

**Successful Small Firm  
Practice Course**

**District of Columbia Bar**

**October 3, 2020**

# Confidential Survey

Rule 1.6(j) applies

Tell us about you and what you need to be successful.

[Course Supplement Website](#)

**Why this Course is  
necessary.**

**What is it that we do?**

**We are licensed to solve the problems  
of others.**

**In a unique context . . .**

**We are regulated**

**DC Rules of Professional Conduct**

# Where does ODC spend its time?

Chart V - Type of Practice

Type of Practice	2019	%	2018	%	2017	%	2016	%	2015	%
Solo/Small Firm	110	47%	139	47%	119	40%	155	45%	139	48%
Firm	92	39%	119	40%	130	44%	151	44%	114	39%
In House	15	6.4%	8	3%	8	2.7%	7	2%	9	3.1%
Other	8	3.4%	10	3.4%	15	5.1%	11	3.2%	13	4.5%
Government	6	3%	11	4%	16	5%	17	5%	8	3%
Public Interest	5	2%	7	2.4%	9	3%	6	1.7%	7	2%

Historically, 40% to nearly 50% of Disciplinary Counsel's investigations are of small firms.

**We do this for money**

**The elusive profit**

***The 1958 Lawyer and his 1938 Dollar***

**We were not always tied to the  
billable hour**

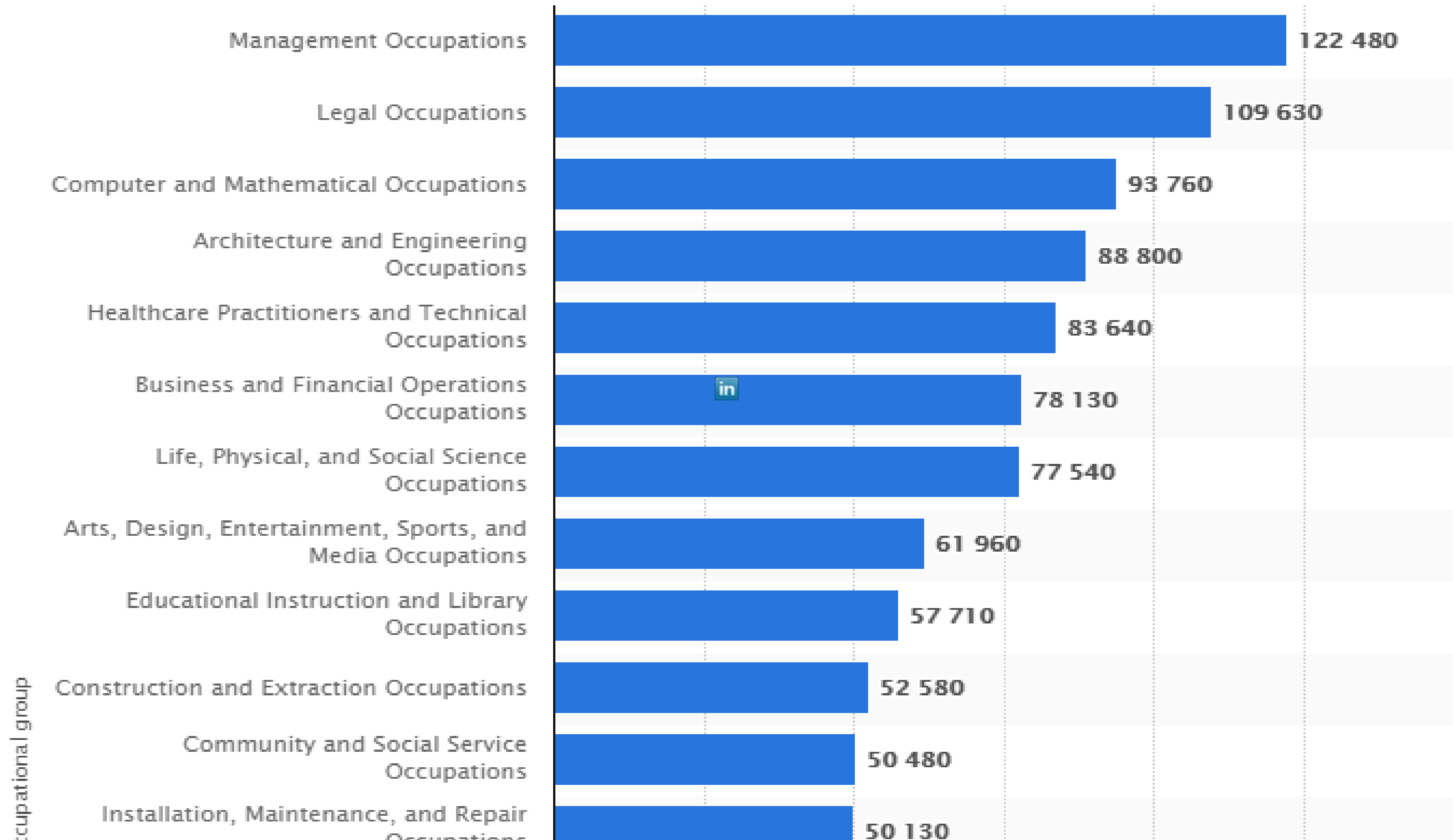
# The 100 best paying jobs in 2020

#50 Lawyer

Median salary: \$120,910

Stress level: High





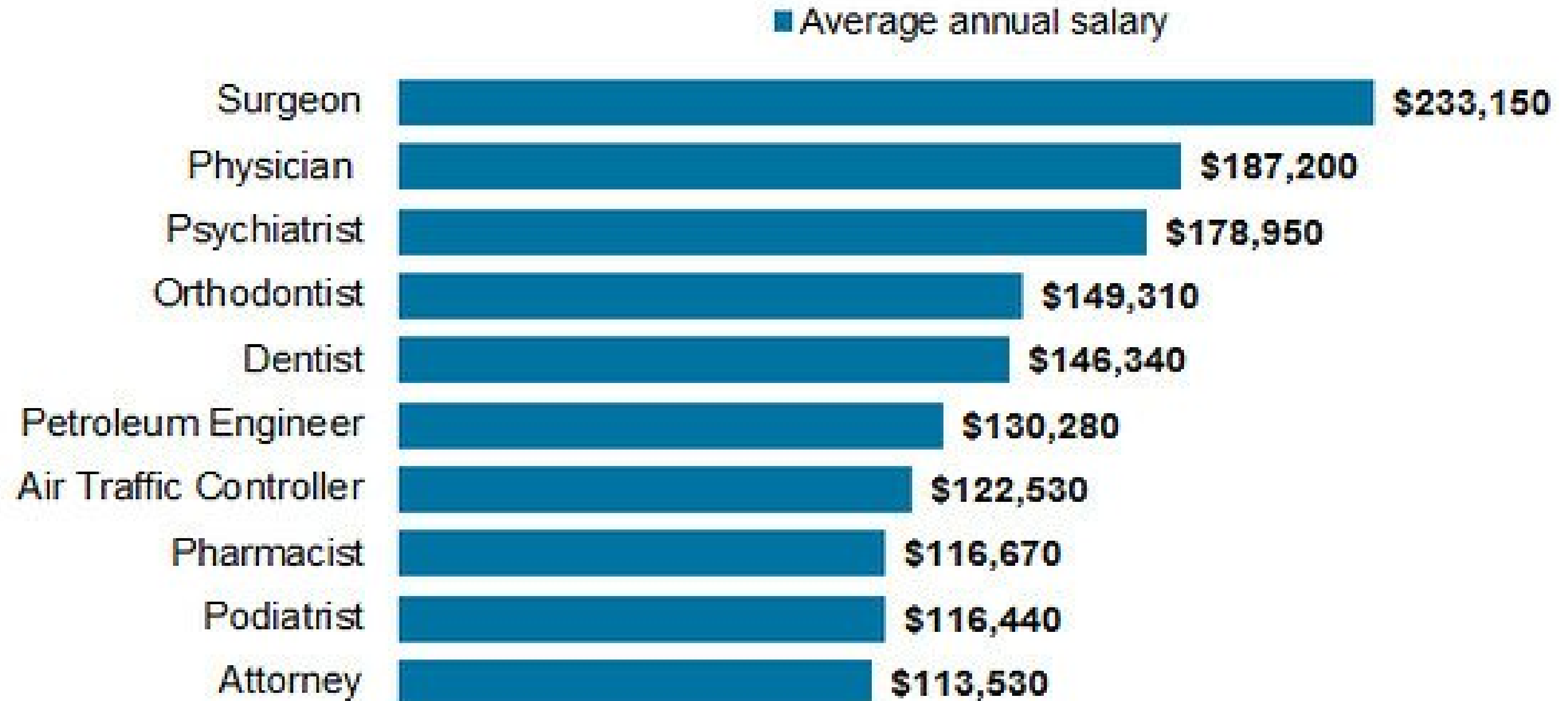
The mean salary for lawyers in DC is the  
highest in the country

**D.C.     \$192,530    (2020)**

# Six years ago . . .

## The 10 Best-Paying Jobs of 2014

Health-care jobs that require advanced degrees dominate the list.



