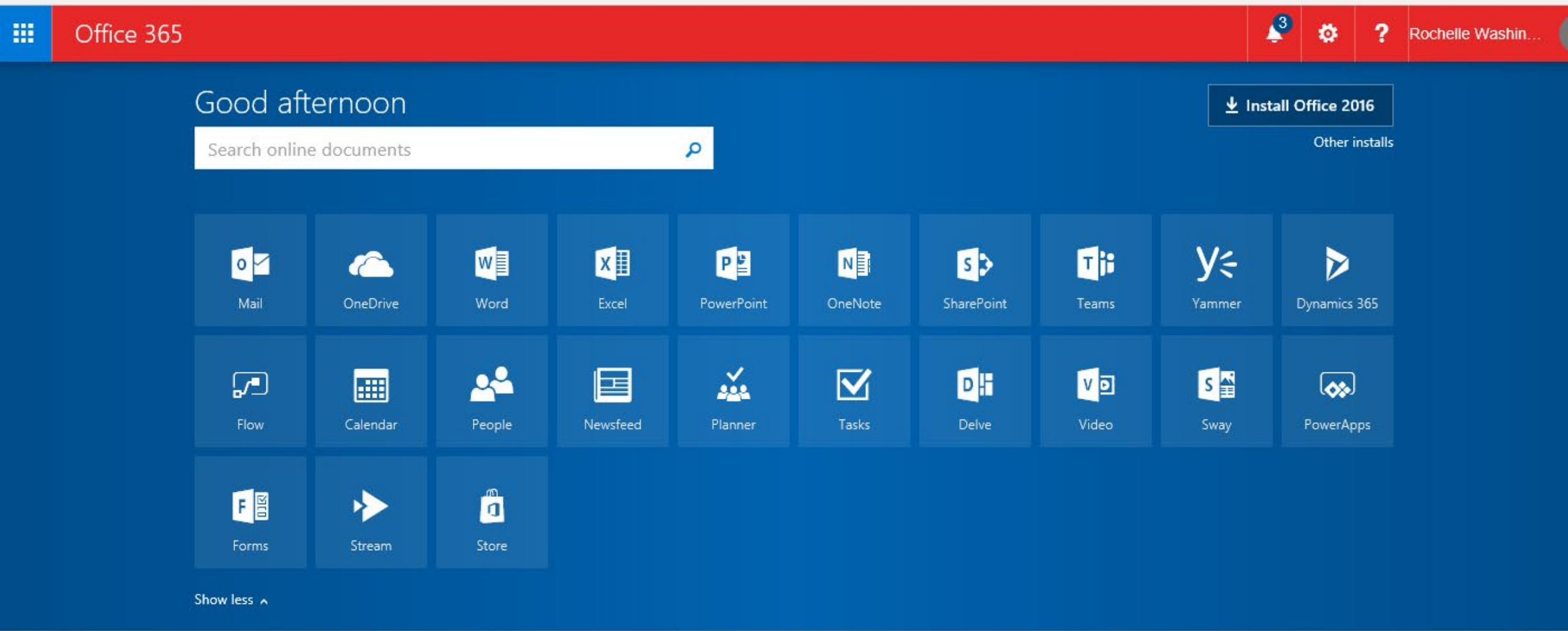


Data Back-up



- www.mozy.com *
- www.carbonite.com
- www.ironmountain.com





Office 365

Office 365 Business

\$8.25 user/month
(annual commitment)

[Buy now](#)

Best for businesses that need Office apps plus cloud file storage and sharing on PC, Mac, or mobile. Business email not included.

Office apps included



Outlook Word Excel PowerPoint



Access
(PC only)

Services included



OneDrive

Office 365 Business Premium

\$12.50 user/month
(annual commitment)

[Buy now](#)

Best for businesses that need business email, Office apps, and other business services on PC, Mac, or mobile.

Office apps included



Outlook Word Excel PowerPoint



Access
(PC only)

Services included



Exchange OneDrive SharePoint Teams

Office 365 Business Essentials

\$5.00 user/month
(annual commitment)

[Buy now](#)

Best for businesses that need business email and other business services on PC, Mac, or mobile. Desktop versions of Office apps not included.

Office apps included

(Web and mobile versions only) ¹

Services included



Exchange OneDrive SharePoint Teams

Not just Microsoft



Dropbox

Doodle®



17hats

zoom

zapier





Appointment Scheduling



calendly



Find Time*

(this will be rereleased and renamed October 2017)

HOW DO I START A POLL FOR A TIME TO MEET?

Sign in

- 1 Navigate to <http://www.office.com>.
- 2 Sign in
- 3 Open your calendar
- 4 Click **new**
- 5 Click **Poll for a time to meet**

The screenshot shows the Office 365 Outlook interface. On the left, a calendar for September 2017 is visible, with the 22nd highlighted. On the right, the 'New' dropdown menu is open, showing options: 'Calendar event', 'Poll for a time to meet' (highlighted with a red box and a red arrow), 'Email message', and 'Birthday event'. The top of the interface shows 'Office 365 | Outlook' and a search bar.

**ALWAYS READ TERMS OF
SERVICE**



ENCRYPTION



- www.sookasa.com
- www.boxcryptor.com
- www.spideroak.com

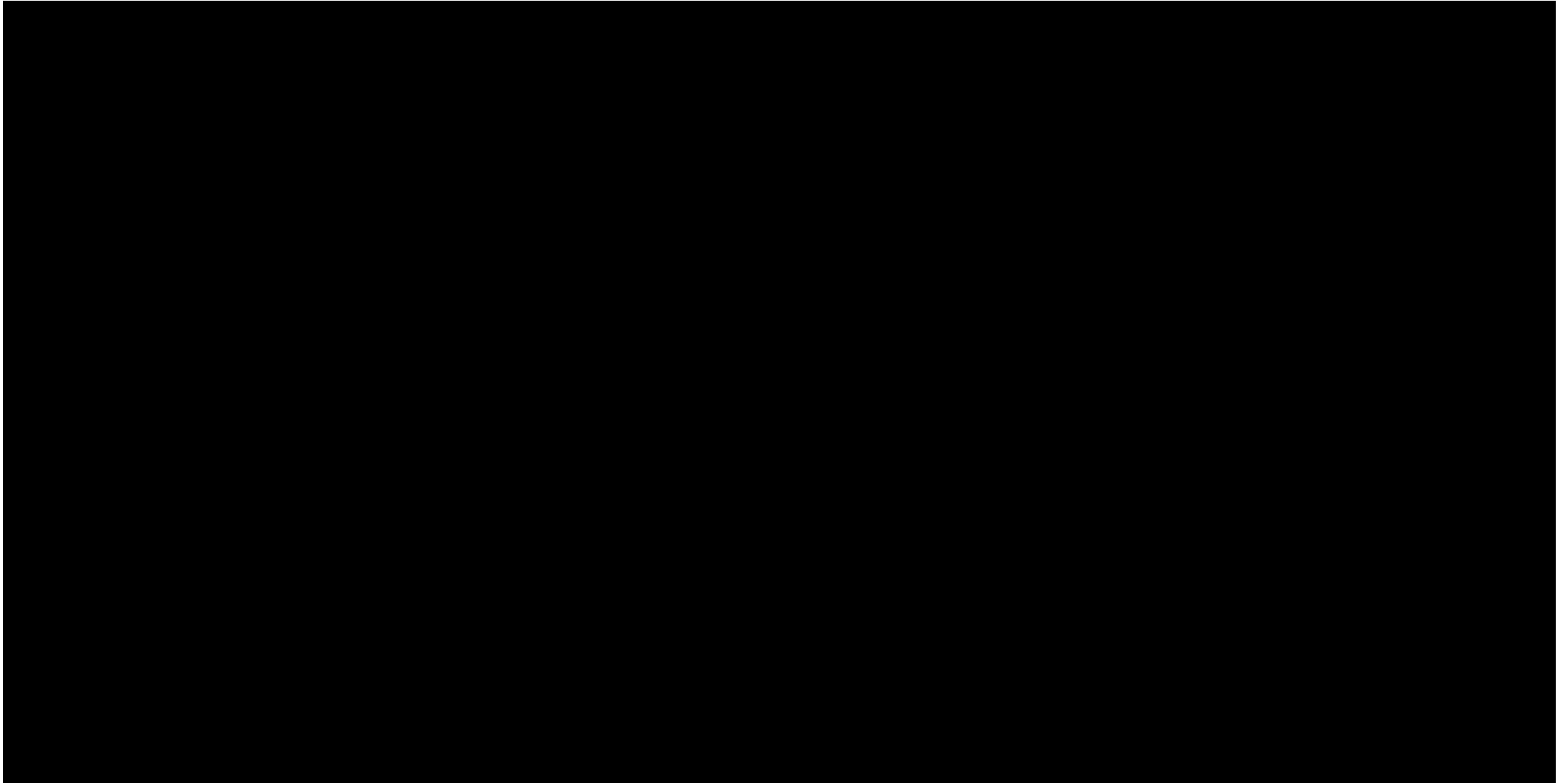


- (beware of companies that shut down ex. Cloudfogger.com)



