Basic Training & Beyond

March 6, 2021

Is this right for me?

Getting started.

The business of the small firm.

Managing risk.

Afternoon session

Client relations.

Productivity & technology.

Marketing.

1,352,027 US licensed attorneys

182,296 in New York State

170,117 in California

110,385 in the DC Bar

91,244 in Texas

78,448 in Florida

MEMBERSHIP

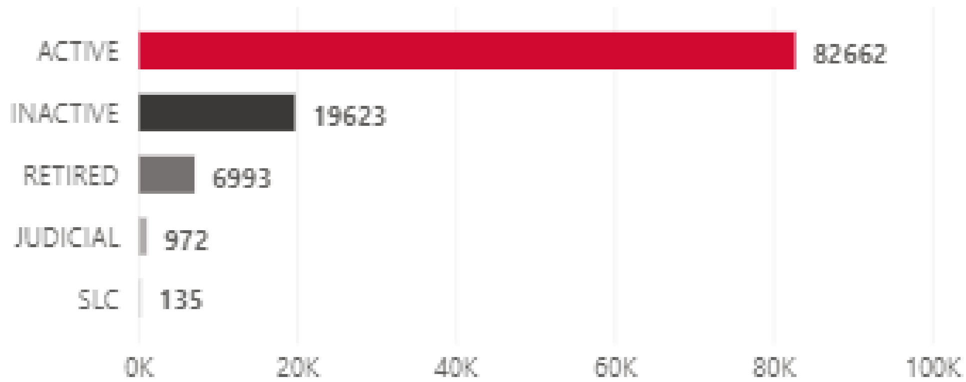
February Distribution Report

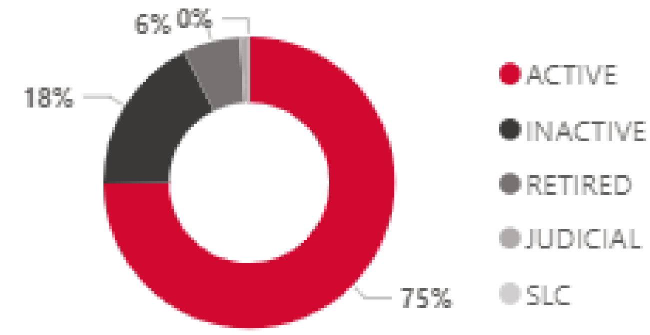
DC Bar Membership Population

Queried 3/1/2021

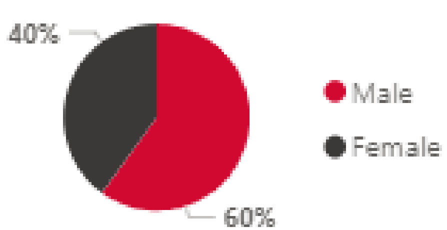
Marginal discrepancies may exist due to the availability of data.

110385

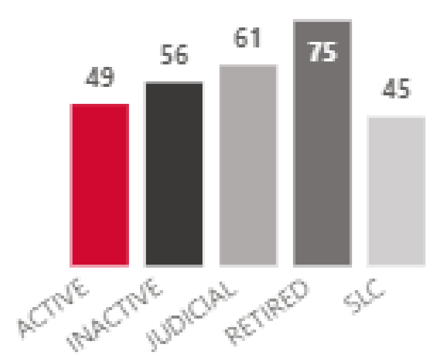




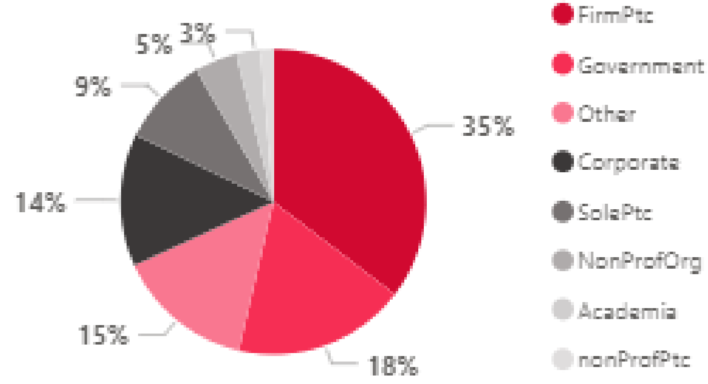
Gender Breakout



Average Age



Practice Industry



Is small firm law for me?

