

Session Two
Successful Small Firm
Practice Course

Fee Agreements
November 7, 2020

The Fee Agreement is part of
our first interaction with the
prospective client

Rule 1.18

What does it feel like
for the prospective client?

What is empathy?

**Understanding what it feels
like to be someone you never
imagined being.**

From Session One

[Brene Brown on Empathy](#)

The public's perception of lawyers

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]?

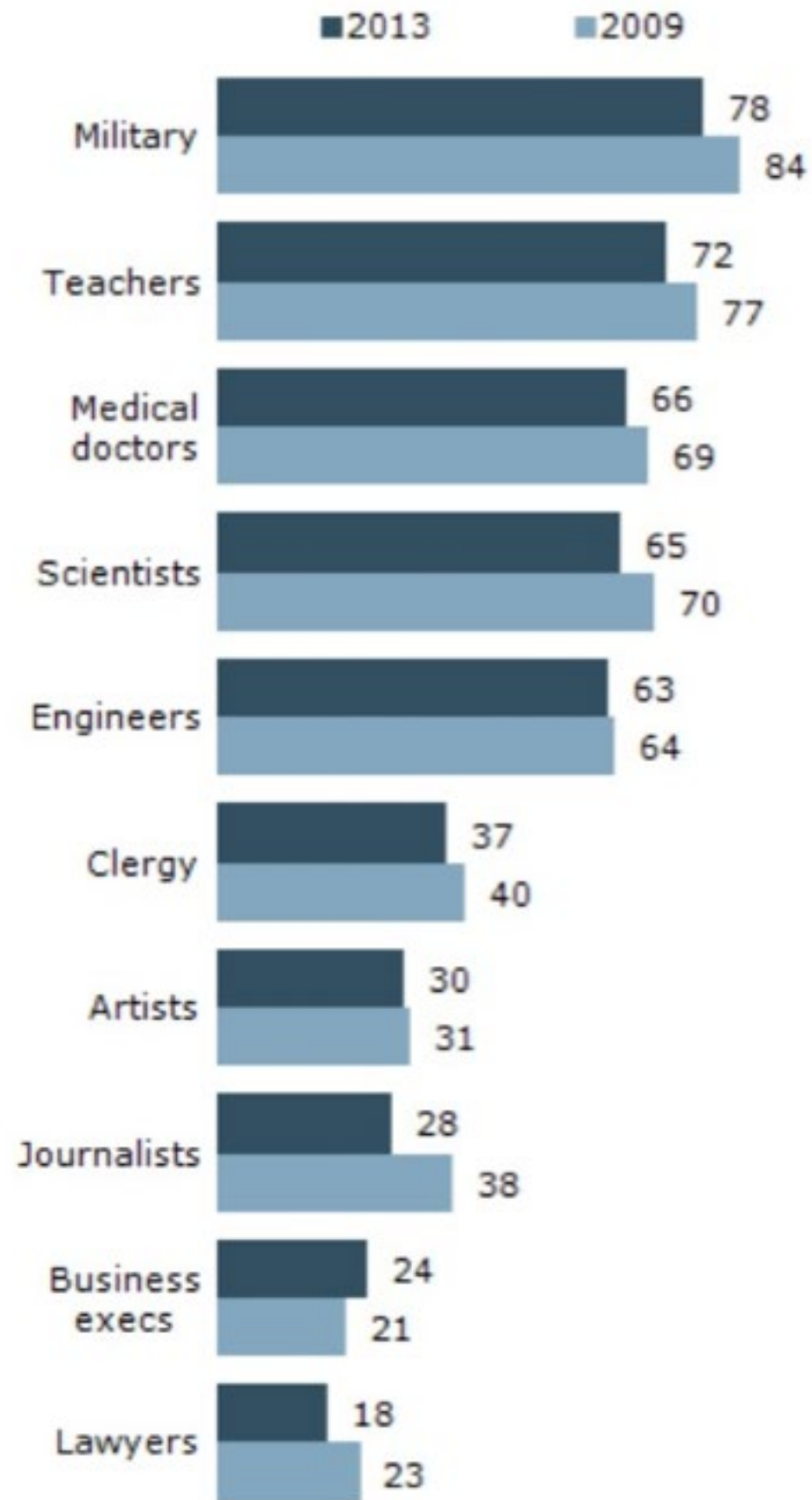
	Very high	High	Average	Low	Very low	No opinion
	%	%	%	%	%	%
Nurses	28	56	15	2	*	*
Medical doctors	15	52	25	6	2	1
Pharmacists	14	52	28	4	1	1
High school teachers	17	43	29	8	2	1
Police officers	15	39	32	9	4	1
Accountants	5	37	48	6	1	3
Funeral directors	8	31	42	8	2	7
Clergy	8	29	43	12	3	5
Journalists	7	26	31	21	13	2
Building contractors	4	25	49	17	3	1
Bankers	3	24	50	17	4	1
Real estate agents	2	23	54	15	4	3
Labor union leaders	4	17	42	23	8	5
Lawyers	3	16	51	21	7	1
Business executives	3	14	49	26	6	3
Stockbrokers	2	12	48	26	6	6
Advertising practitioners	1	12	46	29	8	4
Telemarketers	1	8	32	33	23	2
Members of Congress	2	6	33	38	20	2
Car salespeople	1	7	47	33	11	2

Dec 3-12, 2018

GALLUP

Trend in Perceived Contribution

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



What is our intent with the
fee agreement?

Rule 1.5

What else?

The fee agreement is a plan
for:

solving the client's problem,
getting paid,
building trust.

It starts with a conversation

Is the client properly identified?

Is the scope of the
representation complete?

Is the fee clearly
established?

Are the expenses & means of
payment set out?

Is a third party paying
the fee?

Do you need to cover
inside & outside costs?

Are the client's duties set
out?

How & when will you
communicate with your client?

Are other lawyers
involved?

Is fee sharing involved?

How does it end & what happens to the file?

When do you start? Signed
agreement? Money?

How do you handle the
advance fee?

Is consent to waiver
really informed?

Is a line of credit
involved?

Are you being paid
by credit card?

How will you handle a fee
dispute?

How do you handle
termination of services?

Is a third party service provider needed?

What is the billing or
accounting process?

Do you address
expectations?

What about pro bono
work & fee recovery?

Does your fee agreement
build trust?

You may request a zip
file of Word forms
dmills@dcbar.org

Examples from the zip
file

everything is
MARKETING



Applicable Rules:

7.1

7.5

Legal Ethics Opinions

Codes, regulations &
other jurisdictions can
also apply.

Example:

Bergman v District of

Columbia

[DC Court of Appeals 08-CV-859](#)

Marketing is anything we do that changes the culture for the better.

- Seth Godin



The first step . . .