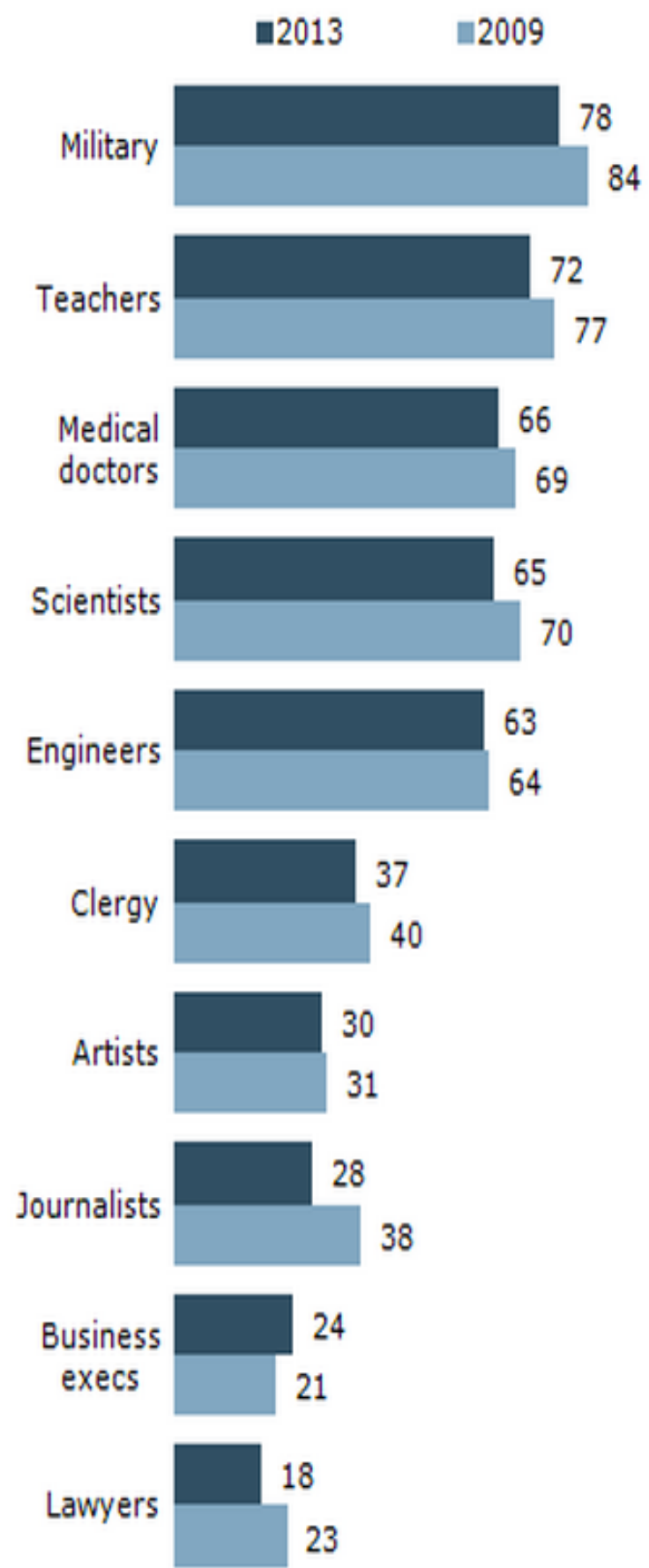
**And the public has an  
attitude about us**

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]?

	<b>Very high</b>	<b>High</b>	<b>Average</b>	<b>Low</b>	<b>Very low</b>	<b>No opinion</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Nurses	31	54	14	*	1	*
Engineers	17	49	31	2	1	1
Medical doctors	20	45	28	4	2	*
Pharmacists	15	49	28	5	3	*
Dentists	13	48	33	4	2	*
Police officers	17	37	31	9	5	*
College teachers	12	37	34	10	7	1
Psychiatrists	10	33	43	10	2	2
Chiropractors	6	35	47	9	2	1
Clergy	10	30	42	10	5	4
Journalists	5	23	34	20	17	1
Bankers	3	25	52	15	5	*
Labor union leaders	4	20	48	20	7	1
Lawyers	4	18	49	19	9	*
Business executives	2	18	50	22	8	1
State governors	4	16	52	21	6	*
Stockbrokers	2	12	55	22	8	2
Advertising practitioners	2	11	44	30	10	2
Insurance salespeople	2	11	52	26	9	*
Senators	2	11	42	32	13	1
Members of Congress	3	9	33	34	21	1
Car salespeople	1	8	47	30	13	*

## Trend in Perceived Contribution

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



# Where we rank higher

Lawyers are generally in the top ten percent for suicide and depression

Lawyers frequently struggle with alcohol abuse, depression & anxiety.

# The goal of this Course

To create a law firm where you are:

solving problems you love to solve;

remaining always ethical; and,

making a profit without burnout.



Selecting the  
problems to  
solve

Where is your passion and competence?

# How to choose the problems you will solve

What do I know how to do?

In what am I most expert?

Where is my best market?

Who is the lawyer within?

**Play to your strengths**

<https://www.gallupstrengthscenter.com/>

<http://www.viacharacter.org/www/>

<https://www.authentic happiness.sas.upenn.edu/>

The internal  
determines  
the external

# Focusing narrowly on what you love

Makes it easier to establish expertise

Makes it easier to know your ideal client

Makes it easier to know your value to your ideal  
client

**The path to a successful  
firm starts with:**

**A concept map**

**and**

**a business plan**

# The concept map

A visual thinking tool to -

Analyze

Organize

Understand

Remember

**It's power is in  
its simplicity**

**It works like your brain works.**



# Use it for -

Note taking  
Brainstorming  
Problem solving  
Studying  
Memorization  
Planning  
Researching  
Presenting  
Figuring things out

**Start in the  
middle of a  
blank page**

**Develop subtopics all  
around the central  
topic**

Examples using

Mindmeister

Simple Mind

# Law Firm Business Plan

## Executive Summary

Write it last

## Firm Description

- Mission Statement - 30 words or less
- Goals & Objectives
- Philosophy
- Your Ideal Client
- Specific problem solving
- Your value
- Entity

## Operational Plan

- How & where
- Office issues
- Staff issues
- Equipment
- Legal issues
- Vendors
- Money management
- Office management
- Startup expenses

## Marketing Plan

- Market research
- Target market
- Ideal client's problem recognition process
- Marketing initiatives
- Marketing tools

## Services offered

- Competition issues
- Fee structure



What if you had to explain the Metro system?