It’s a tough economy

It’s a tough profession

Competition is intense

Expect an abundance of
challenge & adventure

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	41	48	10	1	*	*
Medical doctors	27	50	19	2	1	*
Grade school teachers	26	49	17	5	2	*
Pharmacists	20	51	23	4	1	*
Police officers	16	36	30	11	7	*
Judges	9	34	40	12	4	1
Clergy	10	29	41	11	4	4
Nursing home operators	8	28	43	15	4	1
Bankers	5	24	48	16	5	*
Journalists	6	22	31	18	22	1
Lawyers	3	18	48	24	6	*
Business executives	2	15	46	26	10	1
Advertising practitioners	1	9	45	31	12	1
Car salespeople	1	7	53	29	8	*
Members of Congress	1	7	29	39	24	--

GALLUP, DEC. 1-17, 2020

Historical view 1976 - 2017

9th most dishonest in this MoneyWise survey

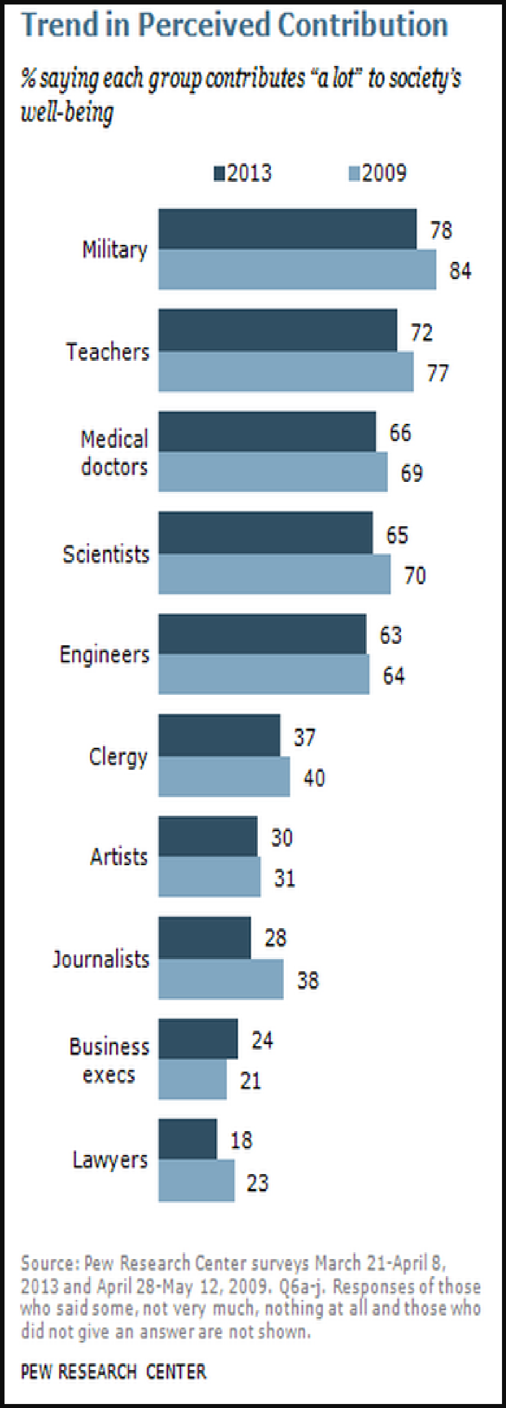
Lawyers

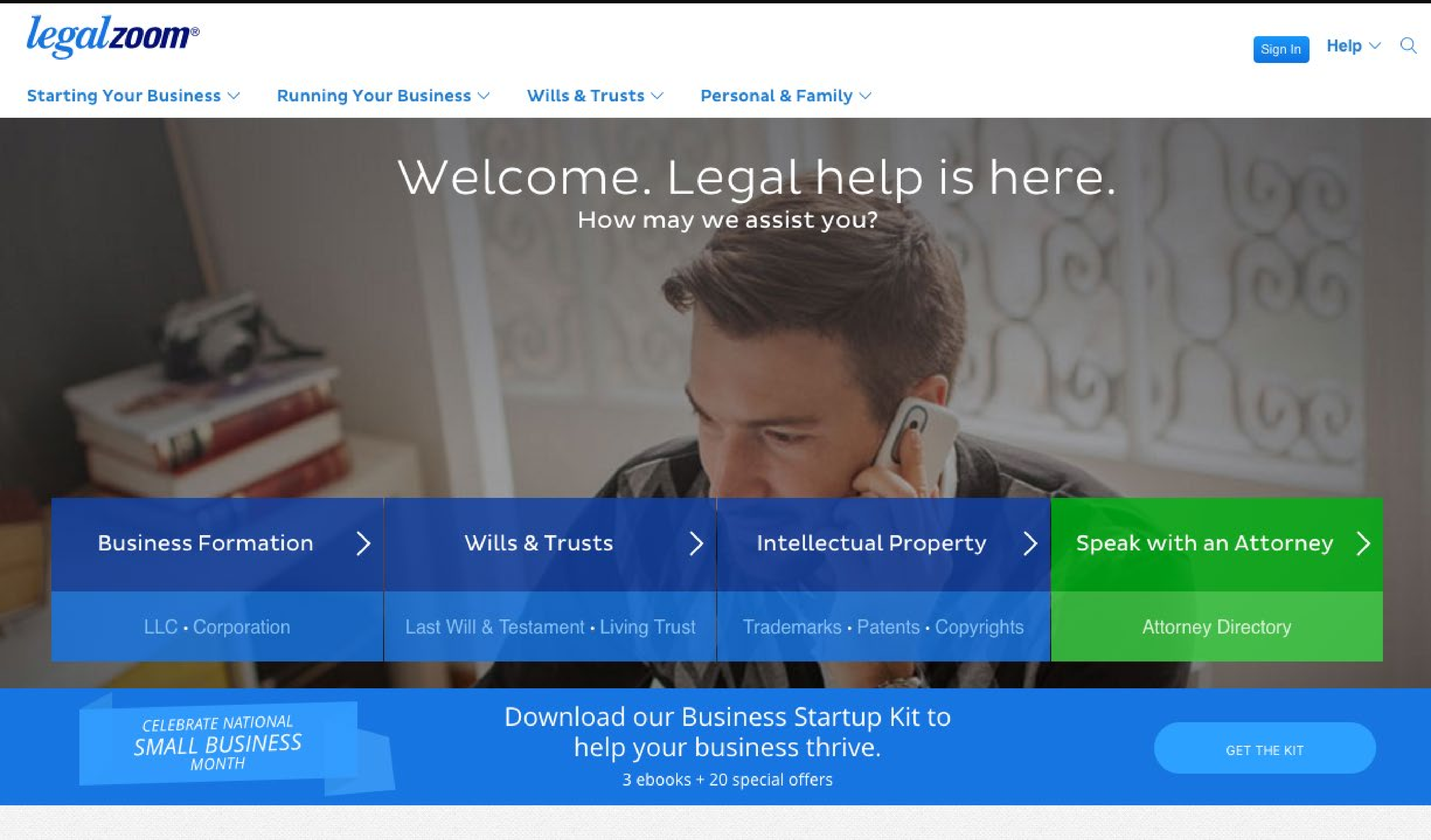
	Very high	High	Average	Low	Very low	No opinion	Very high/High
	%	%	%	%	%	%	%
2019 Dec 2-15	4	18	49	19	9	*	22
2018 Dec 3-12	3	16	51	21	7	1	19
2017 Dec 4-11	4	14	53	19	9	1	18
2016 Dec 7-11	3	15	45	26	11	1	18
2015 Dec 2-6	4	17	44	25	9	1	21