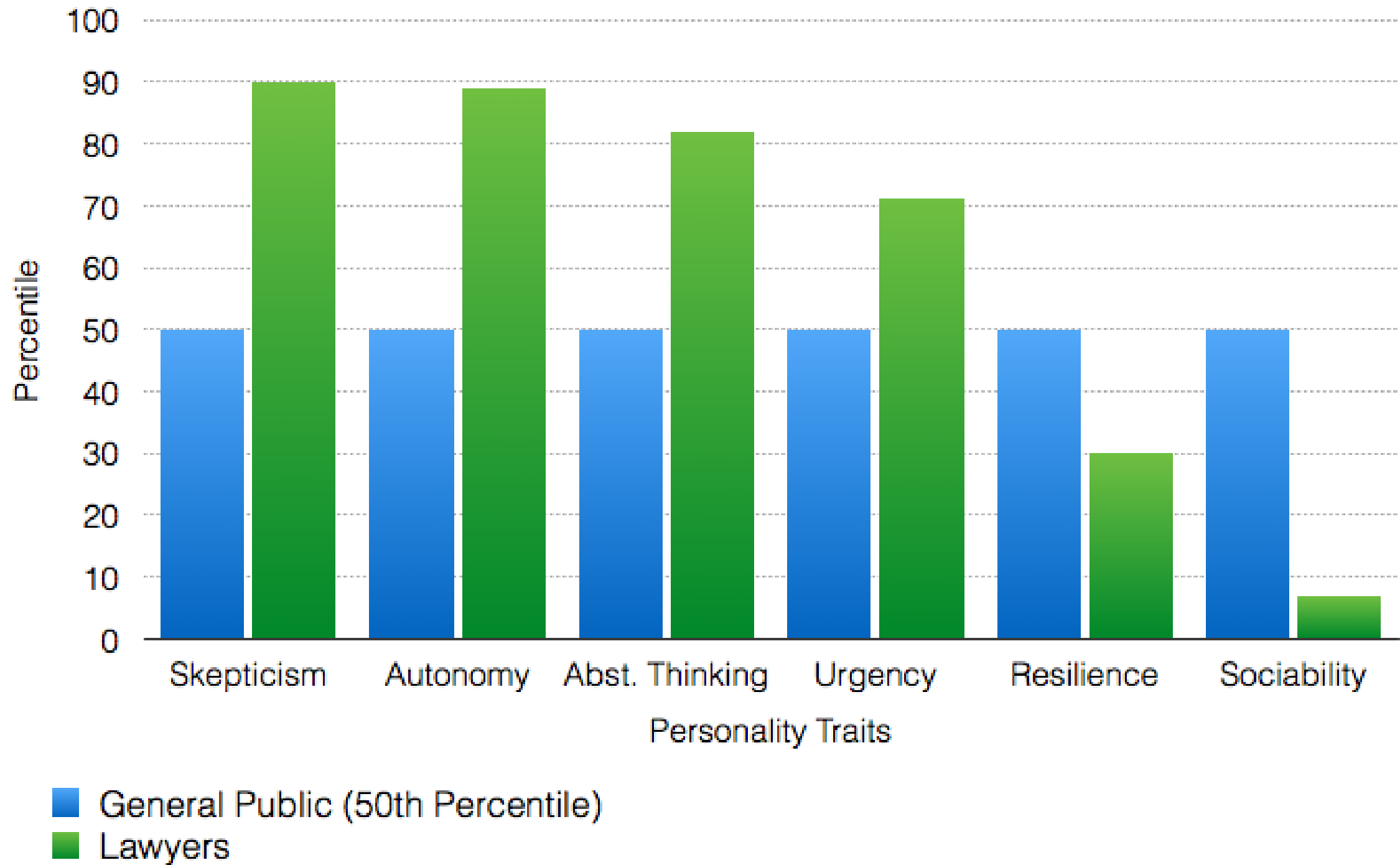
**Start from what is
real & true.**

**I act
on the basis
of my
self-image.**

Own who you are.

Own where you are.

The 6 Predominant Lawyer Personality Traits



From the research of Larry Richard, Ph.D.

Our choice . . .

-to talk about us

or

**-to talk about the
problem we solve**

Your perpetual questions:

How does the client see me?

**What is the client's experience
with my firm?**

**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.com



This is Serious

No one thinks their child will end up here
For HELP when the unthinkable happens call

Thomas Wight

Attorney at Law

404-502-3967

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

If you had the chance
to provide information
at that moment . . .

What would you say?

How can you inform and educate your ideal client at each stage of their problem recognition process?

The information you
would provide is . . .

content for
marketing messages.

Inform . . .

Be careful not to give
legal advice
when marketing.

The Miranda example . . .

You have the right to remain silent.

vs.

Never talk to the police.

The ideal client's
Problem Recognition Process

- What's going on . . .
- *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?*

Yellow page ads are aimed at the
last stage of the problem
recognition process:

Who is the right lawyer for me?

Legal Zoom is aimed at the early stages.

Questions you can ask to learn
about your client's

Problem Recognition Process

- ☒ Why did you come to me?
- ☒ Tell me about your problem?
- ☒ What will the solution feel like?
- ☒ What worries you now?
- ☒ What have you worried about in
the past?
- ☒ Who else have you told about this
problem?

Questions you can ask to learn
about your client's

Problem Recognition Process

- ☒ Is this the first time you have talked to a lawyer?
- ☒ What concerns you about talking to a lawyer?
- ☒ What is the best way for us to communicate?
- ☒ When did you first realize you had this problem? What did you do?

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

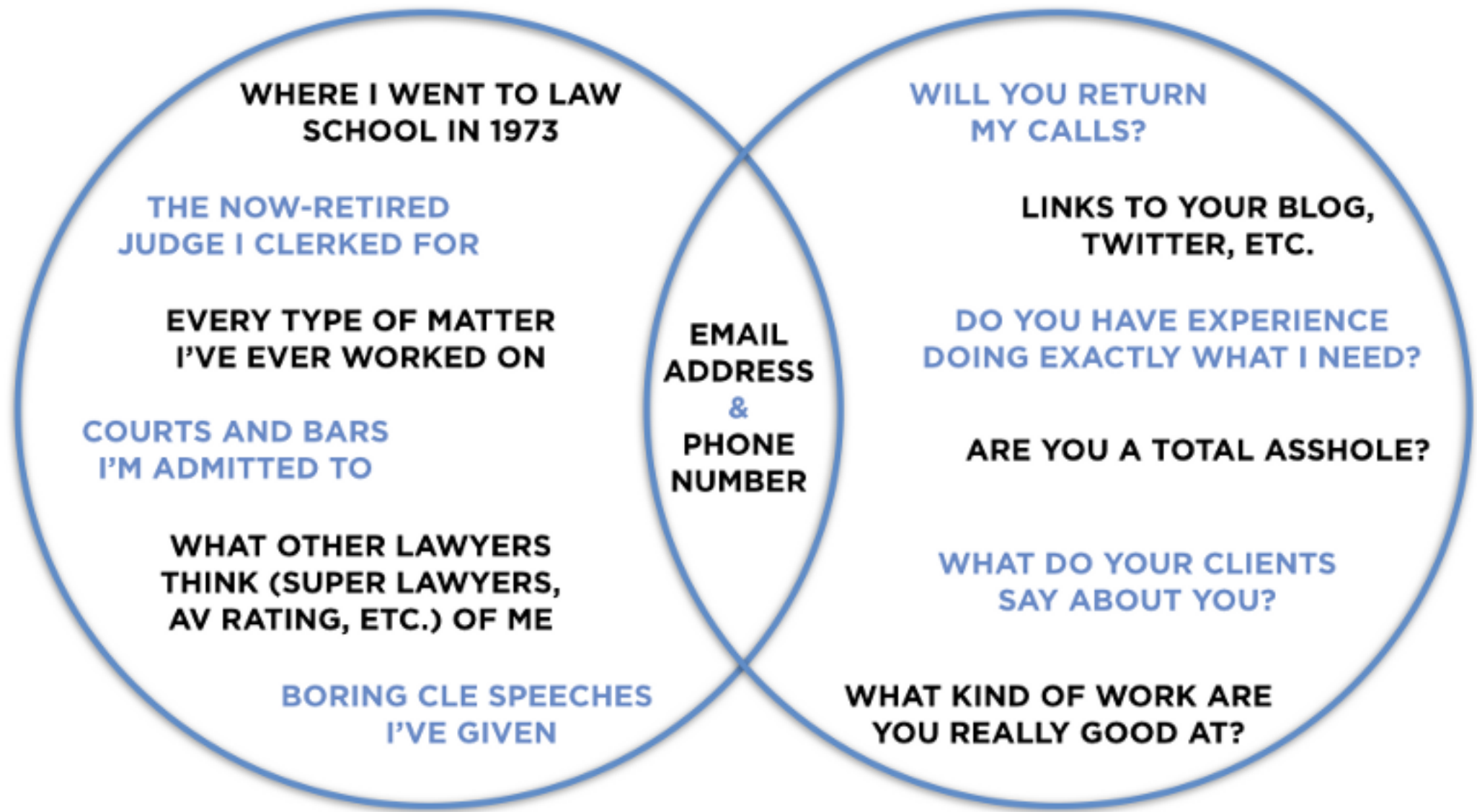
☒ Tell me what you know about this problem you want me to solve.