# Concept mapping resources

[The Mindmap Blog](#)

[YouTube Example](#)

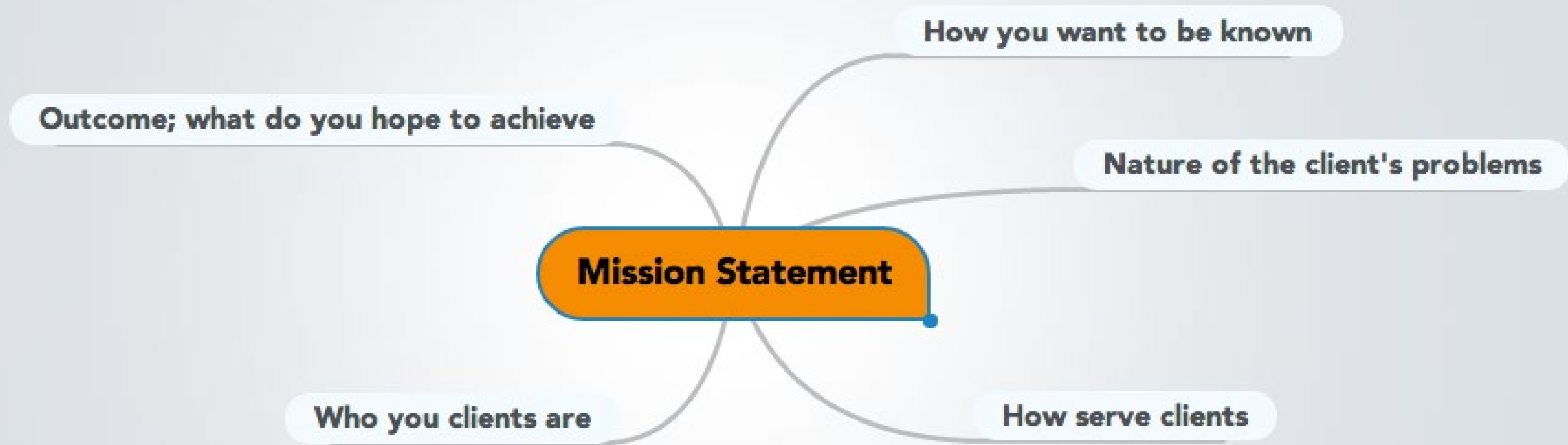
[The theory underlying concept mapping](#)

# The law firm business plan & workbook

A good place to start is with the Mission  
Statement

A short statement - 30 words or less -  
explaining your reason for being





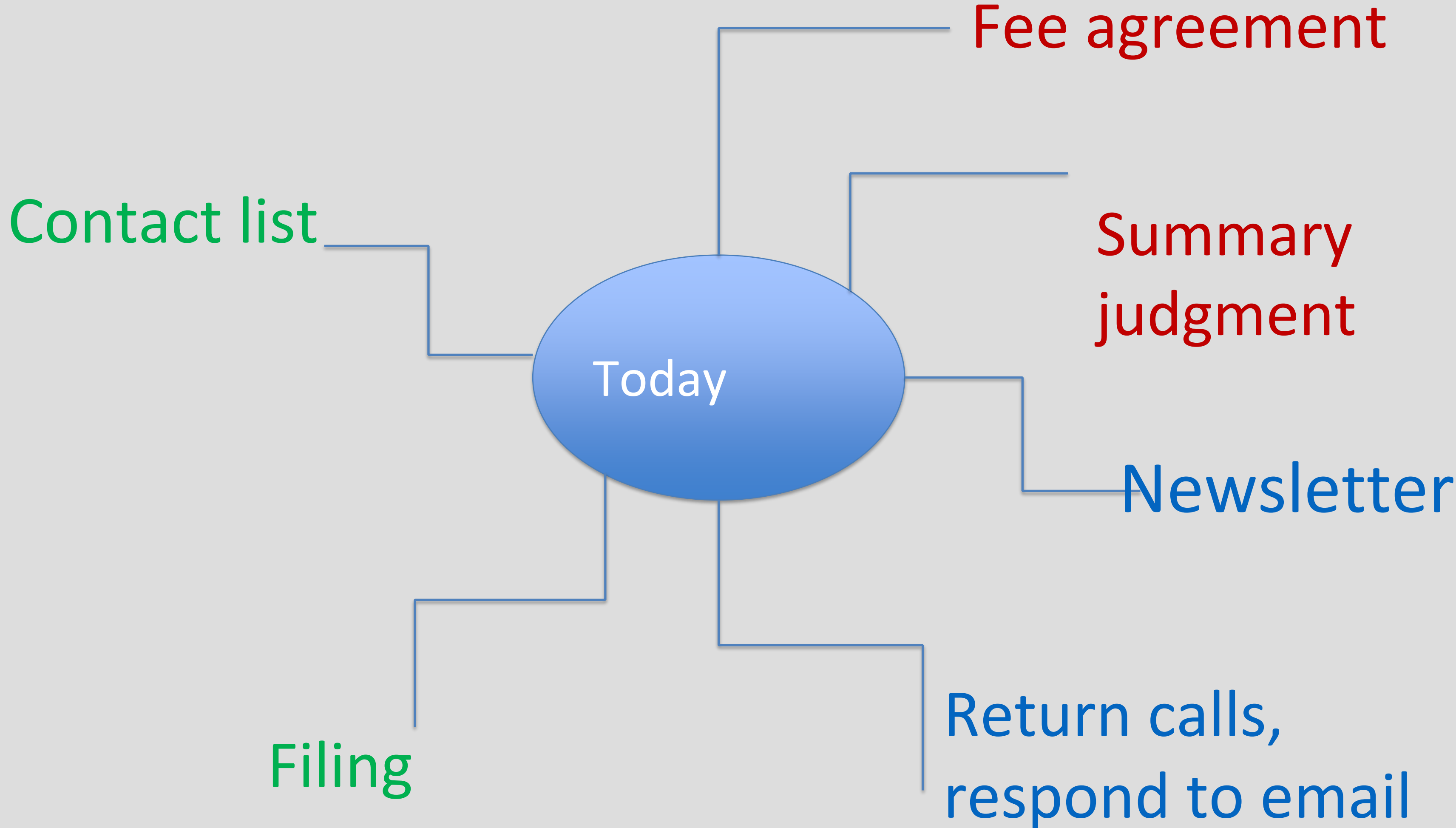
Preparing the Mission Statement

Google "law firm mission statement" for examples

Make yours unique and relevant.