EXTRA SECURITY MEASURES

OTHER SECURITY CONSIDERATIONS



Security



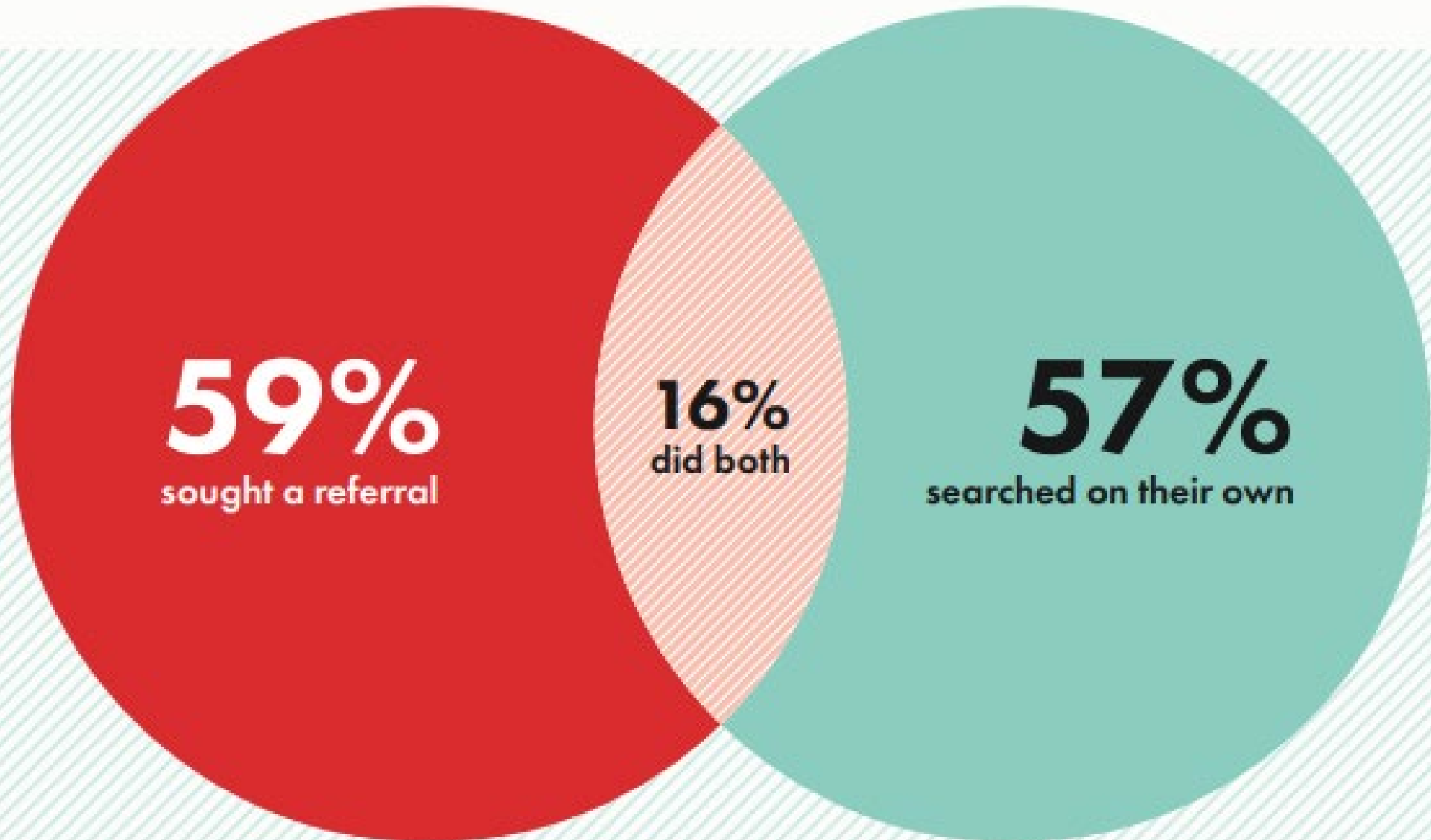
Email SCAMS

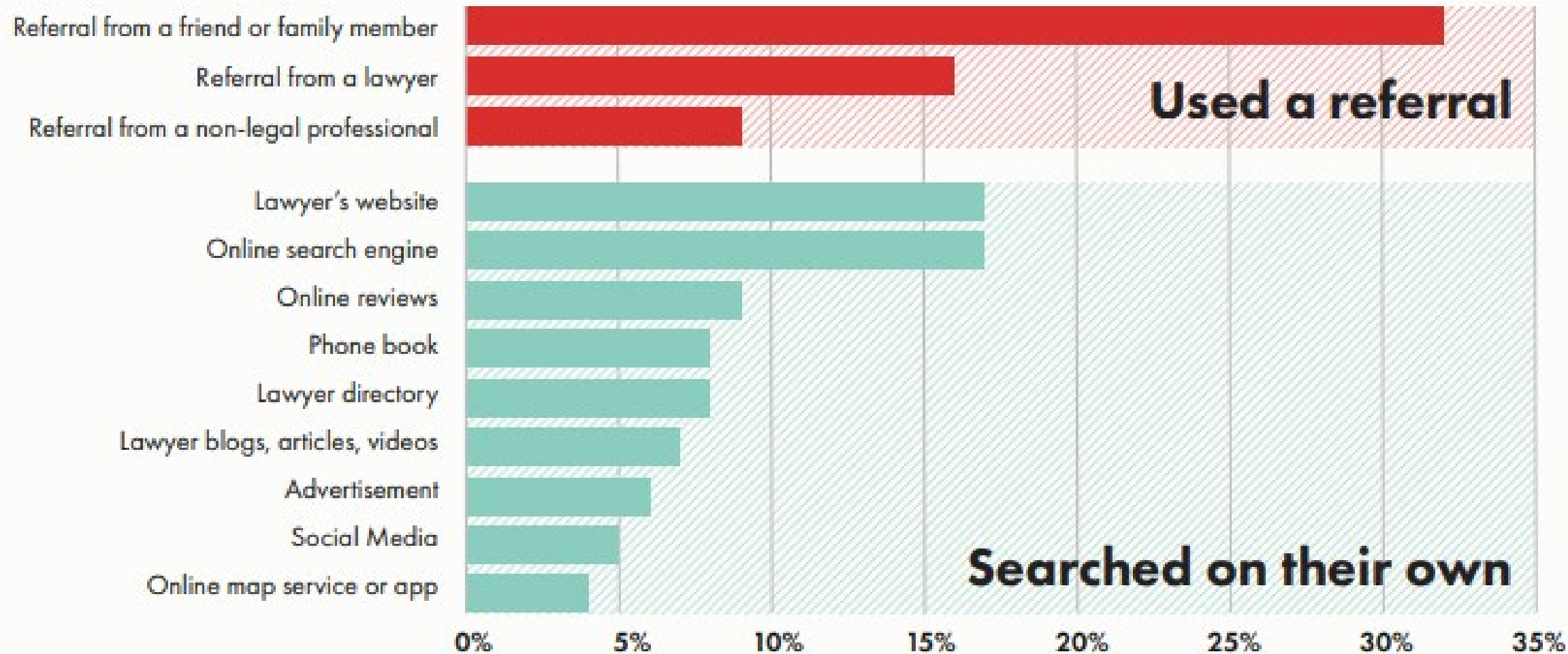


Client Relations



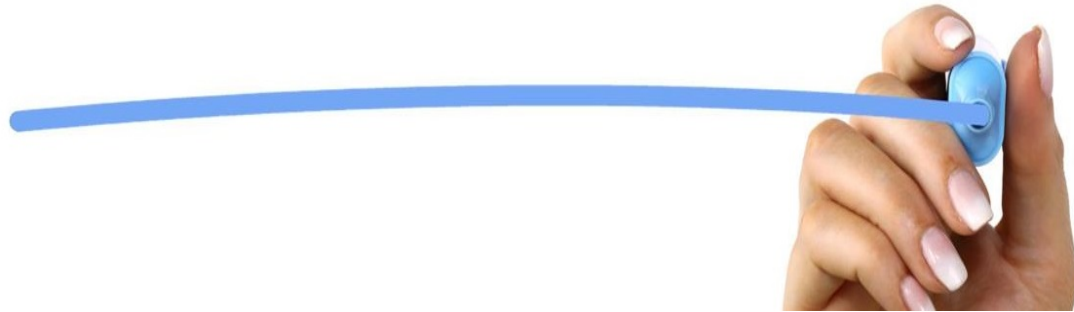
○ Clients seeking a referral versus searching on their own





18% of clients said they would never seek a referral from a friend or family member

CUSTOMER RELATIONSHIP MANAGEMENT



Know What the Client Wants

- Trust
- Competency
- Communication
(number one
complaint NEGLECT)
28%

- **77%** want to know a lawyer's experience and credentials (also ranked the most important).
 - **72%** want to know what types of cases they handle.
 - **70%** want a clear understanding of the legal process and what to expect.
 - **66%** want an estimate of the total cost for their case.
-

- **81%** want a response to each question they ask.
- **80%** say it's important to have a clear understanding of how to proceed.
- **76%** also want to get a clear sense of how much their legal issue could cost.
- **74%** want to know what the full process will look like for their case.