☒ Where have you looked for a solution?

☒ Since we have not worked together before, would you like to know how I charge to solve your problem?

**THINGS LAWYERS PUT IN
THEIR WEBSITE BIOS**

**THINGS CLIENTS WISH
WERE IN LAWYER BIOS**



What every prospective client needs to know & feel:

Why I need this lawyer?

Can my lawyer really help?

What do others think about my lawyer?

Is my lawyer right for me?

Can I work with my lawyer?

Will my lawyer care?

Take what you learn and engage

What do *process focused*
websites 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

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

And perhaps the finest example of "it's all about me"
lawyer marketing . . .

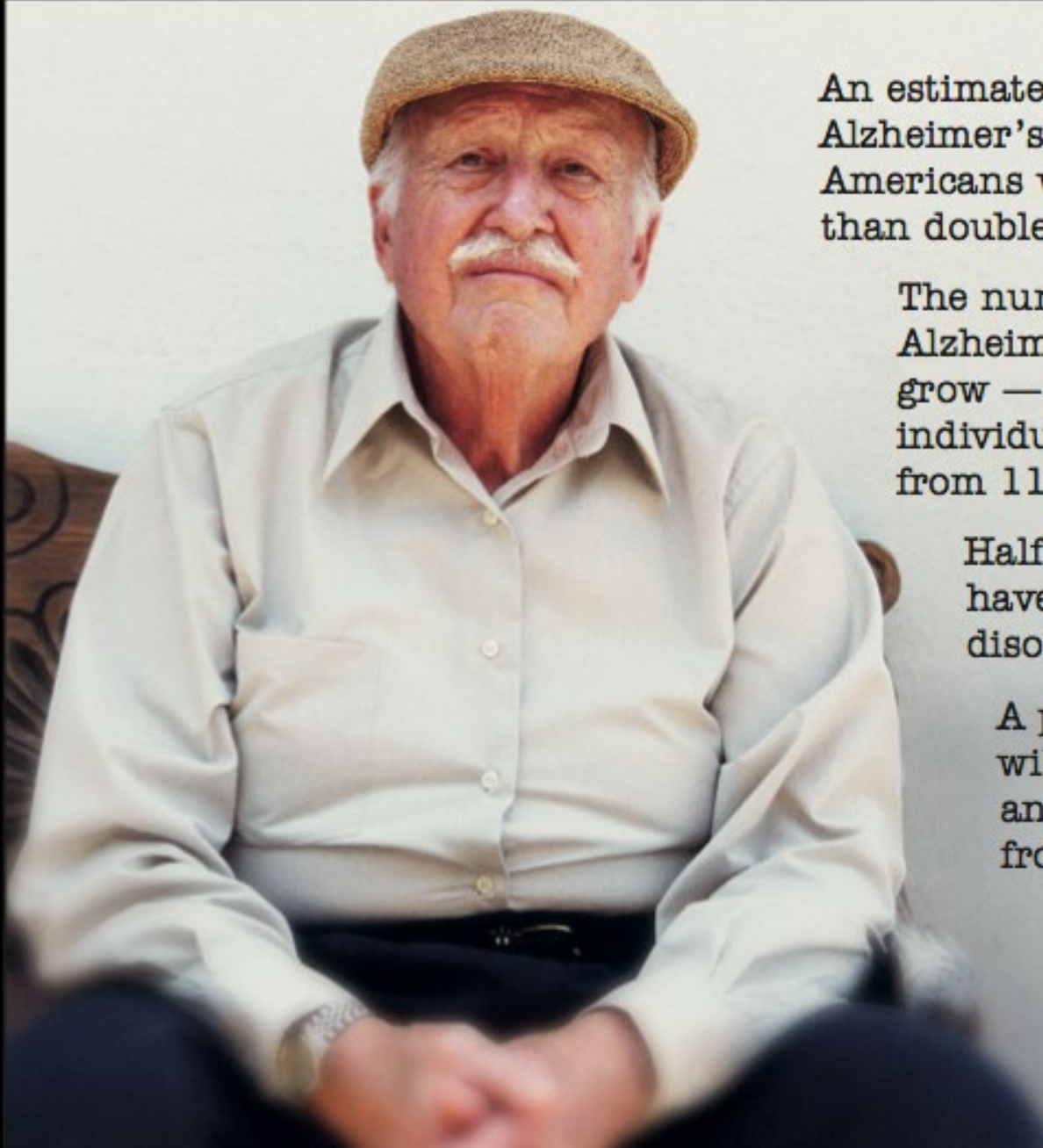


You are an estate planner
or elder lawyer . . .

and you know your ideal client
has a process . . .

How do you talk to them
while they are working their way
through their process?

“Dad Couldn’t Remember How To Get Home.”



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

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

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

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

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

(Source for all statistics: Alzheimer’s Association, 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

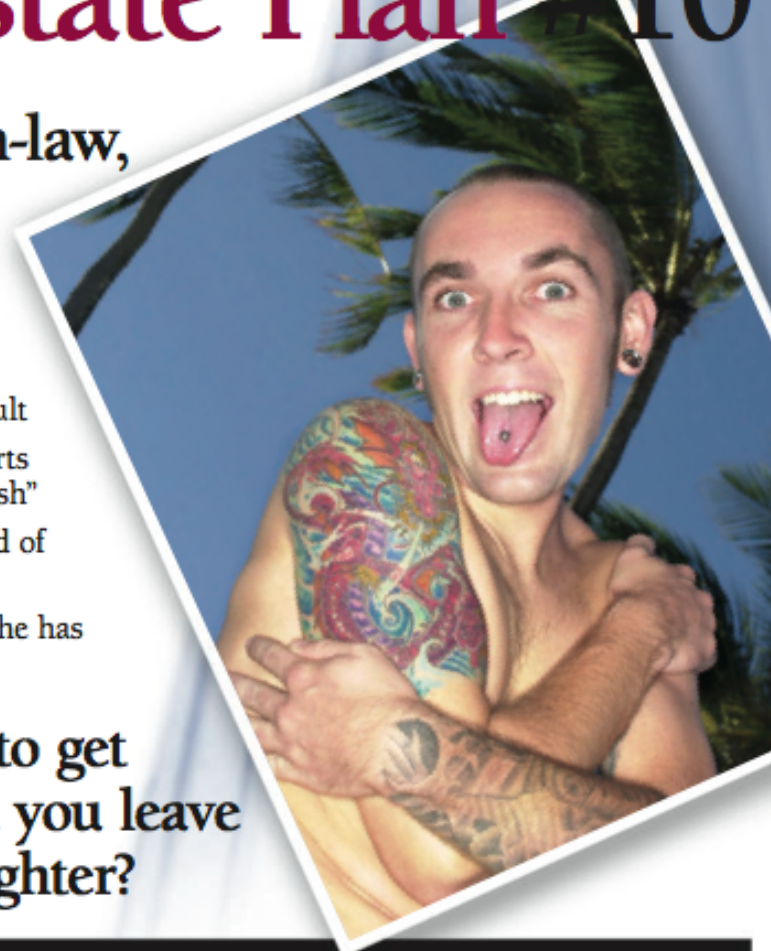
Cross Creek Pointe, Suite 402, 1065 Hwy. 315, Wilkes-Barre, PA 18702
(570) 822-6919

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
10:00am-11:30am

The Lodge at Rancho Mirage
68-900 Frank Sinatra Drive
Rancho Mirage

Thursday, February 16, 2006
6:30pm-8:00pm

The Lodge at Rancho Mirage
68-900 Frank Sinatra Drive
Rancho Mirage

Refreshments Served

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



 **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

Reason #11 Why Every Parent **Needs** An Estate Plan

Your daughter, Isabella

- Waved to you from the stage throughout her first appearance in the Nutcracker this past year.
- Wants to be a veterinarian when she grows up (either that or Cinderella).
- Loves to hike (in her tutu).
- Still falls asleep in your lap.