# Mapping for time management

Start your day with a concept map



Contact list

Filing

Today

Fee agreement

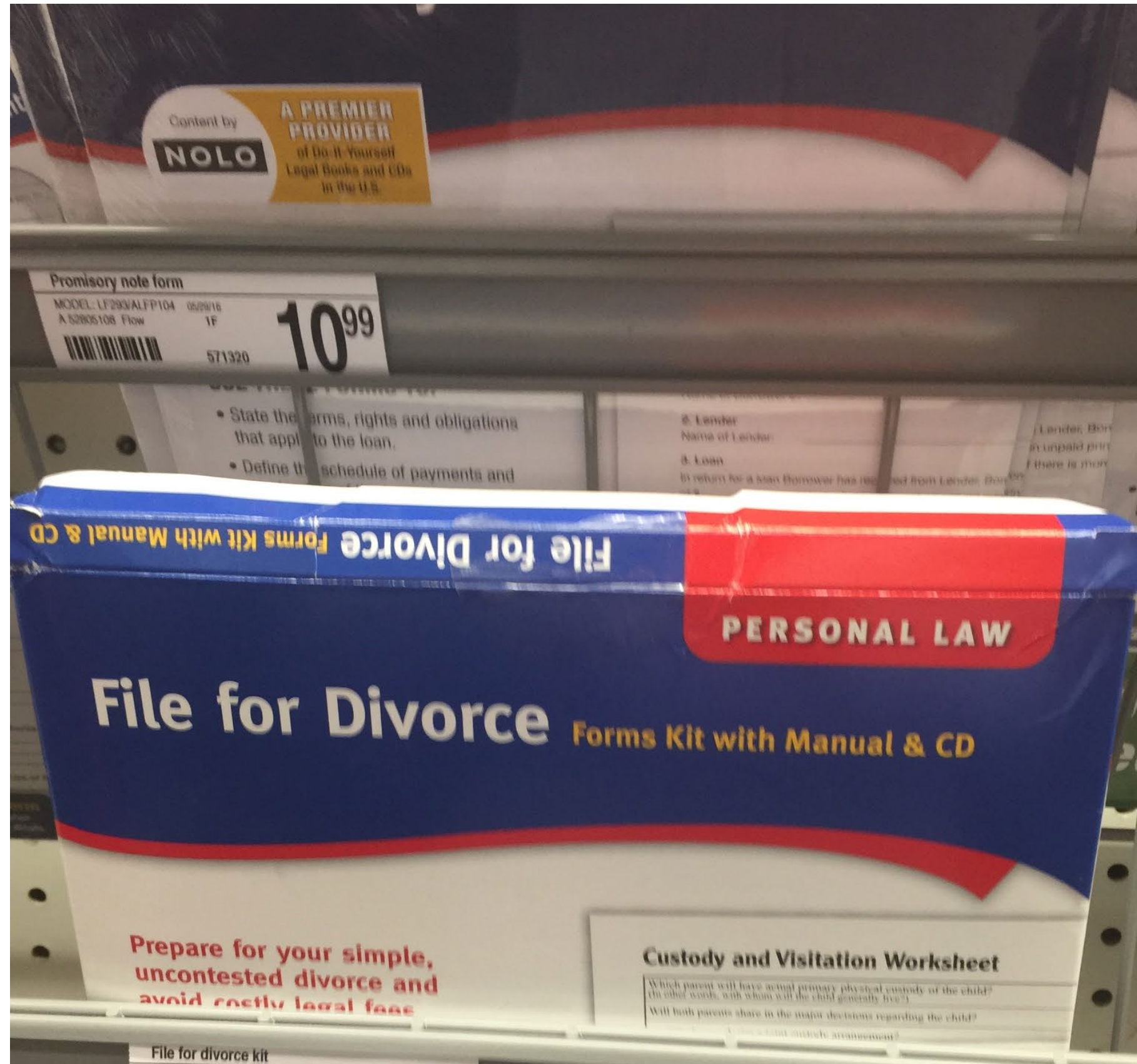
Summary judgment

Newsletter

Return calls, respond to email

**Are you an entrepreneur  
who happens to be a  
lawyer,  
or  
a lawyer who has  
shutdown entrepreneurial  
instincts**

How do you respond to the prospective client who shows up with this?



How will you respond when hello divorce arrives?

## Membership Options

serving California & Colorado

No court battles, lawyers or hidden fees *Better Value!*

Installment



One Payment



Get a 7 day trial of the DIY and DIY Pro plans with  
coupon code 7DAYSFREE

MOST POPULAR



DIY DIVORCE

**\$99** / month



DIY PRO

**\$199** / month

DIVORCE PLUS

**\$2 500**

DIVORCE WITH BENEFITS

**\$3 000**

**When your only tool is a**

**hammer,**

**everything looks like a**

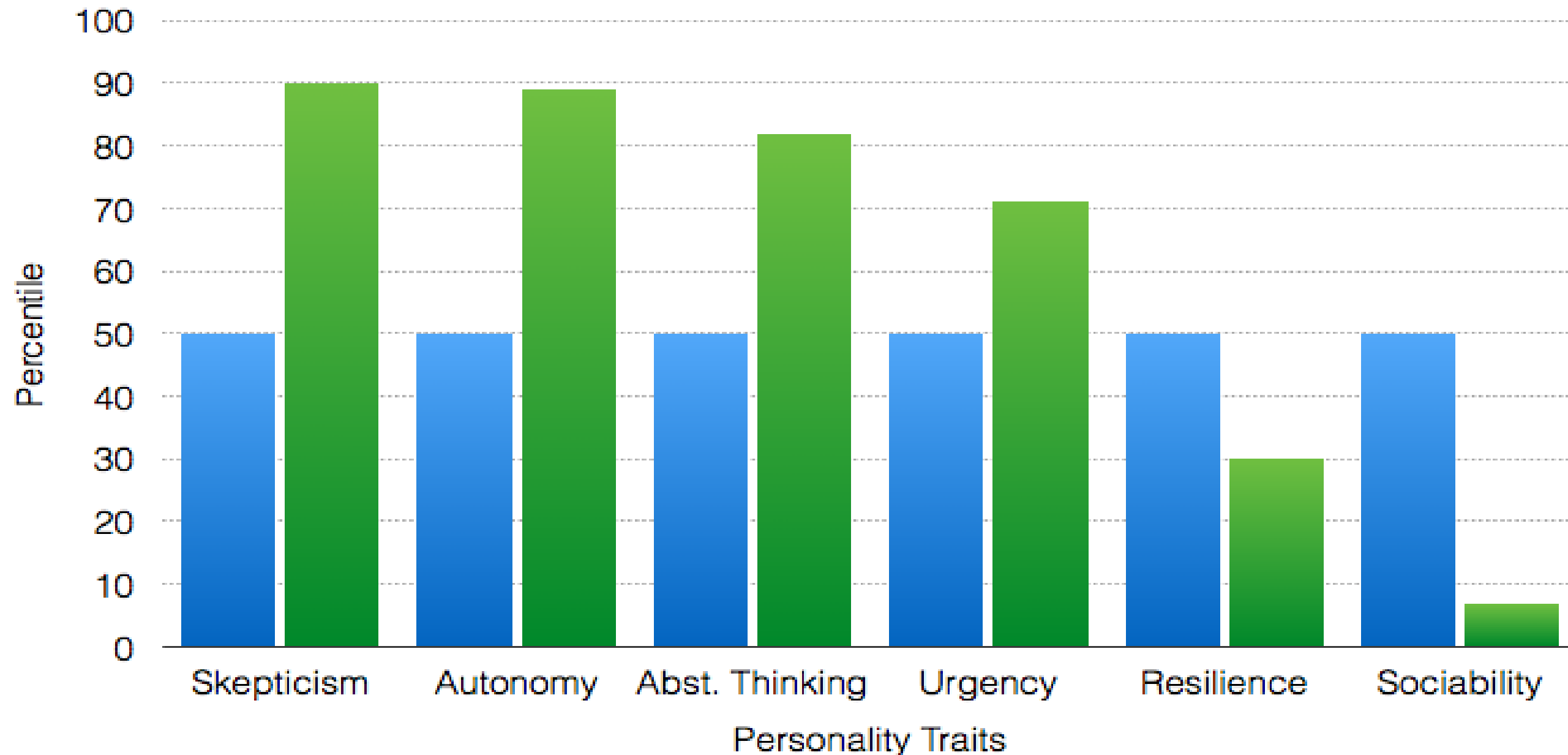
**nail**



How we are taught to think and how we  
work,  
our fire-walling mindset,  
does not serve us  
in growing our firm