2014 Dec 8-11	5	16	45	22	12	1	21
2013 Dec 5-8	3	17	45	23	12	1	20
2012 Nov 26-29	4	15	42	28	10	1	19
2011 Nov 28-Dec 1	3	16	43	27	10	1	19
2010 Nov 19-21	4	13	47	24	11	1	17
2009 Nov 20-22	3	10	45	28	12	1	13
2008 Nov 7-9	3	15	45	25	12	1	18
2007 Nov 30-Dec 2	2	13	49	25	10	1	15
2006 Dec 8-10	3	15	42	27	11	2	18
2005 Nov 17-20	3	15	46	25	10	1	18
2004 Nov 19-21	4	14	45	24	11	2	18
2003 Nov 14-16	3	13	47	25	11	1	16
2002 Nov 22-24	2	16	45	25	10	2	18
2001 Nov 26-27	4	14	50	23	8	1	18
2000 Nov 13-15	3	14	42	29	11	1	17
1999 Nov 4-7	1	12	45	28	13	1	13
1998 Oct 23-25	3	11	44	29	12	1	14
1997 Nov 6-9	3	12	41	31	10	3	15
1996 Dec 9-11	3	14	39	27	14	3	17
1995 Oct 19-22	4	12	36	29	17	2	16
1994 Sep 23-25	3	14	36	31	15	1	17
1993 Jul 19-21	3	13	41	28	13	2	16
1992 Jun 26-Jul 1	3	15	43	25	11	3	18
1991 May 16-19	4	18	44	21	10	5	22
1990 Feb 8-11	4	18	43	22	9	4	22
1988 Sep 23-26	3	15	45	23	10	4	18
1985 Jul 12-15	6	21	40	21	9	3	27
1983 May 20-23	5	19	43	18	9	6	24
1981 Jul 24-27	4	25	41	19	8	7	25
1977 Jul 22-25	5	21	44	19	8	4	26
1976 Jun 11-14	6	19	48	18	8	1	25