How important is *her* future?



FREE Estate Planning Educational Event

Wednesday, October 12, 2011
6:00pm

OR

Saturday, October 15, 2011
3:00pm

Mill Valley Community Center • Forest Room • 180 Camino Alto • Mill Valley

Seating is limited. Register today at www.TheaLaw.com

or call: 415-451-0123

*We strongly recommend both parents attend. **FREE CHILDCARE FOR EVENT!**



Thea Beatie Elliot
Attorney at Law and
local mom



TRUSTS | ESTATES | FAMILIES
Protect what you love.

700 Larkspur Landing Cir. • Suite 249
Larkspur, CA 94939
Tel (415) 451-0123 • Fax (415) 451-7644
www.TheaLaw.com

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

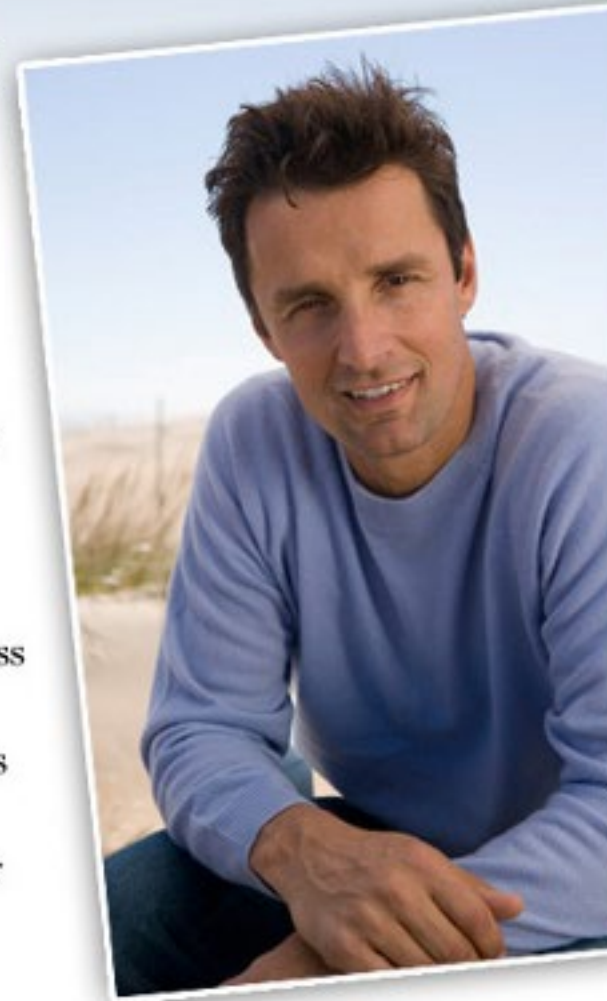


700 Larkspur Landing Cir.
Suite 199
Larkspur, CA 94939
Tel: (415) 451-0123
Fax (415) 451-7644
www.TheaLaw.com

Reason #6 To Get A Divorce

Your husband, Alex

- Helps with the dishes, then acts like he should get a medal
- Sheds so much hair, your bathroom floor looks like it has a rug on it
- For Christmas, gave you a dual-bag vacuum cleaner
- Main occupation in life is watching endless hours of sports on TV
- Refers to your favorite sushi restaurant as “the bait shop”
- While out to dinner with you and another couple, likes to hit on the waitresses
- Or your best friend



Are You Sure You Want To Stay Married?

**Call Today For A Complimentary and Confidential
Divorce Consultation: 626.683.8869**

RUSSAKOW | RYAN | JOHNSON

LAW

RRJ

Pasadena Office

225 South Lake Avenue, 10th Floor

Pasadena, CA 91101

626.683.8869 tel

626.683.8870 fax

Ontario Office

3633 Inland Empire Blvd., Ste. 777

Ontario, CA 91764

909.466.1661 tel

909.466.1662 fax

Orange County Office

2603 Main Street, Ste. 1050

Irvine, CA 92614

949.833.8838 tel

949.833.8808 fax

SmartMarketing

Lots of free information here

Good ideas here

Elements of a good,
long term
marketing system

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

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

Give this talk to groups
& organizations.

Break the talk into one
to three minute videos.

Create a database of
contacts

in Outlook,

in a spreadsheet,

or in any other

functional system.

Who goes into your
contacts list?

Friends, family, clients,
former clients, potential
clients, professionals &
anyone who can refer
someone with a problem.

Sophisticated contact management
software review:

[http://contact-management-software-
review.toptenreviews.com/](http://contact-management-software-review.toptenreviews.com/)

www.salesforce.com

A basic contact
management system . . .

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

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

Click the arrow heading cell in the column for sort and filter.

Contacts are referral
sources & potential
clients so long as you
engage with them.

How many opportunities
exist for you to be
found?

How many venues can you
create for your
marketing message?

You & your presence

Your office

Business card

Website (video)

Newsletter

Blog

Brochure

Social media

Community engagement

Speaking engagements,

books & free publications

are useful tools

A professional photograph is essential

[Michelle C. Thomas](#)



www.eliturner.com

Create a great logo



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

Sources for unique & traditional cards:

Moo.com

DesignYourOwnCard.com

Crane.com

VistaPrint.com

6 Major Mistakes to Avoid When Selecting An Estate Planning Attorney

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

Why the newsletter works

Targeted to your audience

Regularity

Long-term tool

Becomes a part of your process

More cost effective

Few do it well

Hardcopy is better than electronic

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



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.

Email post links
back to blog

GrandJuryTarget.com

The concept applies in
any practice area . . .

Employer Alerts by
Charles H. Fleischer

Relate to Marketing
like it is
your best client.

How would you treat your
best client?

You would have a plan

You would strategize

You would open a file

You would work on it every day

You would evaluate it often

You can do the work yourself:

[Rollins & Chan](#)

[Wufoo form builder](#)

[Square Space](#)

[How to create a Facebook business page](#)

Or you can use a service:

[Mockingbird Marketing](#)

[Foster Web Marketing](#)

[Great Legal Marketing](#)

[SmartMarketingNow.com](#)

[UpwardAction.com](#)

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

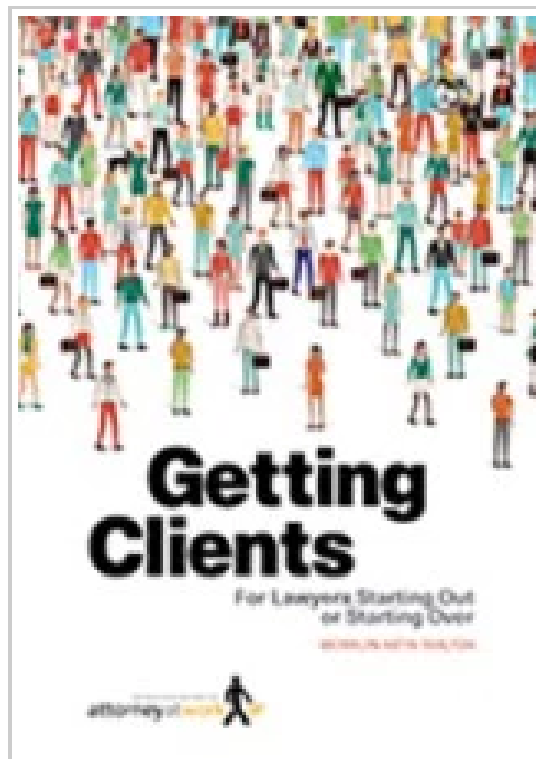
[Great Legal Marketing & Renegade Lawyer Marketing](#)
by Ben Glass

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

Getting Clients

Getting Clients: For Lawyers Starting Out or Starting Over

BY MERRILYN ASTIN TARLTON



Save when you pre-order by October 31 - Just enter the code "[GettingClients10](#)" at checkout for 10% off the normal price.