To grow the firm one  
must be  
pathologically  
optimistic

# The 6 Predominant Lawyer Personality Traits



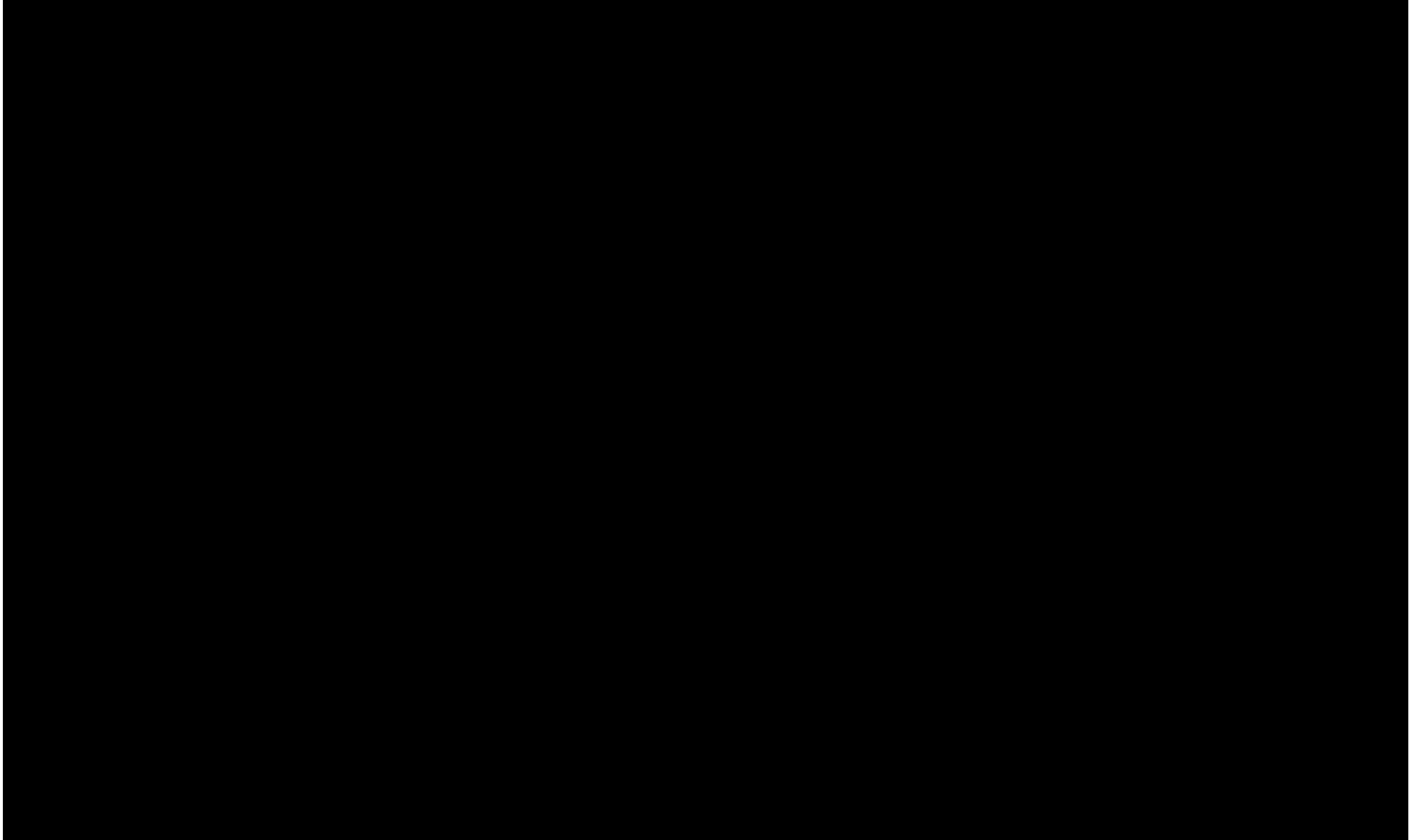
■ General Public (50th Percentile)  
■ Lawyers

From the research of Larry Richard, Ph.D.

New, different tools are  
needed

Start with this truth:

**We act according to our  
self image**



# The situation:

- We don't know what we are doing
- We've never done it before
- We have no clients
- We are not sure how to get clients
- We have very limited funds
- We want to start a law firm

# The resilience issue

Is the situation a threat  
or challenge?

To grow resilience, find  
your purpose and nurture  
your network.

**The entrepreneur-lawyer  
sees opportunity and  
begins to plan**



# Planning

**What does it look like?**

**Brain storming**

**Imagining**

**Talking**

**Writing**

**Fact gathering**

**Relationship building**

**Finding mentors & guides**

**Creating a network**

# Why plan?

It's essential for success

It can protect you from the fire-  
walling mindset

It will give you a distinct  
advantage over the competition

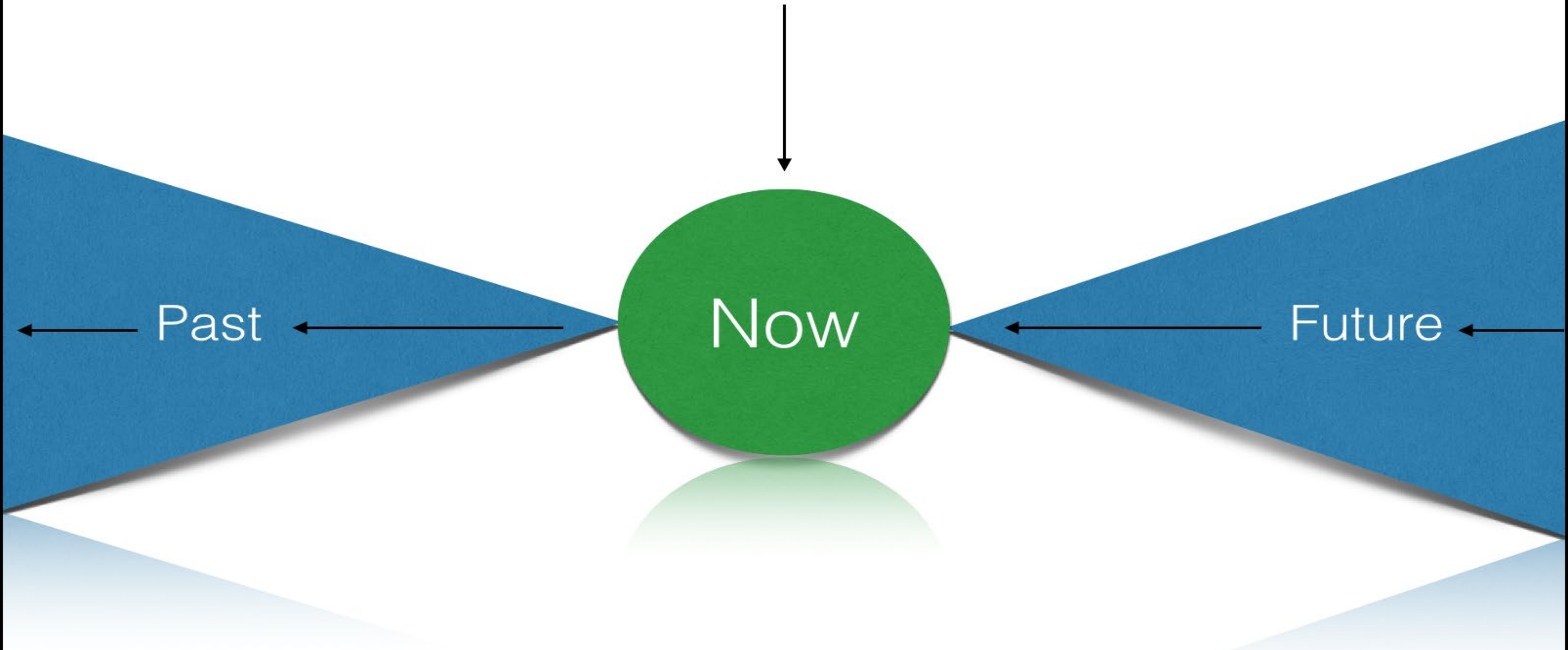
**Planning is a gerund  
(a noun derived from a verb).**

**Planning is an action, not  
an end in itself.**

**The plan does not have to be  
perfect.**

The entrepreneur-lawyer  
plans but also  
understands the power of  
*now*

The only moment for action or omission



How do you plan?

**Pay a visit to your self-image**

**Get permission to plan**

**Form the intention**

**Visualize it**

**Concept map it**

**Work the template**

**Test drive it**



**The goal -**

**actualization**

**not perfection**

Planning for profit

**Know your break-even point**

**Know the cost of problem solving**

**Know the value of a productive hour**

The value of a  
productive hour  
is the cost of compensated  
problem solving needed to  
survive

The calculation:

- Total revenue needed to cover professional & personal expenses
- Divided by 50 weeks
- Divided by five days
- Divided by the average number of productive hours in a day

$$E/50/5/3 = PH$$

You may average two to  
three productive hours a day  
for this & other reasons

\$200,000 in annual expense

- \$200,000 divided by 50 = \$4,000 a week
- \$4,000 divided by five = \$800 a day
- \$800 divided by three = \$266.67

The cost of problem solving is  
\$266.67 for this law firm.

Billing and collecting at \$300 an  
hour generates \$25,000 profit.

\$200,000 in annual expense

- \$200,000 divided by 50 = \$4,000 a week
- \$4,000 divided by five = \$800 a day
- \$800 divided by **four** = \$200

The cost of problem solving is now  
\$200 for this law firm.

Billing and collecting at \$300 an  
hour generates **\$100,000 profit.**

**Break-even: at what point do you become profitable?**

- Determine your total fixed costs (the costs that don't vary with revenue);
- Divide total fixed cost by the difference between your matter price and its cost (margin/profit);
- That tells you the number of matters needed to break-even.