What do clients look for?

Honesty/Ethics Ratings

Please tell me how you would rate the honesty and ethical standards of people in these different fields -- very high, high, average, low or very low?
How about -- [RANDOM ORDER]?

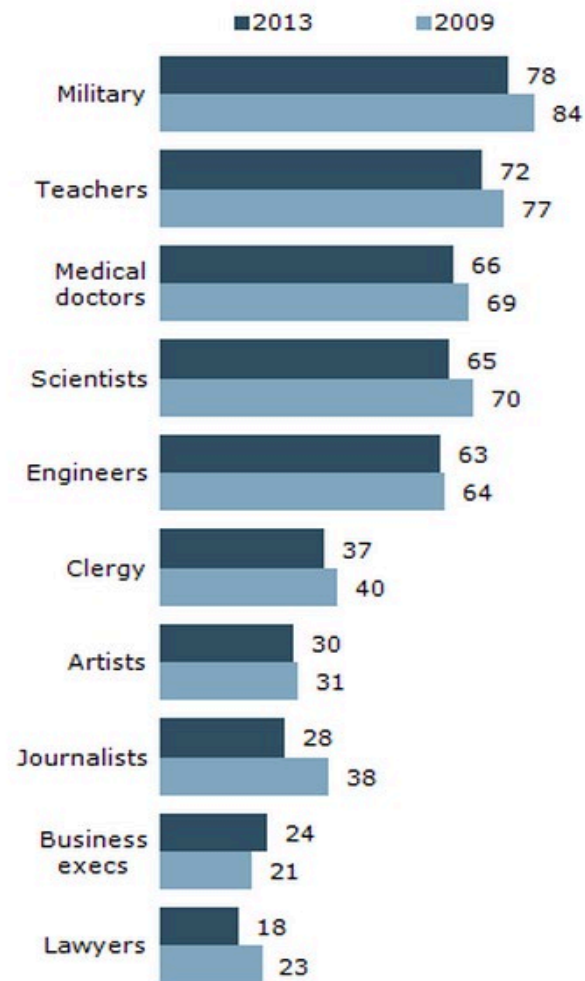
	Very High	High	Average	Low	Very Low
	%	%	%	%	%
Nurses	29	55	13	2	1
Pharmacists	15	52	26	6	2
Medical doctors	15	50	29	5	2
Engineers	13	52	29	4	1
Dentists	10	49	34	5	2
Police officers	16	42	29	10	3
College teachers	10	37	32	12	6
Clergy	12	32	39	9	4
Psychiatrists	6	32	45	9	3
Chiropractors	5	33	45	10	3
Bankers	2	22	46	22	8
Journalists	4	19	34	23	18
Lawyers	3	15	45	26	11
State governors	2	16	45	27	8
Business executives	2	15	50	23	9
Stockbrokers	2	10	46	28	11
HMO managers	1	11	48	23	8
Senators	1	11	37	36	14
Advertising practitioners	1	10	46	29	11
Insurance salespeople	1	10	51	28	10
Car salespeople	1	8	45	31	15
Members of Congress	1	7	31	39	20

Dec. 7-11, 2016

GALLUP

Trend in Perceived Contribution

% saying each group contributes "a lot" to society's well-being



Source: Pew Research Center surveys March 21-April 8, 2013 and April 28-May 12, 2009. Q6a-j. Responses of those who said some, not very much, nothing at all and those who did not give an answer are not shown.

PEW RESEARCH CENTER

Once Someone Needs a Lawyer, Negative Views of the Profession Fall

[HTTP://WWW.ABAJOURNAL.COM/LAWSCRIBBLER/ARTICLE/DO LAWYERS REALLY SUCK NO POTENTIAL CLIENTS ANTIPATHY CAN BE OVERCOME](http://www.abajournal.com/lawscribbler/article/do_lawyers_really_suck_no_potential_clients_antipathy_can_be_overcome)



Client
Relations
Starts with
Your Choice

Good Client Selection

Identify:

1. Who is the ideal client?
2. Characteristics of the ideal client?
3. Where are they and how do you find them?





The Goal

1. Solve the problem
2. Remain Ethical
3. Exceed expectations
4. Develop a referral source
5. Make a profit

I CAN HELP YOU
I'M REALLY GOOD
AT BAD DECISIONS



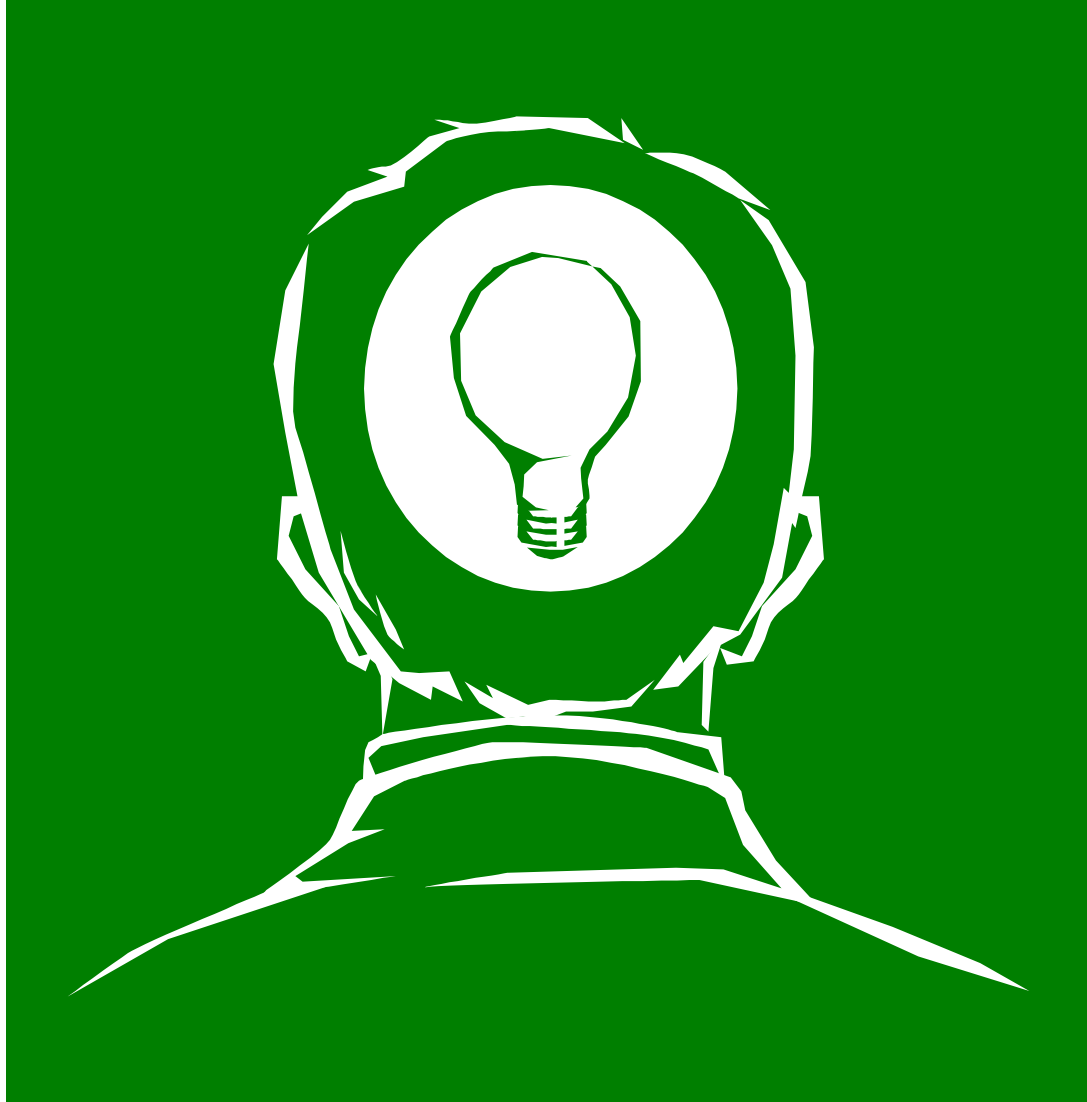
Ask Yourself:

1. Can I do this?
2. Is this in the Plan?
3. Do I want this case or client:
 - a. Is my fee reasonable?
 - b. Can they afford to pay?
 - c. Do you know their expectations?