Price: \$40.00

[BUY NOW](#)

The most difficult challenge you face as a lawyer is figuring out how to get clients. Particularly if you're a young lawyer. It can feel like there is a secret no one is telling when other lawyers have lots of clients with what looks like a minimum of work.

Merrilyn Astin Tarlton has been coaching lawyers to unlock those secrets for over 30 years. In her new book "**Getting Clients**," she brings extensive knowledge and a warm sense

of humor to walk you through what you need to be doing — and when you need to be doing it — to become the lawyer you have always wanted to be, doing the type of work you have always wanted to do.

Truths

All marketing works. Some work
better than others

Marketing is long term trust
building.

Bad phones kill good marketing.

More truths

You cannot impact a
feeling with a fact.

You can only impact
a feeling with a
feeling.

What is your mindset?

I have to market.

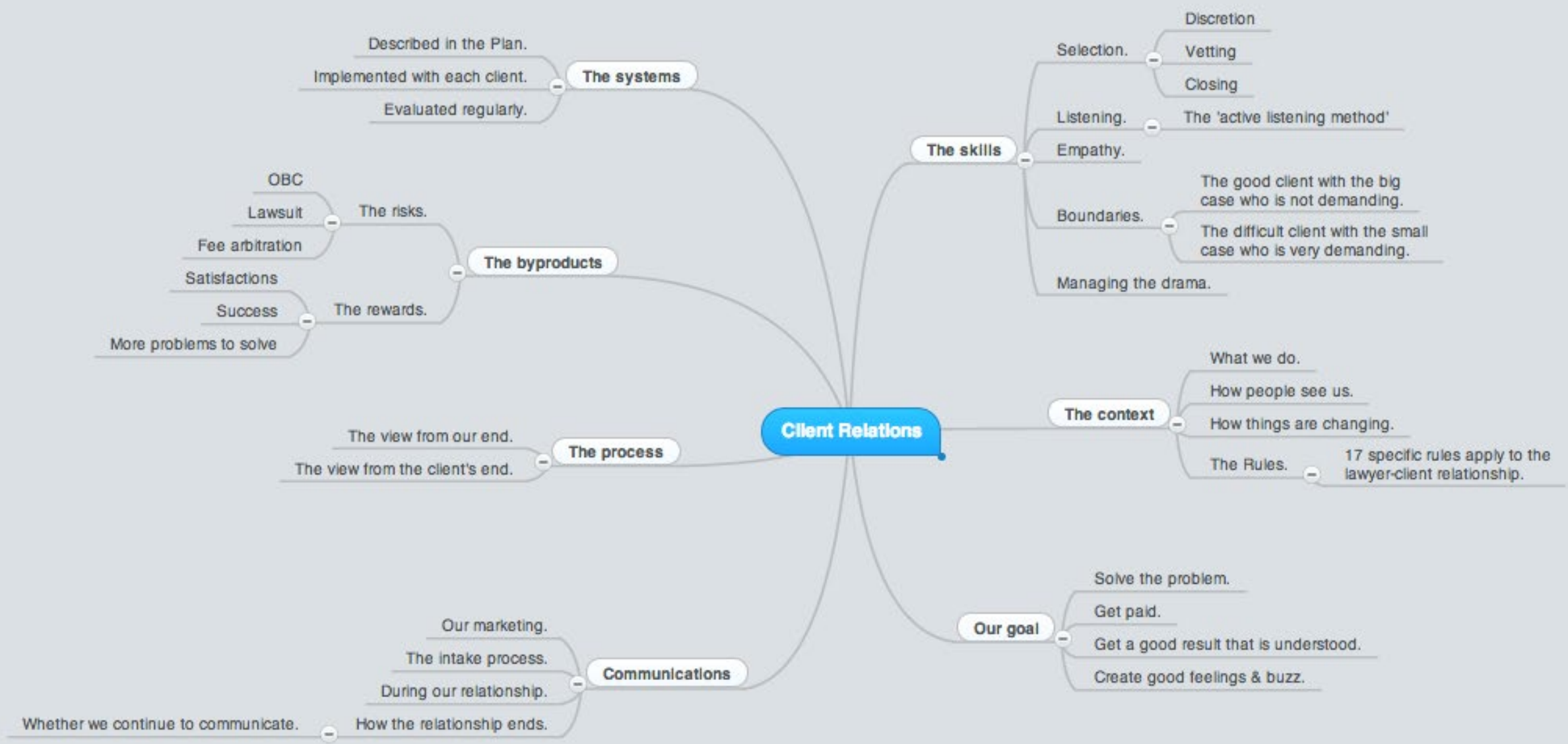
or

I get to market.

Client Relations

Successful Small Firm Practice Course

November 7, 2020



Client Relations

The systems

- Described in the Plan.
- Implemented with each client.
- Evaluated regularly.

The byproducts

- The risks.**
 - OBC
 - Lawsuit
 - Fee arbitration
- The rewards.**
 - Satisfactions
 - Success
 - More problems to solve

The process

- The view from our end.
- The view from the client's end.

Communications

- Our marketing.
- The intake process.
- During our relationship.
- How the relationship ends.
- Whether we continue to communicate.

The skills

- Selection.**
 - Discretion
 - Vetting
 - Closing
- Listening.**
 - The 'active listening method'
- Empathy.**
- Boundaries.**
 - The good client with the big case who is not demanding.
 - The difficult client with the small case who is very demanding.
- Managing the drama.

The context

- What we do.
- How people see us.
- How things are changing.
- The Rules.**
 - 17 specific rules apply to the lawyer-client relationship.

Our goal

- Solve the problem.
- Get paid.
- Get a good result that is understood.
- Create good feelings & buzz.