# Break-even calculation:

- Your firm has \$5,000.00 in monthly fixed costs;
- You charge \$1,000 for each matter;
- Each matter costs you \$750;
- $\$5,000$  divided by  $\$250 = 20$  matters each month to break-even

# Break-even calculation:

- Your firm has \$10,000.00 in monthly fixed costs;
- You charge \$5,000 for each matter;
- Each matter costs you \$1,500;
- $\$10,000$  divided by  $\$3,500 = 2.85$  matters each month to break-even.

The lower the overhead,  
the higher the margin,  
the more quickly you  
show profit

Collected fees determine  
profit.

For the client, fees are  
driven by emotion & value

**When is a prospective  
client's need for your  
problem solving at its  
peak?**

**Why is this important?**

Planning for the  
problem solving

Answer the who, what, when, where  
why & how of the problem

Learning your client's cycle: the  
problem recognition process

# Planning for the problem solving

How does your client experience the problem  
solving?

Does your client see your work?

What does the solution  
look & feel like?

**Why does a client chose you?**

**Price?**

**Value?**

**Location?**



# Characteristics of the entrepreneurial small firm

Steps back & strategizes

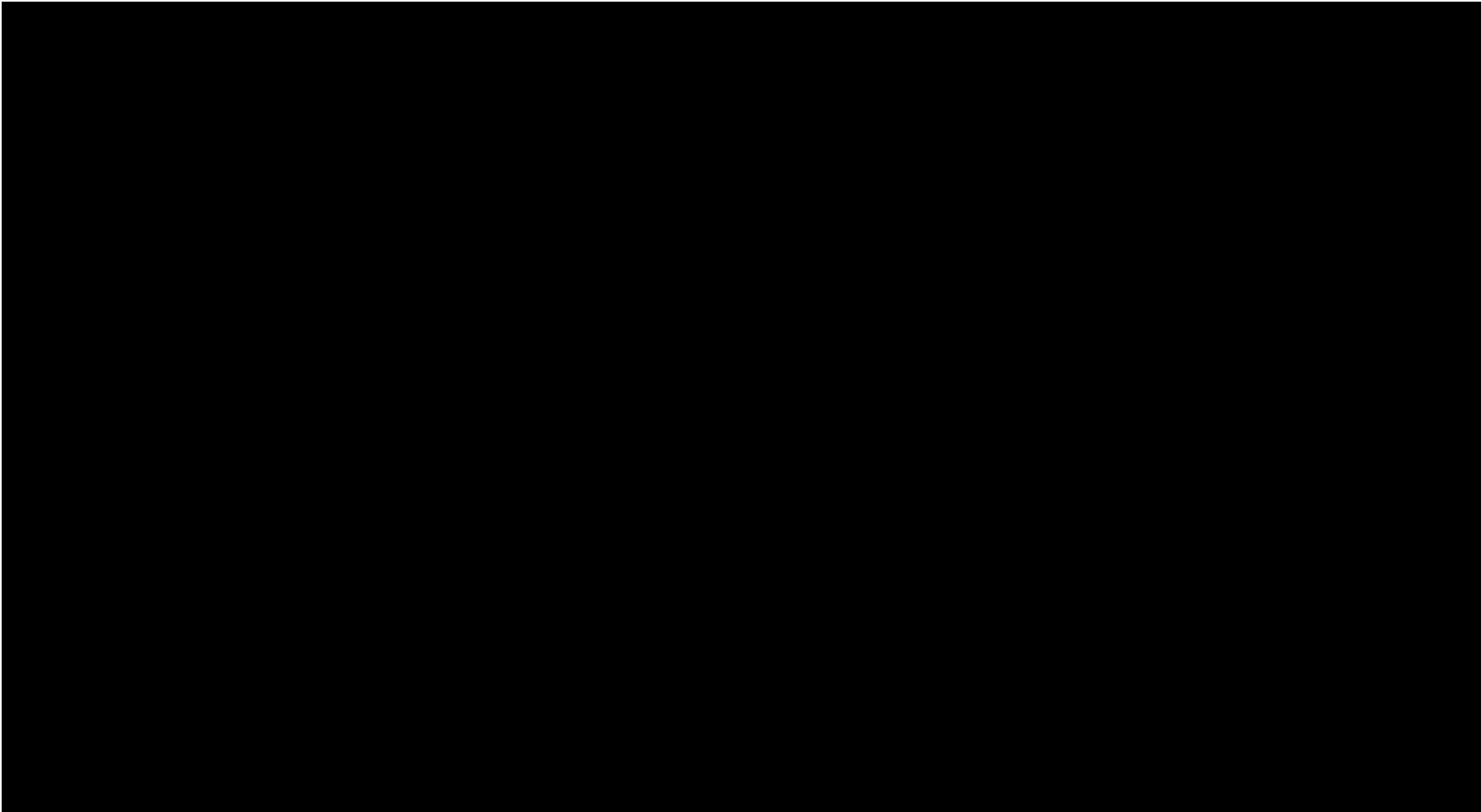
Sees problems as opportunities

Can live in the weeds & not get lost

Will spend money to make money

Understands the client's need

Able to say "no"



**Lawyers often focus  
intensely on:**

**The firm name**

**The firm entity**

**The firm business card**

To make the launch meaningful &  
efficient:

**Focus on the client & the problem  
you solve, then proceed ahead**

*It's not the kite, it's the air.*

**The law firm name**

**Rules 7.1 & 7.5**

**DC Rules of Professional Conduct**

**Don't mislead, don't confuse, don't sound like  
something you are not**

If the firm is me,  
*me* is not a *Group* &  
not *Associates*

But *me* can be a *Firm*

[Legal Ethics Opinion 332](#)

The Mills Family Law Firm

**Be cautious about  
the unique name**

Panovia Group LLP

Disan LLP

Startup naming concepts

**Ipseity, from the Latin word *ipse*, meaning “itself”**

***“Ipeity reminds me of my core self,***

***the me beneath all layers of adaptation & personality,***

***and that’s why I choose Ipeity Law for the***



**Test drive  
the firm name**

**How to Choose a Name for a Law Firm**

# Consider a logo

[99.designs.com](http://99.designs.com)

[Best Law Firm Logos](#)

[Law Firm Logos on Pinterest](#)

[Logo basics](#)



Whose problems does this firm solve?

## The small firm's office

How, when & where you will solve your clients' problems drives the need for an office

DC does not have a physical presence  
requirement

But if you are working from an office (home) where  
you are not barred, you may need a professional  
address in DC.

**Carr WorkPlaces is**  
**a DC Bar member benefit**

**OSI Offices has nearly 1000 tenants & about half  
are lawyers**

**1629 K Street Suite 300**

**Washington, DC 20006**

# Avoid UPL

DC Rule 5.5 bars a DC Bar member from the unauthorized practice of law in another jurisdiction.

Be careful to whom you email.

The entity

**Know why you need an entity**

**Sole proprietor is an option**



# Resources on forming a business in DC

Useful information from DCRA

Know about estimated taxes

DC recognizes PLLC

# Your firm needs an EIN

Apply to the IRS for an Employer  
Identification Number

Use your firm's EIN to open its business  
checking account

# Small firm bank accounts

- The business or operating account
- The DC IOLTA, assuming there are IOLTA eligible funds
- The Trust Account for a single client or case, if needed

# Firm communication

## Your obligation in Rule 1.4

Be an active listener

Use an identifiable phone number

Use a professional email address

Have an appropriate business address

Be responsive

How to sound confident on the phone

Consider CallRuby or Smith.ai

# Malpractice Insurance

It is not mandatory in DC

An entity will not protect you

It is best to have coverage

USI Affinity is our member benefit

# Small Firm Tools

Laptops

Desktops

Chromebooks

Tablets

Manufacturer tech support

In-store tech support

Printers (all-in-one & dedicated)

Scanners

Dymo label/stamp printer

Phone system

# Estimated expenses

The annual range:

Low - no staff & office-on-demand

\$10,000 - \$20,000

High - staff & office space

\$115,000 - \$175,000

# Funding sources

Personal funds - the more, the better

Family & friends - be careful

Credit cards - be even more careful

Bank & SBA

Business incubator program

[Rule 5.4\(b\)](#) is NOT for a lender



# Funding guidelines

Create funding milestones

Bootstrapping is better

Do a cash-flow analysis

Estimate revenue realistically

Know fixed & variable costs

Use GAAP

Tie the Plan to funding

# Marketing

Educate, inform, network

A good, professional photo

A presence in social media

A good business card

Make it easy to be found

**Focus on the problem & it's solution**

# Michelle C. Thomas



[www.eliturner.com](http://www.eliturner.com)

# Resources

[DC Bar resources](#)

[DC Bar Communities](#)

[DC Bar CLE](#)

[SoloSez](#)

[MILO](#)

[Lawyerist](#)

[AttorneyAtWork](#)

[Our newsletter](#)

# Backup yourself

Backup data to a safe, encrypted external hard drive and/or the cloud

[Backblaze](#) [Carbonite](#) [Reviews](#)

[Rule 1.3, Comment 5](#)

[DC App. R. XI, §15\(a\)](#)

Request the Agreement for Emergency Backup Services

# Growth

Do you really need a partner?