So How ?

1. Questionnaire
 - a. Have they had a lawyer before
 - b. Check case viability
 - c. Can you handle
2. Google
 - a. Check public databases, social media, etc.
 - b. Take advance fee



How to Close- 10 Steps:

1. Thinking

Conflict Check

Consider a consultation agreement

Consider the fee you will charge



2. Opening the Discussion

- Ask how you can help
- Set an agenda
- LEO 374

Ethical Obligations Regarding
Prospective Client Information

3. Needs Assessment

Ask questions about the potential client

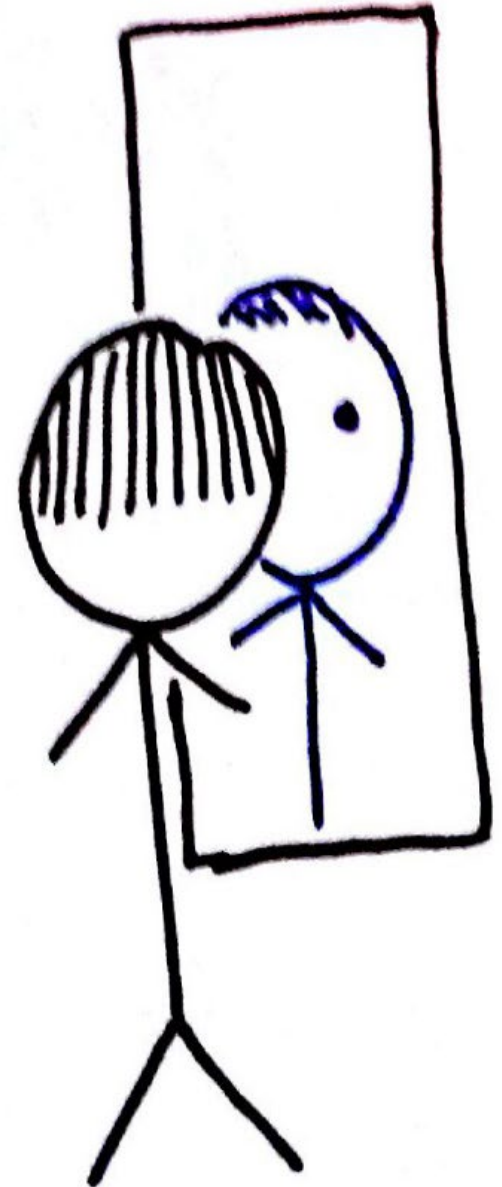
- Who
- What
- When
- Where
- Why
- How
- Listen to the answers and follow up as needed



4. Summarize/Restate

Restate your understanding

Mirror the PC's concerns





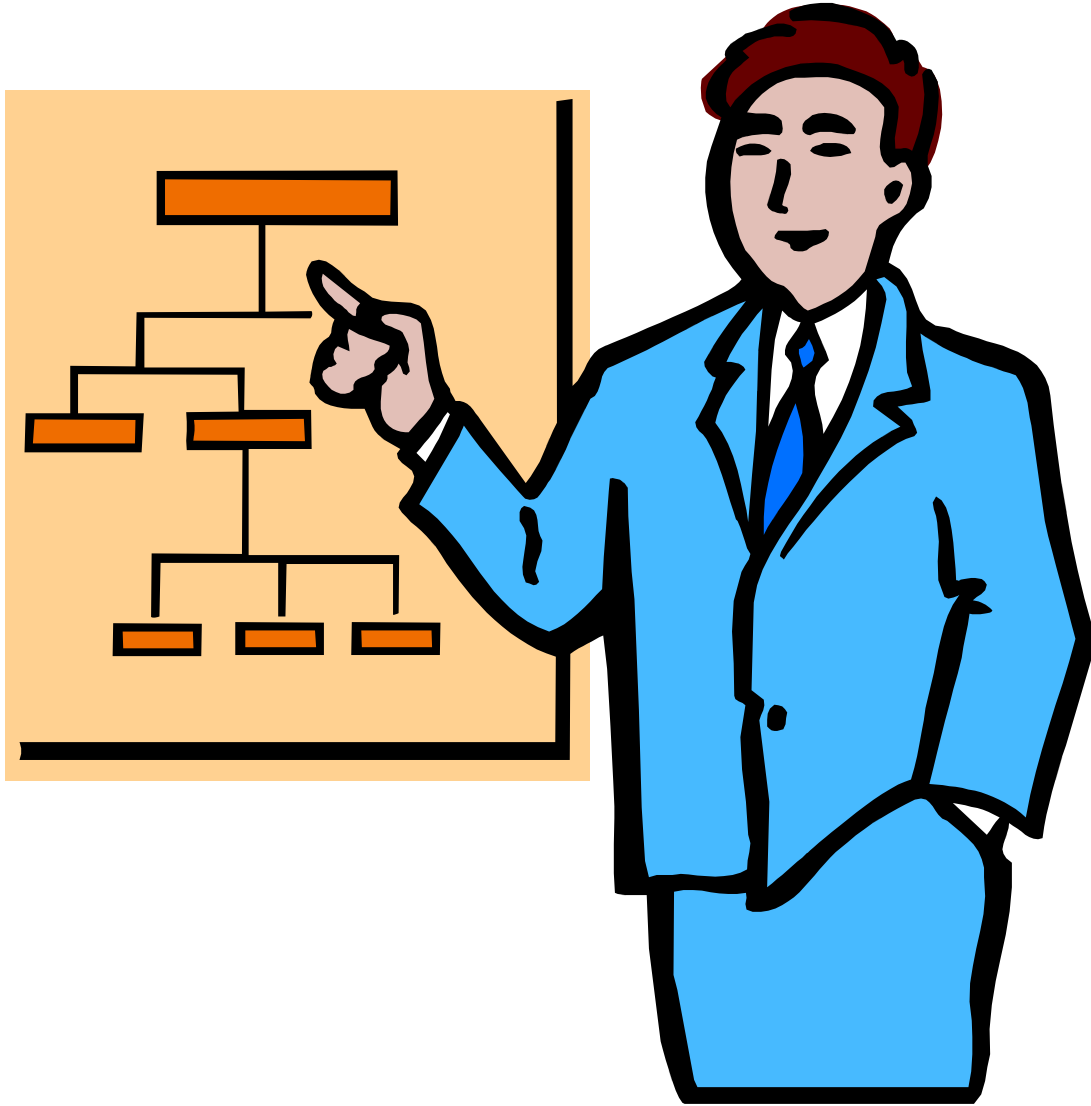
5. State Your Solution

Communicate Clearly

Give Honest Opinion

Appreciate their point of view, but stick to your own

Focus on their agenda



6. Explain the Process

What will happen

The possibilities

The solution

Don't oversell

7. Recommendation

You can help

You can't help

Refer it out



8. Justify and Close and...

Tell the PC you are the right person for the job then let them know....



**WHO'S IN
CHARGE?**



Don't let them
beat you up on
price!



9. Follow-up

Check in with the PC

Agreement must be signed

Decline Letter



10. Start
Working Now



Their choice too!