The context

“Lawyer”

“Legal profession”

trigger negative

responses

Until we are
needed to solve
a problem

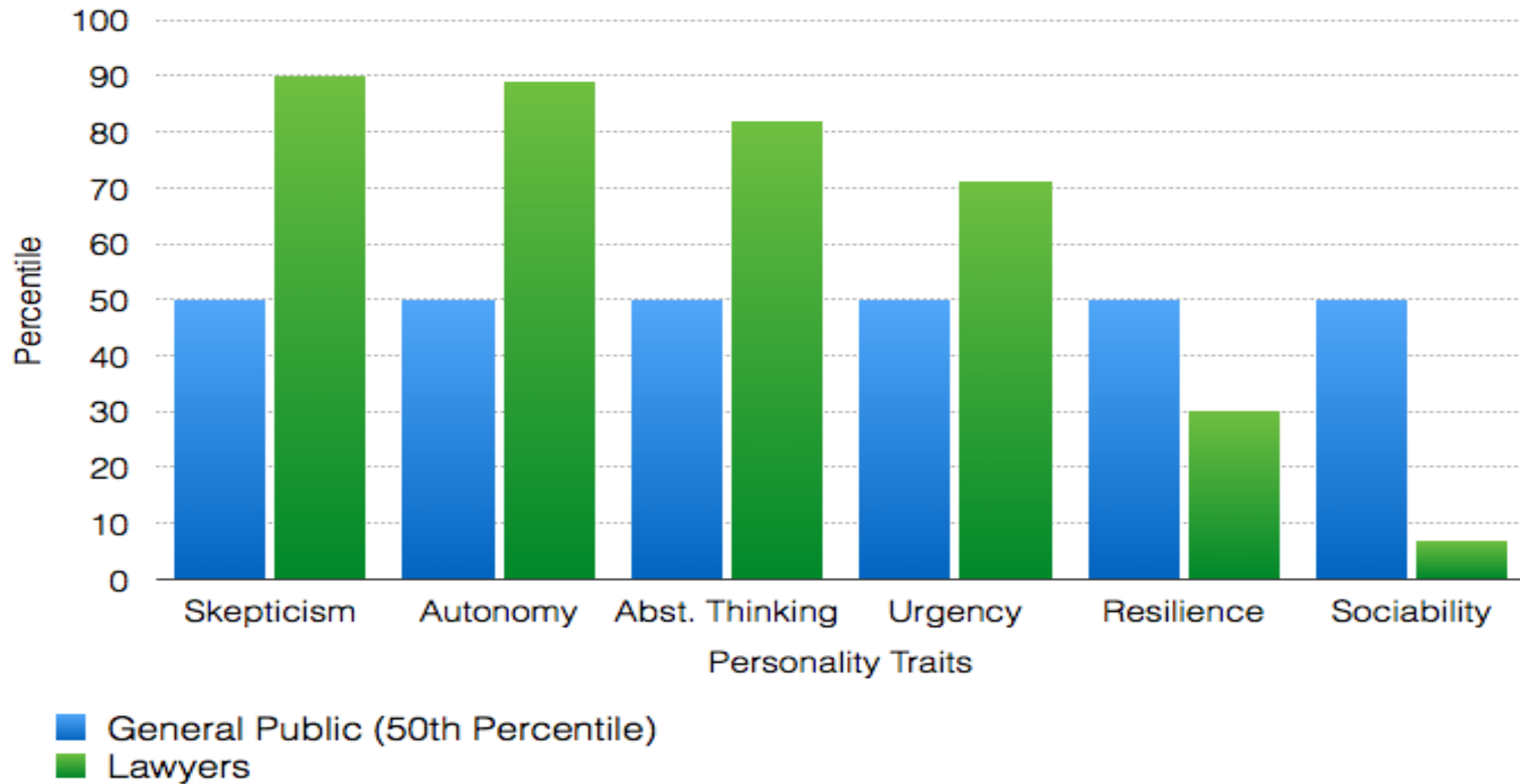
Within the
profession there
is turmoil

Lawyers struggle
with substance
abuse at nearly
twice the rate
of the general
population.

Lawyers lead the
nation with the
highest
incidence of
depression among
100 occupations.

And we solve
other peoples'
problems . . .

The 6 Predominant Lawyer Personality Traits



From the research of Larry Richard, Ph.D.

[Dr. Larry Richard / LawyerBrain.com](http://Dr.LarryRichard.com)

Often, the
problem we solve
is a piece of a
bigger problem
for the client

We work within a
challenging
context &
profession

The goal

Solve our client's problem

Get paid

Get a knowably good result

Create good will

Stay healthy

The skills

Problem solving

Selection

Listening

Empathy

Boundaries

Management

To have good
client relation,
select only your
ideal client

Vet the prospective client

Vet: to make a careful,
critical examination; to
assess, evaluate, screen

**Research data bases
& social media**

Use Experian's

service for lawyers

**Charge an
advance fee**

**Charge for the
initial consultation**

Charging for the initial consultation



Garner Law PLLC



60 Minute In-Office Consultation Session

Need advice on a legal issue? This session is designed to help you navigate your legal issue and includes review of your documents.



\$200 USD



1 hour



60 Minute Online Consultation Session

Need advice on a legal issue? This session is designed to help you navigate your legal issue and includes review of documents. Documents must be sent electronically at least 1 hour prior to the session.



\$200 USD



1 hour

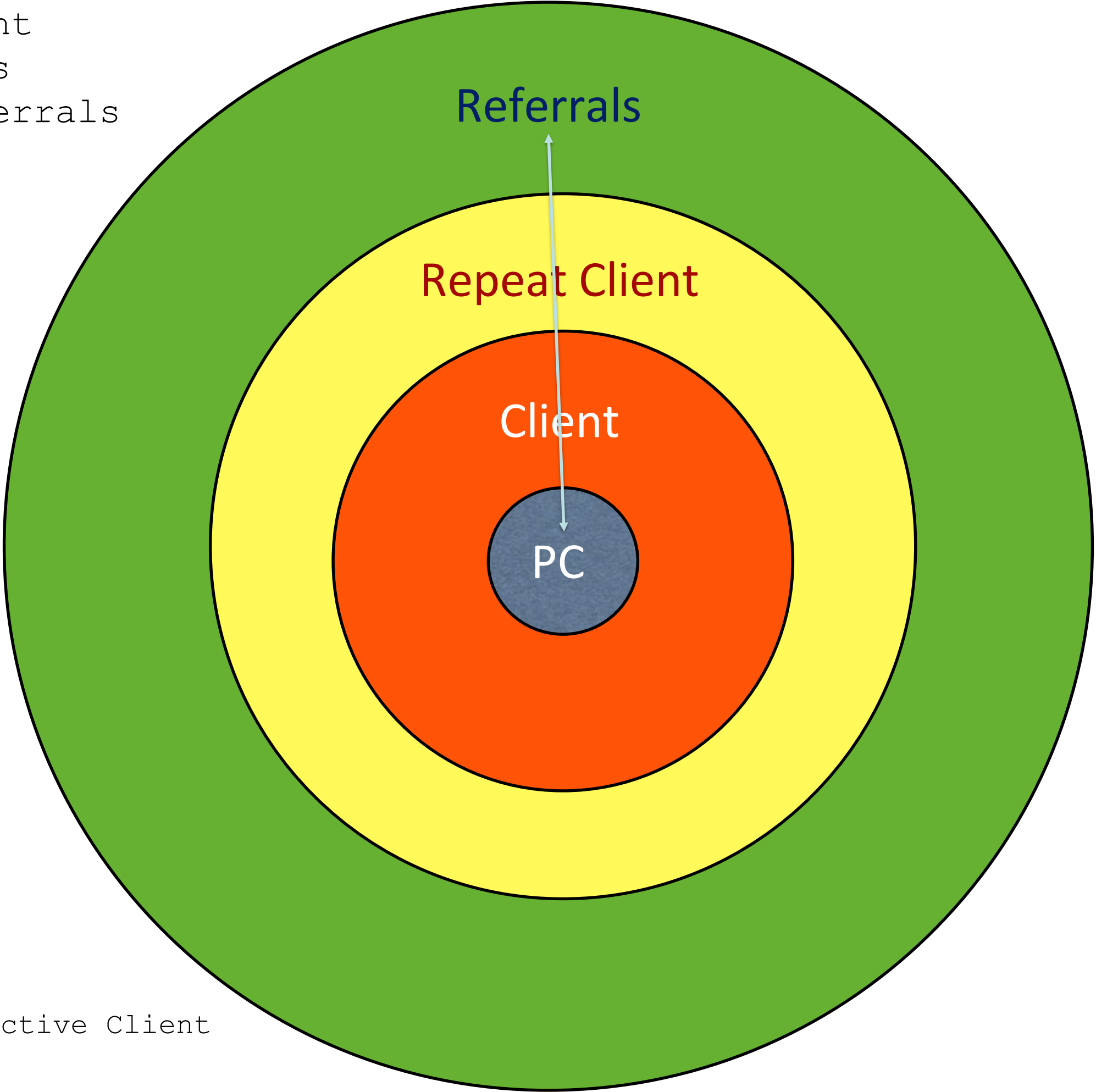
[Garner Law](#)

**Start work in the
client's presence**

**The client should “see”
you solving their
problem**

Create a system for
informing & educating the
client throughout the
matter

How client
relations
grow referrals



Referrals

Repeat Client

Client

PC

PC = Prospective Client

Survey the client both during
and at the end of the representation.