[Lawclerk.legal](#)

[Montage Legal Group](#)

[Lawyer Exchange](#)

[UpWork](#)

# Where to find virtual staff?

- [upwork.com](https://www.upwork.com) (My personal favorite)
- [freelancer.com](https://www.freelancer.com) (general VAs - all categories)
- [fiverr.com](https://www.fiverr.com) (everything from powerpoint to logos to research and article writing for \$5)
- [atlasvirtualparalegal.com](https://atlasvirtualparalegal.com)
- [99designs.com](https://www.99designs.com) (logo and graphics)
- [guru.com](https://www.guru.com) (great pool of admin and paralegal support)
- [virtualparalegalservices.com](https://virtualparalegalservices.com)
- [thevirtualparalegal.com](https://thevirtualparalegal.com)
- [starrparalegals.com](https://starrparalegals.com) (bankruptcy specialty)
- [flex-counsel.com/](https://flex-counsel.com/)
- [equivityva.com](https://equivityva.com)
- Off-line options:
  - local colleges

The small firm  
lawyer is a  
business owner

You depend on your community.  
Be a good citizen.



How do you do that?

By answering these questions:

**Why am I here?**

**What's going on around me?**

**What am I going to do about it?**

**How will my actions affect others?**

The result:

Clarity

Awareness

Ability to adapt &  
shape circumstances

Resilience

# Rules drive behavior

Rules set a standard of care

Some say "shall", some "may"

Rules drive how we manage

# Managing is simple

It's figuring out what to do

Doing it habitually

Creating good habits

Making checklists

Creating workflows

Following-up

**Managing gets  
complicated  
when it's neglected**

# The upside of managing

You are above the  
standard of care;

You are building credibility;

Clients are happy;

Others are impressed;

You have space & time to be a  
lawyer

# The downside of neglecting

**You are vulnerable**

**You spend more time on your  
problems & less on client problems**

**You live & work under a dark cloud**

Good management takes  
less time than bad  
management



Getting started

**Form the intent**

**Create the time & space**

**Pick a tool**

# The tools

Pens & paper

Computer & software

The Plan

Concept mapping

Spreadsheets & databases

Calendar

**The power of now**

**&**

**the power of no**

# Client intake

Draft the process of how  
a PC becomes a C

*Going from Prospective Client to Client*

Create the intake form

# Client intake triggers

## Rule 1.18

How are you contacted?

How do you document?

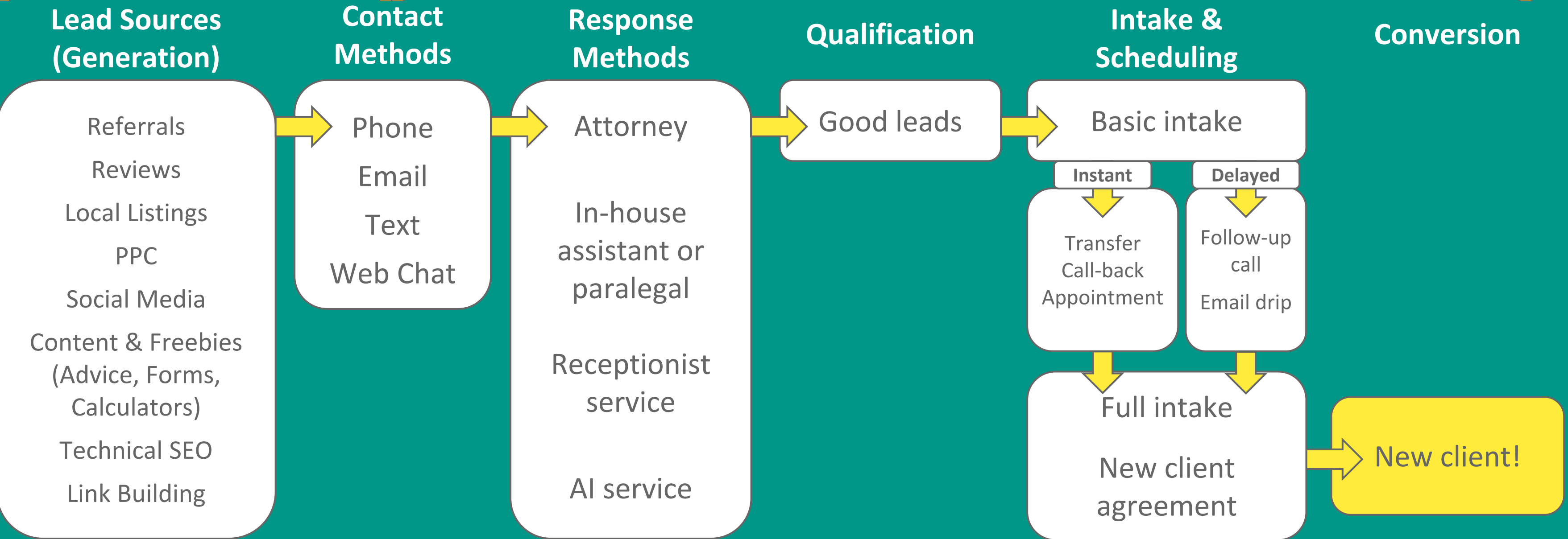
What do you create?

How do you protect?

# LEAD CONVERSION FLOW

## GENERATE

## CAPTURE



## Qualification

## Future Clients & Good Will



Would you put your intake  
form on your website?

Bailey & Galyen has several here

Does it need a disclaimer?

At what point do you have a  
"prospective client"?

# Managing referral sources

Harvest this information  
Thank them without violating

Rule 1.6

Market to referral sources



File creation, organization & maintenance

**How you organize this process will  
impact you & the client.**

**How you carry it out will be key to  
your client's solution & to your  
success.**

# It once was this simple

United States  
v  
John Edwards  
file



Abbe  
Lowell

**Client data now has multiple forms,  
formats & locations**

**Paper  
Digital  
Images  
Video  
Audio**

**Various formats / various devices**

It is all a part of the client  
file

LEO 333

Know what & where the data is;

Organize it, protect it, back it up;

Manage it & keep it useful;

It belongs to the client.

**Are you preserving  
texts?**

**Phoneview  
Messages**

**Documenting text messages  
How to save text messages using  
Android or iOS**

# Sample file workflow

Client intake tool / Conflicts check

New matter sheet

Calendar system

Billing system

Case management system

Ideally all should be synced

# Conflicts checking

## resources

LA, not DC compliant

# Sample client/problem workflow

Client intake completed

Fee Agreement

Communication protocol

Cause of action / SOL

Notice issues

Pleading preparation



# File closing workflow

Review scope in the fee agreement

Disengagement/status client letter

File organization & closing

Billing status & conclusion

Client trust account status

Archiving the file & data

Take aways for the Plan

# Time & billing workflow

Client established

Fee agreement reviewed

Data entry following action

Draft of report

Finalize & send

Followup

# Communication workflow

Client established

Fee agreement reviewed

Initial client letter

Work product transmission

Third party information

Status reports

Disengagement / conclusion / file

# Management Tools

Clio a DC Bar benefit

Rocket Matter

MyCase

Cosmolex

The Form Tool

Smokeball

Lawyerist Reviews

# Staff

How to determine the need

How to determine the cost

\$70K is really \$88K

Keep payroll well below 40% of revenue

How to Evaluate Law Firm Financials

# Hiring resources

[Mechanics of hiring](#)

[eGuide to hiring](#)

# The uniqueness of [Rule 1.6](#) in DC



**Kenneth P. Vogel** ✓

@kenvogel

Follow

Here's a photo of Ty Cobb & John Dowd casually & loudly discussing details of Russia investigation at @BLTSteakDC while I sat at next table.