Contextualized Knowledge

Technologically Competent

Reasonably Accessible

Industry Awareness



Trust is the Key: Listening is the Way

Focus

Hear words and feelings

Restate and validate

Clarify

Reflect and Summarize

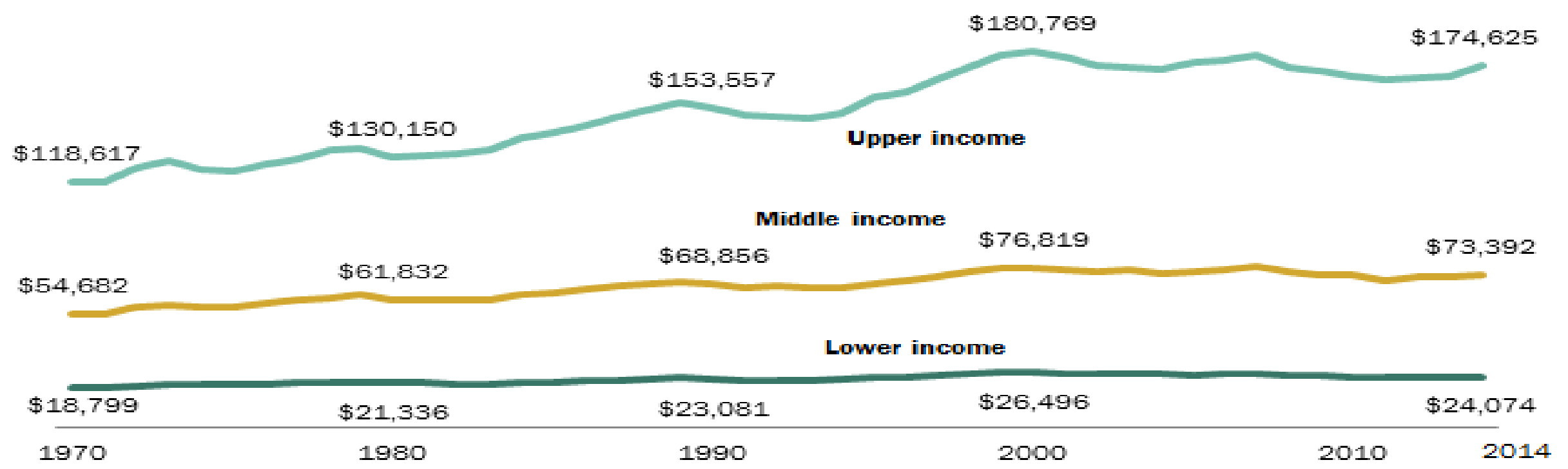
Defer Judgment



But They
Said No???

Median income of upper-income households has risen more than the median income of middle- and lower-income households from 1970 to 2014

In 2014 dollars and scaled to reflect a three-person household



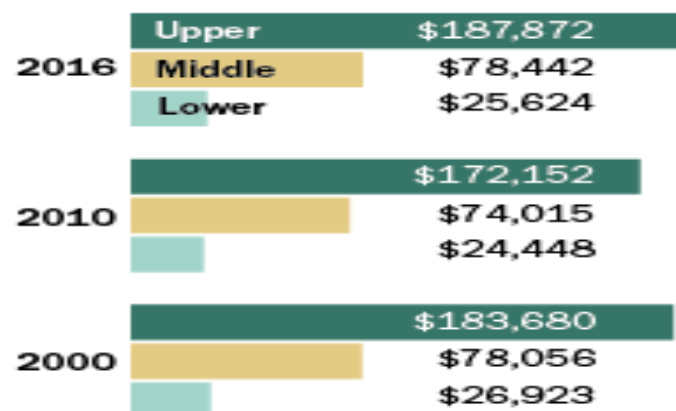
Note: Households are assigned to income tiers based on their size-adjusted income in the calendar year prior to the survey year.

Source: Pew Research Center analysis of the Current Population Survey, Annual Social and Economic Supplements, 1971 to 2015

PEW RESEARCH CENTER

Median income of the middle class in 2016 is about the same as in 2000

Median incomes of households, by income tier, in 2016 dollars and scaled to reflect a three-person household



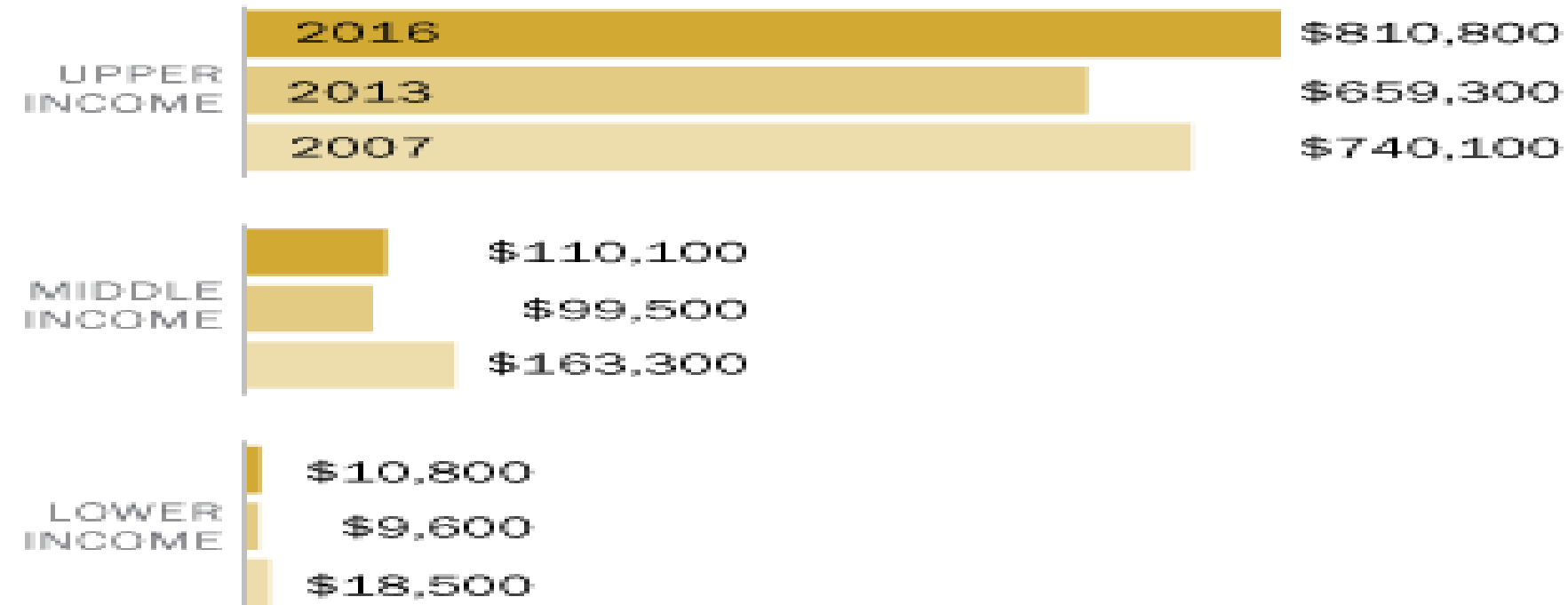
Note: Income data collected in the 2016 American Community Survey pertain to the 2015-16 calendar years. In the 2001 and 2011 Current Population Survey, incomes refer to earnings in the prior calendar year. Incomes are adjusted to 2016 dollars using the CPI-U-RS.

Source: Pew Research Center analysis of 2001 and 2011 Current Population Survey Annual Social and Economic Supplements and 2016 American Community Survey (IPUMS).

PEW RESEARCH CENTER

Only upper-income families have median wealth greater than prior to the Great Recession

Median household net worth by income, in 2016 dollars



Source: Pew Research Center analysis of Survey of Consumer Finances public-use data.

PEW RESEARCH CENTER



You may be the problem!

SHAME SHAME SHAME

How We Drive Clients Away!

Clio 2019 Legal Trends Report Says:

1. We don't tell them what to do next
2. We don't provide transparency with pricing
3. We don't explain the process
4. We don't provide comprehensible information
5. We are not nice!

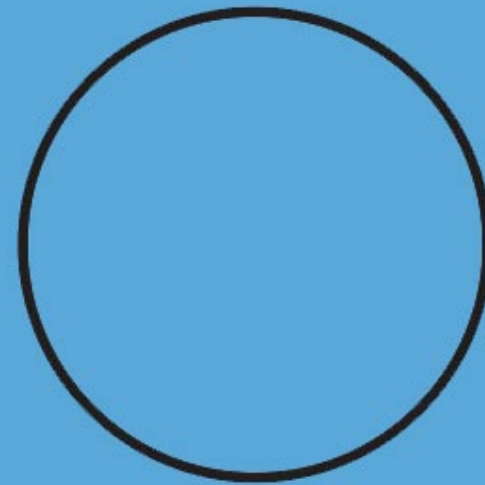
SHAME ON YOU IF YOU DON'T

So, you should....

1. Be competent
2. Help them do their job
3. Just give them the best answer
4. Flat fee or explain process with pricing in mind.
5. Don't over sell, you don't have to be "all that"
6. Respect their time- give them only what they need
7. Adapt and Innovate
8. Ask for feedback
9. Customer Service (outsource happiness!)

Why No?
Don't End Up
Here!

CIRCLE OF TRUST



YOU → •



If they say
YES...



Relationship Management

Listen

Manage Expectations

Initiate Dialog

Initiate Dialogue

1. Interviews

2. Conferences

3. Team interviews

4. Financial planning discussions

5. Ask for Feedback

6. Close Survey

Client Surveys

Request our Consultation Agreement and/ or
Client Satisfaction Survey Form

From PMAS@dcbar.org

Use www.SurveyMonkey.com

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





BUT WAIT!

Who should you avoid?

Serial litigant

Angry

Liar

“Let’s Take ‘em Down!”