What was the client's experience?

[SurveyMonkey](#)

What does your client really want?

Gerber's six categories

(Chapter 15, page 104)

1. Tactile - direct communicator
2. Neutral - indirect (computer)
3. Withdrawal - ideas
4. Experimental - innovator
5. Transitional - dependable
6. Traditional - good deal

Client Relations & the Business Plan

Working a good plan is a foundation
for good client relations

Section V, Marketing - Clients, page 9

Section XI, Appendices - page 24
add "Lessons Learned"

Staff

How to determine the need

Determining the cost

Formula for determining true cost

Keep payroll well below 50% of revenue

Hiring resources

[Mechanics of hiring](#)

[eGuide to hiring](#)

[Payroll options](#)

How to hire & manage employees

[SBA Guide](#)

[LawHelp/DC employment issues](#)

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



**How to put the client at ease for
the initial consultation**

**Type their name in large, bold letters
on a sheet of paper.**

Place it where they will sit.

**Put their name on a folder with your
firm's name & contact information.**

How your phone is answered
is more important
than you think

[Why live call answering works](#)

Successful Small Firm Practice

District of Columbia Bar

Productivity, technology & the
essentials

November 7, 2020

The Three Cs of Small Firm Success

Competency

Chemistry

Compensation

Solid infrastructure . . .

- The Plan
- The Office Manual
- A system for engaging prospective clients
- A system for problem solving for clients

Working smarter . . .

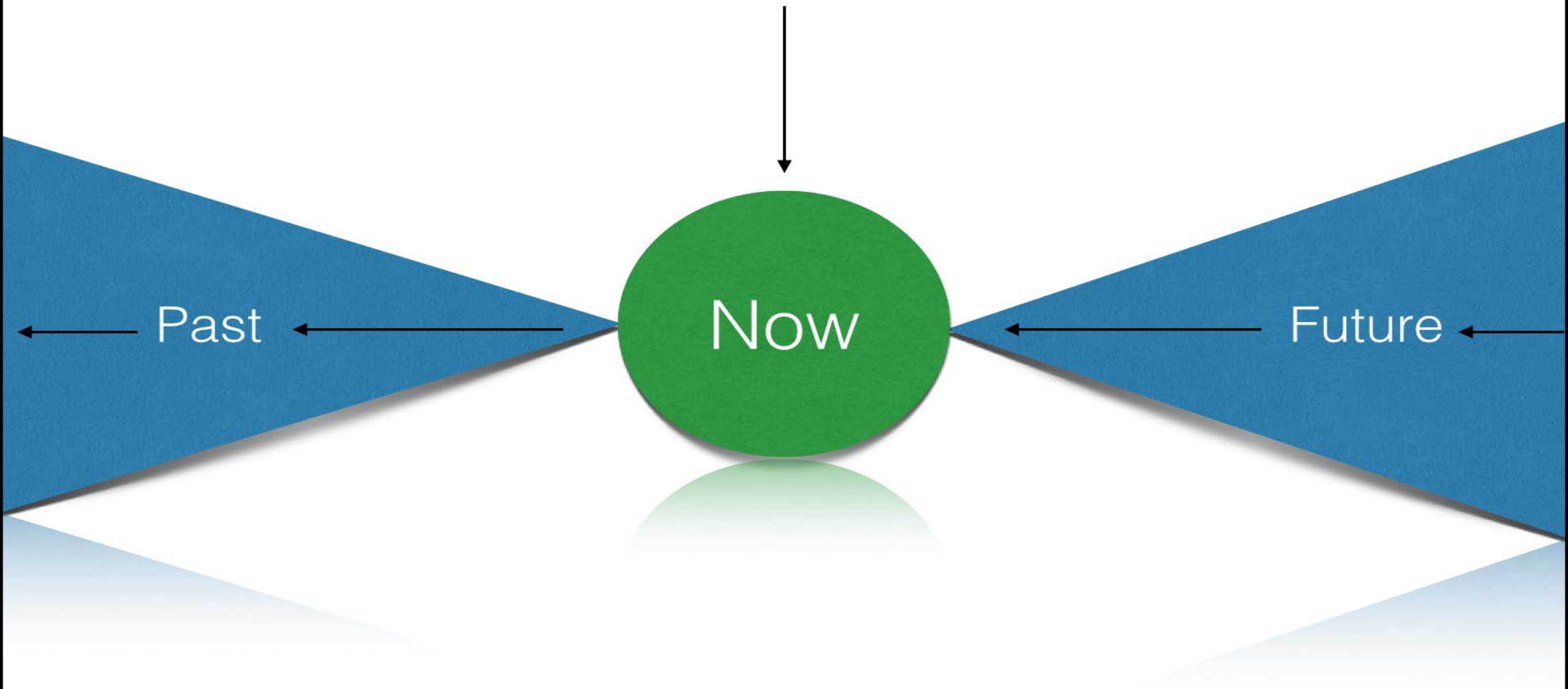
- How do you work efficiently and effectively
- What are the tools you need
- We can always work smarter

Is it really possible to manage time?