# What checking accounts do I need?

- **Operating (business) checking account - a commercial checking account for your firm**
- **IOLTA Trust Account (assuming you have IOLTA eligible funds) Create with the IOLTA Registration Form**
- **Trust Account for a single client or case (only if you have a non-IOLTA eligible fund that will generate interest for its owner)**



## IOLTA eligible funds . . .

- **Must be held in an approved IOLTA bank;**
- **Are funds that are nominal in amount, or**
- **Held for a short period of time;**
- **Such that effort to administer consumes interest income.**
- **Example of an account name: *Daniel M. Mills DC IOLTA Account*;**
- **Interest goes to the DC Bar Foundation for pro bono legal services.**

## **Three exceptions in Rule 1.15(b) & (e)**

- **“ . . . when the lawyer is otherwise compliant with the contrary mandates of a tribunal . . . ”;**
- **If you are licensed and principally practice in another jurisdiction and are IOLTA compliant there; Rule 1.15(b);**
- **“unless the client gives informed consent to a different arrangement.” Rule 1.15(e)**

# Trust Account Records

- What are you required to keep? *Complete records*  
- Rule 1.15(a);
- How long? . . . *for a period of five years after termination of the representation.* Rule 1.15(a);
- But is it ever safe to destroy trust account records when there is no statute of limitation on a Bar Complaint?

# Complete records?

- **What are complete records of a trust account transaction?**
- **If Disciplinary Counsel cannot figure it out from your records, then your records are not complete.**
- ***In re Donald A. Clower*, 831 A.2d 1030, DCCA 2003.**

- **“Complete records” tell the full story of how the lawyer handled the money and whether the lawyer followed the Rules;**
- **If the records show what happened and that you complied with the Rules, then they are complete;**
- **“The reason for requiring complete records is so that any audit of the attorney’s handling of clients funds by Bar Counsel can be completed even if the attorney or the client, or both, are not available.” *In re Clower* at 1034.**

# Managing Money



IOLTA



Operating

So where does the money go?

If the Fee is an ...

Advance Fee



It goes in your...

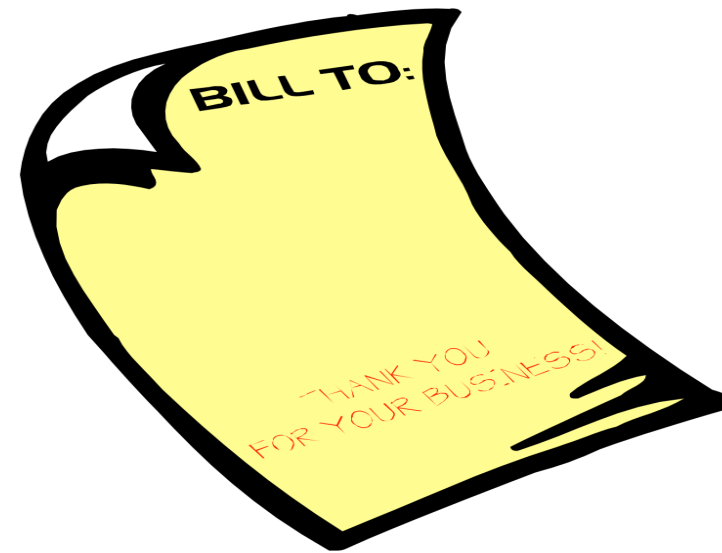
IOLTA Account



Then you....



Perform the work



Send invoice

And then...

Move the money per your fee agreement ...

From



IOLTA



To



Operating

These separate accounts can be at the same bank or different banks

What if you get paid after the work is performed?



Then you deposit straight to...

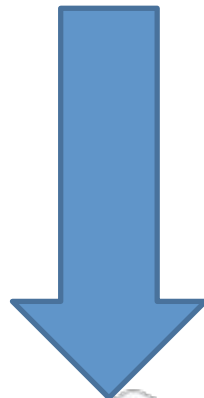


Operating Account

NEVER



Advance Fee



Operating Account

**UNLESS.....**

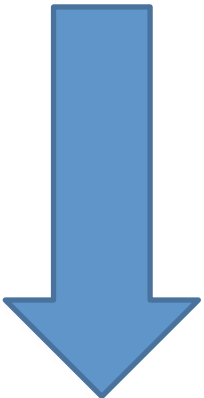
**You obtain the client's "Informed Consent" to deposit their money into your operating account - Rule 1.15(e).**

**Best Practice Tip: Don't Do This!**



Your Money

NEVER



IOLTA Account

Except....

You can put your own money into an IOLTA Account pursuant to D.C. Rule 1.15(f) which says...

*Nothing in this rule shall prohibit a lawyer from placing a small amount of the lawyer's funds into a trust account for the sole purpose of defraying bank charges that may be made against that account.*

## **In Re Mance**

**980 A.2d 1196 (D.C. 2009)**

- **A flat fee is now an advance fee when it is paid before work begins**
- **Rule 1.15(e) applies - it must be entrusted**
- **Flat fees go into the IOLTA Trust Account**
- **The fee agreement determines how and when you earn the fee**
- **A lawyer cannot earn a fee for doing nothing. *In re Sather*, 3 P.3d at 414**



# When does a flat fee go into the operating account?

- When the work is done and the fee is earned.
- If a flat fee is paid after the work is performed, it goes into the operating account.

# Availability - What's that?

- **Flat fee for work is not an *engagement retainer* (classic definition)**
- **Engagement retainer refers to availability, if required**
- **Flat fee for a task-based matter covers all the work to be done**
- **LEO 355 - Flat Fees & Trust Accounts**
- **Availability gigs are rare and unique**

# Rule 1.15(e) informed consent - what is needed?

- **Flat fees normally are entrusted**
- **Un-entrusted fee will be treated as the lawyer's property**
- **Lawyer must work for the fee to keep it**
- **Lawyer must explain the benefit or service**
- **Lawyer must refund any fee not earned**
- **Fee is subject to the lawyer's creditors**

*What is the message sent by this?*

# **IN RE KENNETH A. MARTIN**

**NO. 11-BG-775 DCCA February 13, 2014**

- **If a client, *with reasonable promptness*, disputes a lawyer's fee after it has been withdrawn from the trust account, the lawyer must return the disputed sum to the trust account;**
- **Unearned fees that must be returned to the client under Rule 1.16(d) include an arbitration award in favor of the client.**

## **Be alert for the scam**

- **It's very sophisticated now;**
- **It involves a check to deposit in your trust account and fees for you;**
- **The scammer will want funds wired;**
- **Wait for the check to clear. That is the only way to know if it is a fake check.**
- **And use a unique procedure under the UCC for added protection.**

# **And if you want to be safe . . .**

- **Ask the bank to send the check for “collection” (UCC 4-501);**
- **Allows for positive confirmation the check has been paid before any funds are disbursed.**

# Ethics help . . .

- From the DC Bar, it is free & confidential;
- Hope Todd, Saul Singer, Nakia Matthews & Erika Stillabower;
- 202-737-4700 ext 1010
- [ethics@dcbar.org](mailto:ethics@dcbar.org)

# Practice Management

- **Dan Mills / 202-780-2762**  
[dmills@dcbar.org](mailto:dmills@dcbar.org)
- **Rochelle Washington / 202-780-2764**  
[rwashington@dcbar.org](mailto:rwashington@dcbar.org)



# November 7 session

In the business plan template, draft your firm's Mission Statement, the General Firm Description & create a concept map of your strengths & weaknesses as a small firm lawyer.

(page five of the Business Plan template)

**Explore**

**Zwillgen**

**NakiaGrayLegal**

**Potomac Law Group**

**Free and confidential ethics guidance**

**Help with business issues from the Practice  
Management Advisory Service**

**Help with stress, addiction & personal issues from the  
Lawyer Assistance Program**

**Fee dispute resolution with the Attorney Client  
Arbitration Board**