Undercutter





Symptoms of a Problem Client

Managing the Difficult Client

1. Special Time
2. Document, Document, Document [LEO 333](#)
3. Set Boundaries- before, during and after
4. Train and Remind



You're Fired!

Rule 1.16(b)

Stop wasting precious time



We Can't Control Everything!

Things you
can't control or
change



But you can...

Things you
can control or
change



Being ***proactive*** means you focus
on things you have control over to
make things better

Getting Clients to Pay

1. Bill regularly
2. Bill after good result
3. Bill after a productive conversation
4. Review billing entries
5. Never delay billing
6. NEVER DELAY BILLING!



LAW FIRM ^{AV}

MARKETING ST

Applicable Rules:

7.1 and 7.5

New Ethics Opinions LEO 370 and
371

Codes, regulations & other
jurisdictions can also apply.

Example:

Bergman v District of Columbia

DC Court of Appeals 08-CV-859



Marketing

The history.

Herd mentality.

Figuring out what works for you.

BE YOU

Marketing

Your Entrepreneur Hat

Change the approach

Think Differently

Know your client





Remember the Plan: Business Plan will

Discern your purpose

Refine your message

Locate the target

Avoid overloading the message

Give them the right message

Follow-up

Connect with clients

Questions during intake you can ask to learn
about your client's
Problem Recognition Process

Potential
Client's Problem
Recognition
Process

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 MESSAGE

Talk about you

Or

The problems you solve

Your Choice

Avoid the Three **Deadly** Marketing Message Sins

- 1 **FEATURE** ~~your company~~ ^{the customer}
- 2 **FOCUS ON** ~~brand position~~ ^{customer message}
- 3 **CREATE** ~~content~~ ^{a distinct point of view}

Stand Out

1. Determine your Target Market
2. Find the Problems of your Target Market
3. Solve Your Target Market's Problem
4. Build Credibility Among your Target Market

Science of Persuasion

<https://youtu.be/cFdCzN7RYbw>



01

Prepare information (about 5-10 questions you get often from clients

02

Prepare a 15-30 minute talk for a room full of your potential ideal clients

03

You should be informing and educating on the problems you solve

Develop the Message

Which is
more effective?

Juvenile Defense

Experienced Former Prosecutor

**Now focused on the problems of juvenile
defendants.**

Thomas Wright, Esq

123 Sesame Street

Washington, DC 21115

www.websitehere.com

A close-up photograph of a person's hands behind their head. The person is wearing a dark blue shirt and has their hands cuffed behind their head with metal handcuffs. The background is dark and out of focus.

This is Serious

No one thinks their child will
end up here

For HELP when the unthinkable
happens call

Thomas Wright

Attorney at Law

555-555-1212

Ask yourself...

Do your readers (of your marketing material, newsletter, website, book) see themselves in what you write,

Or is your writing all about you?

“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

Information vs. Legal Advice

Miranda Example:

You have the right to remain silent

Vs.

Never talk to the police

Marketing

All marketing works - some just better than others

80% of new business comes from 20% of your existing clients. How do you get more 20% clients?

Jump start marketing (handout)

ENGAGE

What does *process focused*
Marketing do?

Some examples of process focused sites:

www.virginiadivorceattorney.com

www.rosen.com

www.jerseyestateplanning.com

www.bobbattlelaw.com

www.oginski-law.com

www.paestateplanners.com

How do I get a Divorce in North Carolina?



ABSOLUTE DIVORCE



CHILD SUPPORT



CHILD CUSTODY



PROPERTY DIVISION



ALIMONY



DOMESTIC VIOLENCE



MEDIATION



DIVORCE & TAXES



RETIREMENT



ENTREPRENEURS



SPOUSAL SPYING



LAWYER LOCATOR



Get answers at the webinar

The Divorce Legal Webinar will teach you how to prepare for the topics you will face in divorce,



Free attorney advice

Get answers from Rosen Law Firm attorneys and members of North Carolina's largest



<https://vimeo.com/168929480>



Marketing focused on
"me"

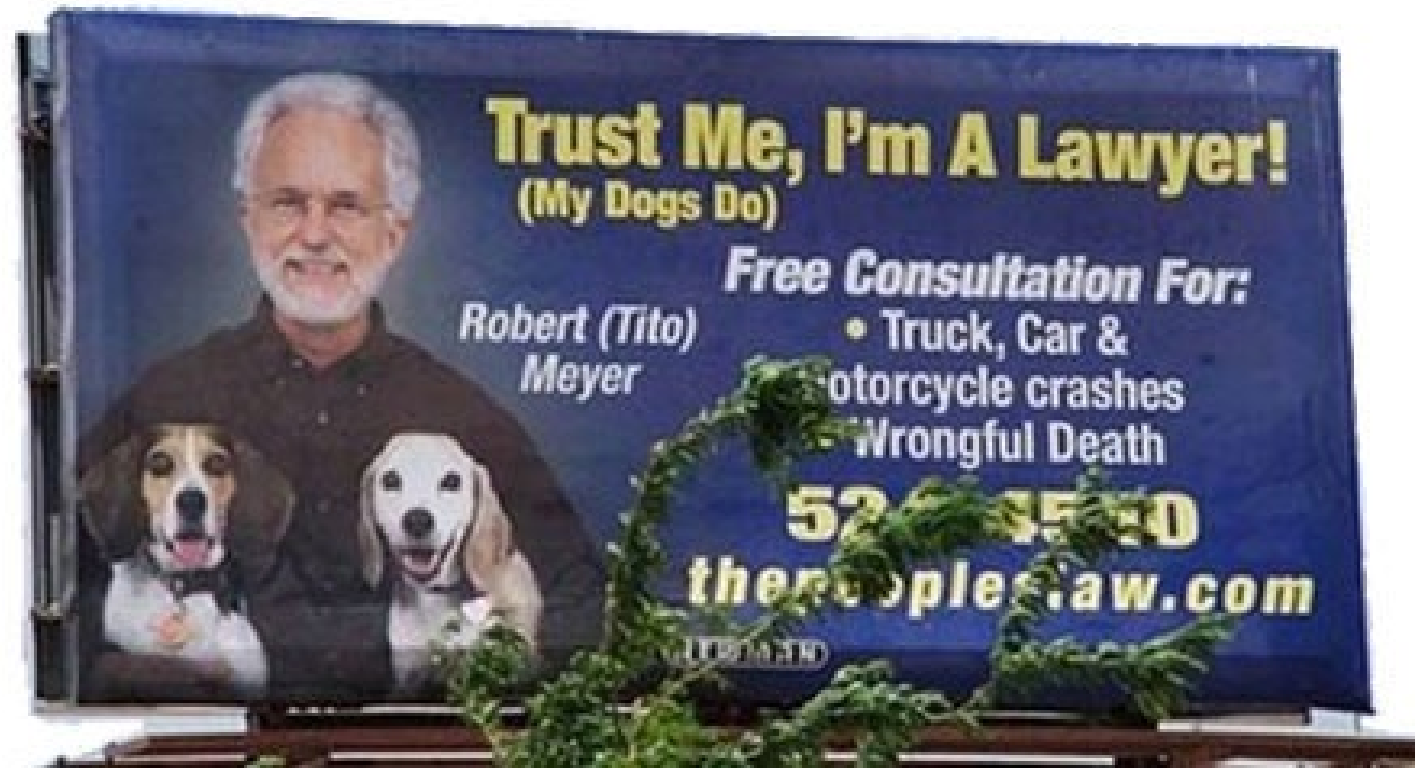
Tax, Business Law, Business Formation and Finance, Computer/High Tech/Biotech Law, Intellectual Property, Trusts, Estates, Wills, Probate, Estate Planning, Real Estate, Civil Litigation, Mediation.

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



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(My Dogs Do)

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- Wrongful Death

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- * Serious felonies
- * Post conviction relief
- * Probation & Parole revocations
- * Expungements * Bond reductions
- * All Federal & State Courts

No Evidence

No Conviction!

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advertisement

Peter "P" Ta Mon John: Trial Lawyers



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**Robert
SPEER**

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themagiclawyer.com



MAYBE THIS
INSTEAD

Process Focused Marketing

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

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WWW.LEELAWYERS.COM

Process Focused Marketing

Reason #5 To Name **Guardians** For Your Kids

Your mother-in-law, Barbara

- Offers you lots of free parenting advice
- Thinks the answer to all baby problems is “more solid foods”
- Most important values are family and carpeting
- Believes in “spare the rod, spoil the child”
- Would do a much better job than you if given the chance.



Are you sure the court won't assign guardianship of your children to *her*?

Call Today For Your **Free Parent's Protection Planning Guide**: (415)451-0123 or visit www.TheaLaw.com



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Larkspur, CA 94939
Tel: (415) 451-0123
Fax (415) 451-7644
www.TheaLaw.com



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(706) 543-0002***

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The two inch
poison dart frog
may be small but
is
one of the
deadliest animals
on earth with
enough
poison to kill ten
grown men.