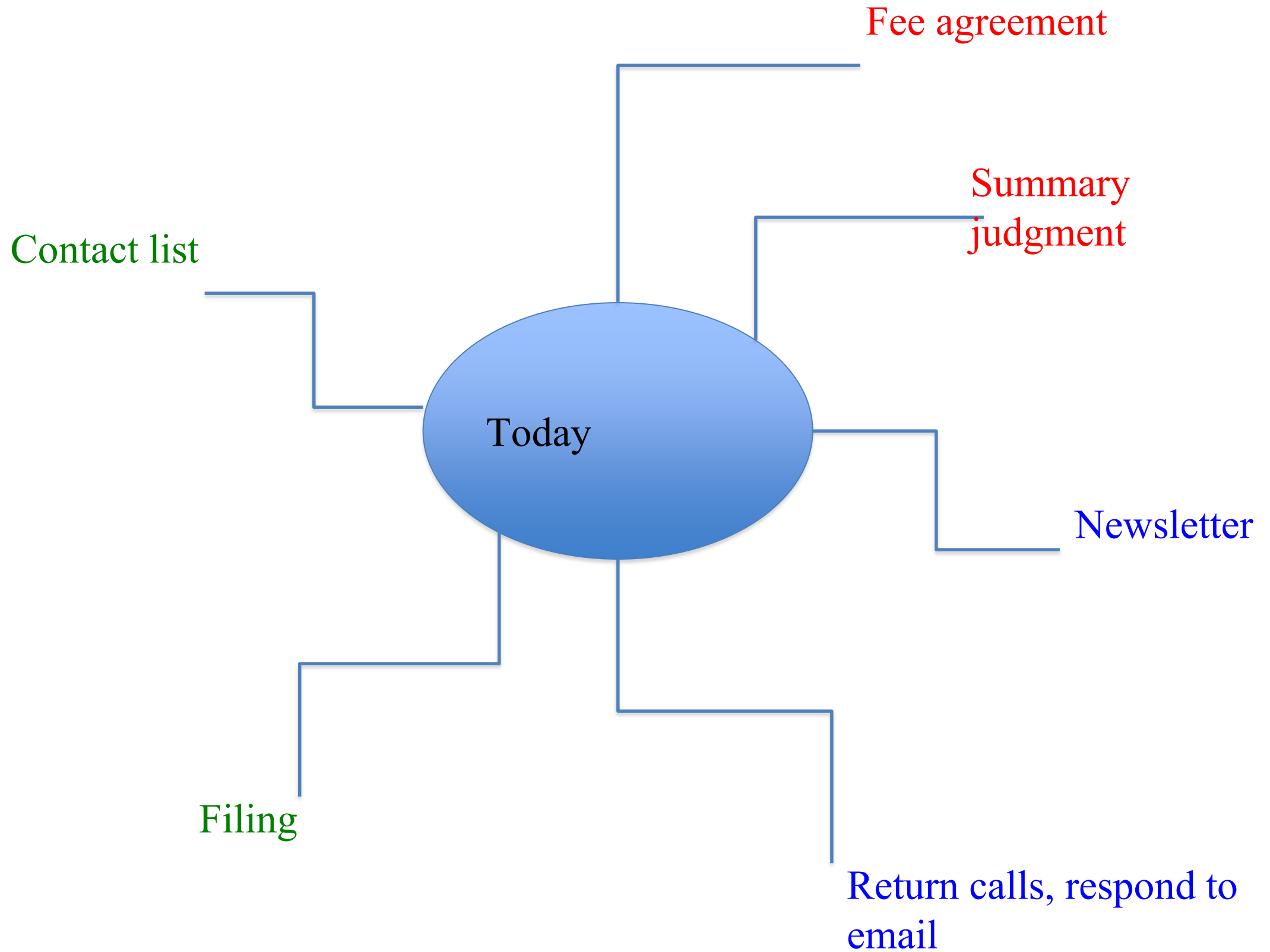
When people & projects compete for your time:

- Works in blocks of time with a single goal
- Employ self-discipline & focus
- Avoid *Chronic Reaction Syndrome*
- Avoid *Distractions of Doom*

The only moment for action or omission



A concept map for the next three hours



To clear your head, to get focused, ask yourself:

Why am I here?

What's going on around me?

What am I going to do about it?

How will my actions affect others?

Manage information

- Information is power; create a system for managing it
- A paperless system can mean productivity and efficiency for the small firm if it is managed well and used by all
- Ideally, be able to access all client and firm data from your device

Working smarter helps avoid:

Undervaluing your work

Procrastinating

Living with disorganization

Giving away time

Discounting fees

Accepting clients who cannot pay

Handling too many non-lawyer tasks

Only working in your enterprise & not on your enterprise

Catastrophizing

How to make a good impression & get clients

LISTEN

L = laser focus on the target

I = investigate the target

S = shun judging

T = take brief notes

E = elevate the target

N = Note non-verbal messaging

1,440

Everything and everyone comes
and goes
and maybe comes again
except time.

Your competition may be
smarter
richer
and better looking,
but they have the same
amount of time
as you.

Every day

Set your most important task

Do creative work first

Do reactive work second

Schedule time
for the most important task

Design your ideal week
in blocks of time
on your calendar

Keep a journal

Self-evaluate

It does not have to be perfect

The paperless system. . .

- One or more computers & a Fujitsu Scansnap
- RocketMatter, MyCase, Clio, NetDocuments or LegalWorkspace
- [Going Paperless-A Practical Guide](#)
- [ScanSnap demo](#)

FUJITSU Document Scanner ScanSnap



ScanSnap scanners take the complication out of document imaging with one-button ease of use. Perfect for home and small business environments, the ScanSnap family of scanners bring duplex multi-sheet scanning to everyone, combining performance and affordability in a compact size.

ScanSnap iX500

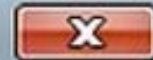


ScanSnap iX100



[ScanSnap products](#)

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Scan to Print



Scan to Mobile



Scan to
Dropbox



Scan to
Evernote (Doc...)



Scan to
Evernote (Note)



Scan to Google
Docs(TM)



Scan to
Salesforce C...



Scan to
SugarSync



ABBYY Scan to
Word



ABBYY Scan to
Excel(R)



ABBYY Scan to
PowerPoint(R)



Scan to
SharePoint



Scan to Picture
Folder

Detail



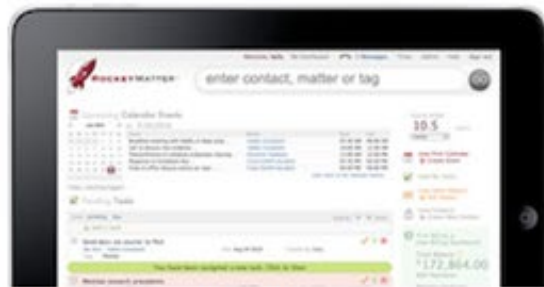


Legal Software with E-mail Integration

Effortless e-mail integration allows you to quickly associate correspondence with matters & track billable time.

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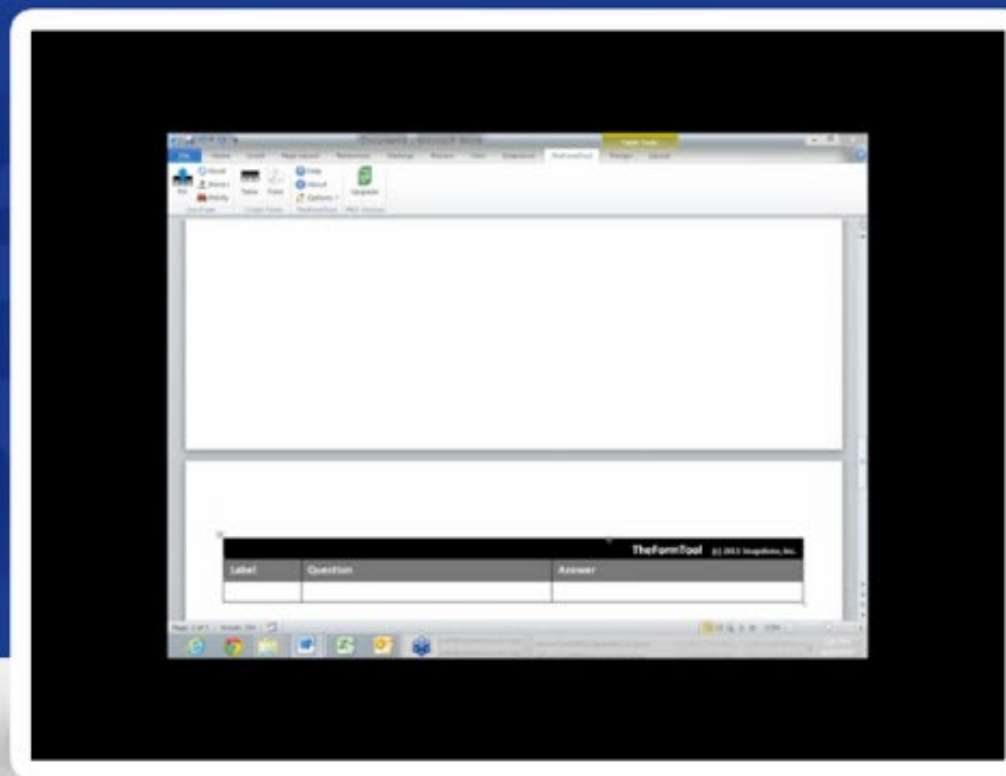
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*Pamela S. Wynn MSW, JD
Boynton Beach, FL*

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capital is human.