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Who lawyers say is their Competition:

67% - other law firms of similar size

49% say significantly larger firms

13% pro se

11% do-it-yourself legal websites

Where do you market?

How many different ways could someone who needs to know what you know find you?

How hard are you making it for your best client to find you?

You & your presence



```
graph TD; A[You & your presence] --> B[Your office]; B --> C[Business card]; C --> D[Website (video)]; D --> E[Newsletter];
```

Your office

Business card

Website (video)

Newsletter

Marketing
Opportunities

01

Blog

02

Brochure

03

Social media

04

Speaking
engagements

05

Books/ free
publications

More Marketing Opportunities

Elevate Your Practice

Lexicata is the **law firm CRM & client intake software** that helps improve organization, maximize efficiency, and drive more revenue.

[Get Started](#)

Now merged - Clio Grow

Don't get Comfortable!

How you treat your best client:

- You would have a plan
- You would strategize
- You would prioritize
- You would work on it regularly
- You would evaluate it often

Remember

The best advertising for your law firm will come from a happy client

Make your client's case your case...make it personal.



Business Cards

The Website

Website



Must have website

You can do the work yourself:

- <http://rollinsandchan.com/>
- www.weebly.com
- www.wix.com
- www.wordpress.com
- www.directlaw.com

Use a Service

- www.networksolutions.com
- <http://www.rocketx1.com>
- www.web.com
- <https://www.godaddy.com/websites/web-design>
- www.top10webbuilders.com

Unique, relevant content

Link equity

An old domain name

SEO

D.C. Metro Crash - who is first in Google?

Search living trust or I need a will

Marketing:
Website



Marketing: Mobile Website

Mobile website? www.dudamobile.com

Thumb-friendly design;

Create for visibility & simplicity;

Click-to-dial phone number;

No more than 7 main navigation buttons



Before



After

Marketing

Don't be clever . . .

But invisible, like . . .

www.sankel.com



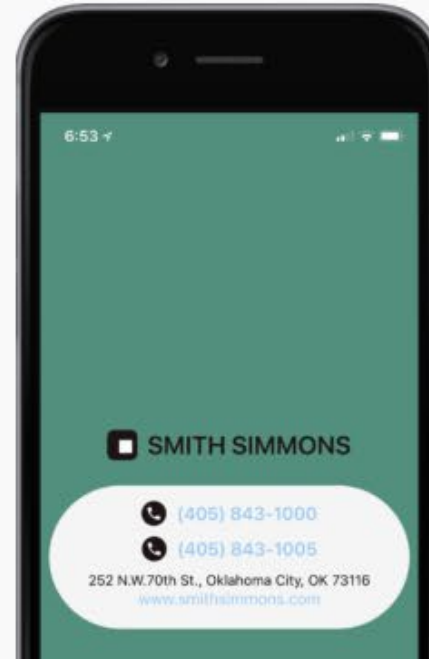
Marketing: Internet

Use Free Listings:

Google, Yahoo, Bing, MSN,
AOL, Yellowpages, Yellowbook
and more....

[Home](#)[Explore](#)[Pricing](#)[FAQ](#)[Blog](#)[Contact](#)[Admin Login](#)

The app your clients have been asking for.



Yourfirmapp.com

Newsletter

1. Talk about ideal clients problem



2. Directed to the potential client



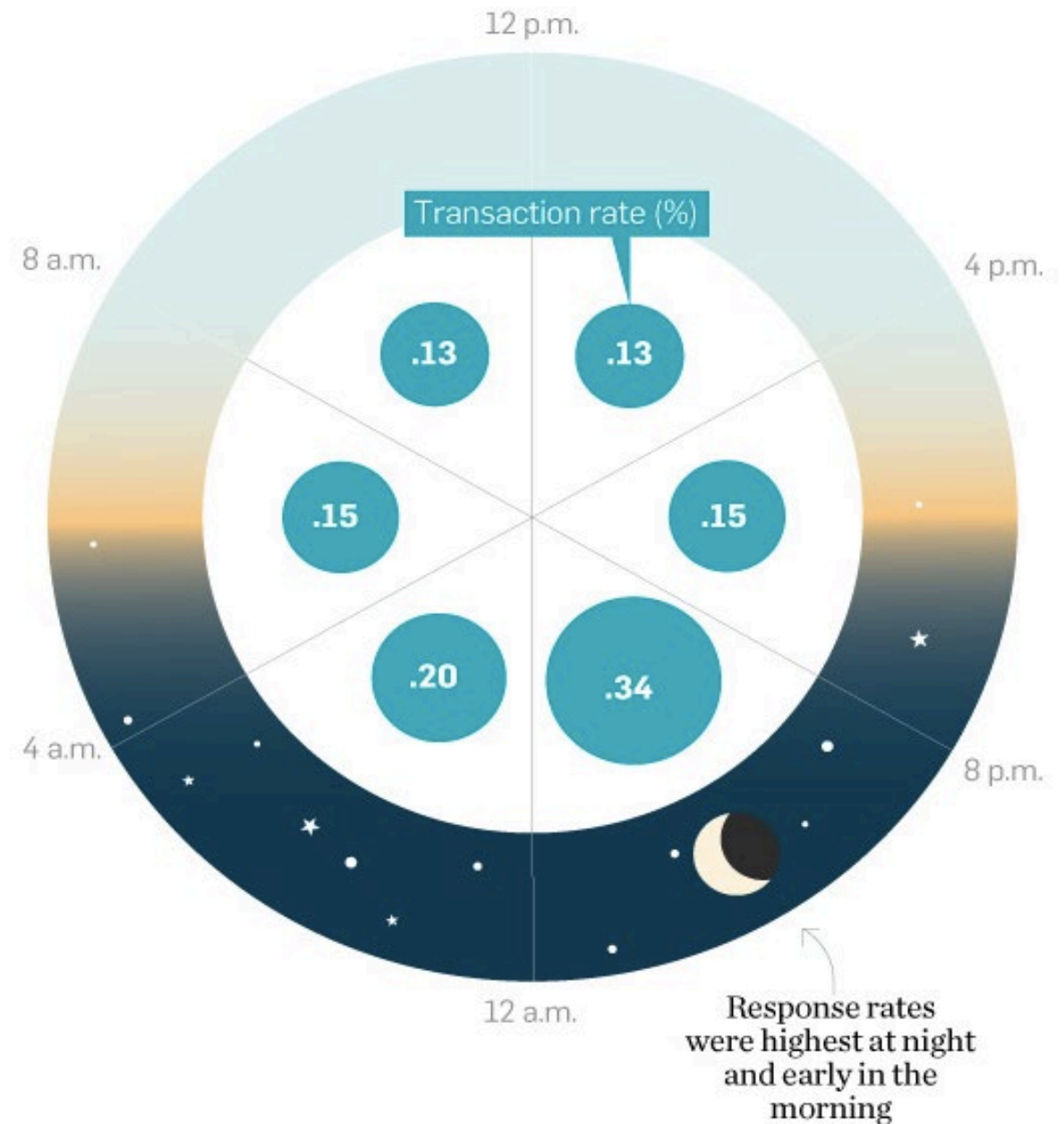
3. Your solution reaches the problem

Newsletter-Timing

What is the best day of the week to send an electronic newsletter?

Conventional wisdom - Tuesday night;

New approach - Saturday night. Why?





MailChimp



Marketing Tools

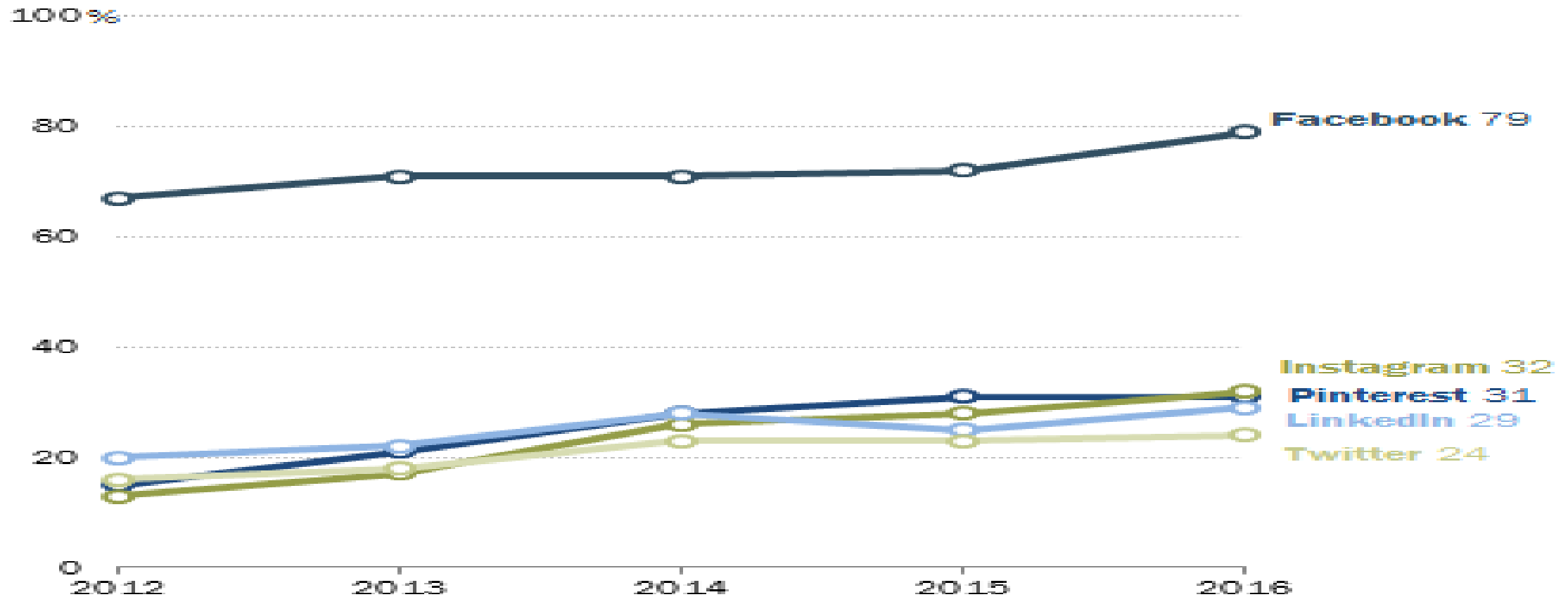
Customer Relationship Management

keap



Facebook remains the most popular social media platform

% of online adults who use ...

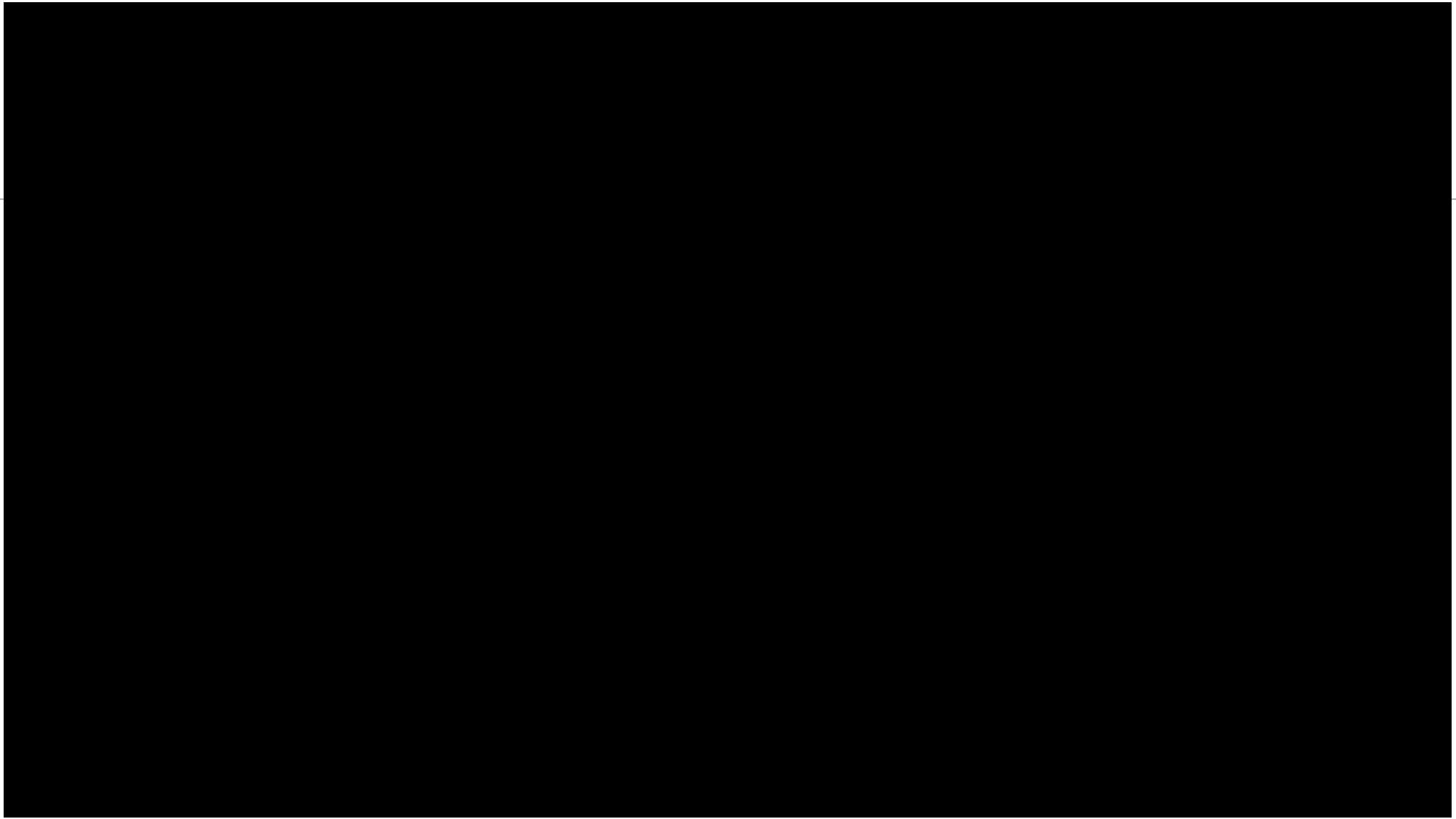


Note: 86% of Americans are currently internet users
Source: Survey conducted March 7-April 4, 2016.
"Social Media Update 2016"

PEW RESEARCH CENTER

Worst Lawyer Video

Lawyers and
Video:
Thoughts?



Video Marketing

www.pixability.com

www.fairfaxvideostudio.com

www.oginski-law.com

www.crispvideo.com

Lawyer Video Examples

How to apply for a work visa:

<http://www.youtube.com/watch?v=sUWG2MJWJ0A&feature=fvsr>

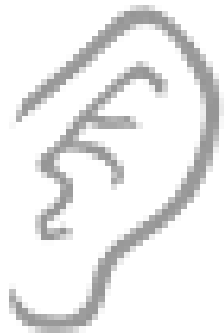
How do I file bankruptcy:

<http://www.youtube.com/watch?v=aHAycjvMM>

How to file a legal separation:

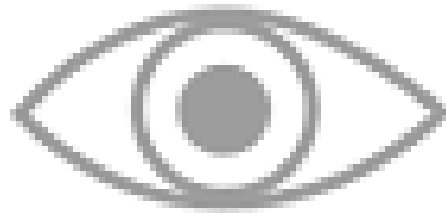
<http://www.youtube.com/watch?v=oi-y9s4OhEo>

Think about it. **People remember...**



20%

20% of what they hear



30%

30% of what they see



70%

An amazing 70% of
what they see & hear!

Create a great logo



<http://99designs.com/logo-design>

priced packages will attract more experienced designers and offer you more support.

	Bronze	Silver	Gold	Platinum
	US\$299	US\$499	US\$899	US\$1,299
Design concepts (approx.)	30	60	90	60
100% money-back guarantee	✓	✓	✓	✓
Full copyright ownership	✓	✓	✓	✓
Mid & Top Level designers only	—	—	✓	—
Top Level designers only	—	—	—	✓
Dedicated manager	—	—	—	✓
Prioritized support	—	—	—	✓

A FEW FINAL WORDS

Self-discipline is the ability to make yourself do what you should do, when you should do it, whether you feel like it or not.




One Practice Area

High quality work product

Be the expert

To Make It
Work

Build Your Network



who's in your network?

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Network

Build a system for
engaging

Create and Feed your
network

Follow up

Be Bold....

Follow the rules

But don't be
paralyzed by
your lawyer
brain.

Networking Opportunities

Friday, January 31, Noon Barrel & Crow, 4867 Cordell Ave.,
Bethesda, MD (Bethesda Metro) RSVP to
rsjillions@gmail.com

Friday, February 13, 12:30 p.m. Alto Fumo, 2909 Wilson
Boulevard, Arlington, VA (Clarendon Metro) RSVP to
steven@stevenkriegerlaw.com



Rochelle D. Washington

D.C. Bar Practice Management Advisory Service

901 4th Street

Washington, DC 20001

202-780-2764

rwashington@dcbar.org

THANK YOU!

More 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
([Request the book - it's free](#))

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