GALLUP

Contribution to society’s well-being

We are last ->




legalzoom®
Sign In
Help
Starting Your Business
Running Your Business
Wills & Trusts
Personal & Family
Welcome. Legal help is here.
How may we assist you?
Business Formation
LLC • Corporation
Wills & Trusts
Last Will & Testament • Living Trust
Intellectual Property
Trademarks • Patents • Copyrights
Speak with an Attorney
Attorney Directory
CELEBRATE NATIONAL
SMALL BUSINESS
MONTH
Download our Business Startup Kit to
help your business thrive.
3 ebooks + 20 special offers
GET THE KIT

Is Amazon a competitor?

amazon Brand Registry Transparency Project Zero IP Accelerator Progress Report

FAQ Contact us Get started

amazon IP Accelerator

Protect your intellectual property

Amazon IP Accelerator helps businesses more quickly obtain intellectual property (IP) rights and brand protection in Amazon's stores.

Get started

Demand for small firm services is at an all time high

The challenge for the small firm lawyer is to:

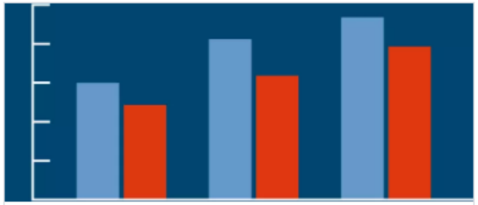
Find the right problems

&

Get paid for solving them

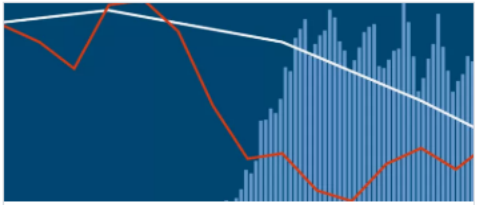
How do you respond to a prospective client who shows up with this?

The time we are in



Clio's COVID-19 Impact Research Briefing: July 15

Clio's third briefing on the impact of COVID-19 shows steady recovery in June across most practice areas and states. As coronavirus cases continue to rise in the US, the impact remains uncertain for July.



Clio's COVID-19 Impact Research Briefing: June 17

Clio's second briefing on the impact of COVID-19 shows several weeks of decreased business for law firms, which has affected monthly billing volumes. Initial data in June however shows a sharp increase in new caseloads...

Clio's COVID-19 Impact Research Briefing: May 4

Clio's first briefing on the impact of COVID-19 indicates that legal professionals have been significantly affected by social restrictions and that—despite the ongoing need for legal services—many firms are seeing reduced client demand.

Clio Legal Trends Report 2021

Clio Legal Trends Report 2020

Clio Legal Trends Report 2019

Here is the Ben Glass response to LegalZoom

Justice for Me

An affordable legal fee payment plan.

The lender’s fee is like that charged by a credit card processor.

But is this a Rule 5.4(a) issue?

Characteristics

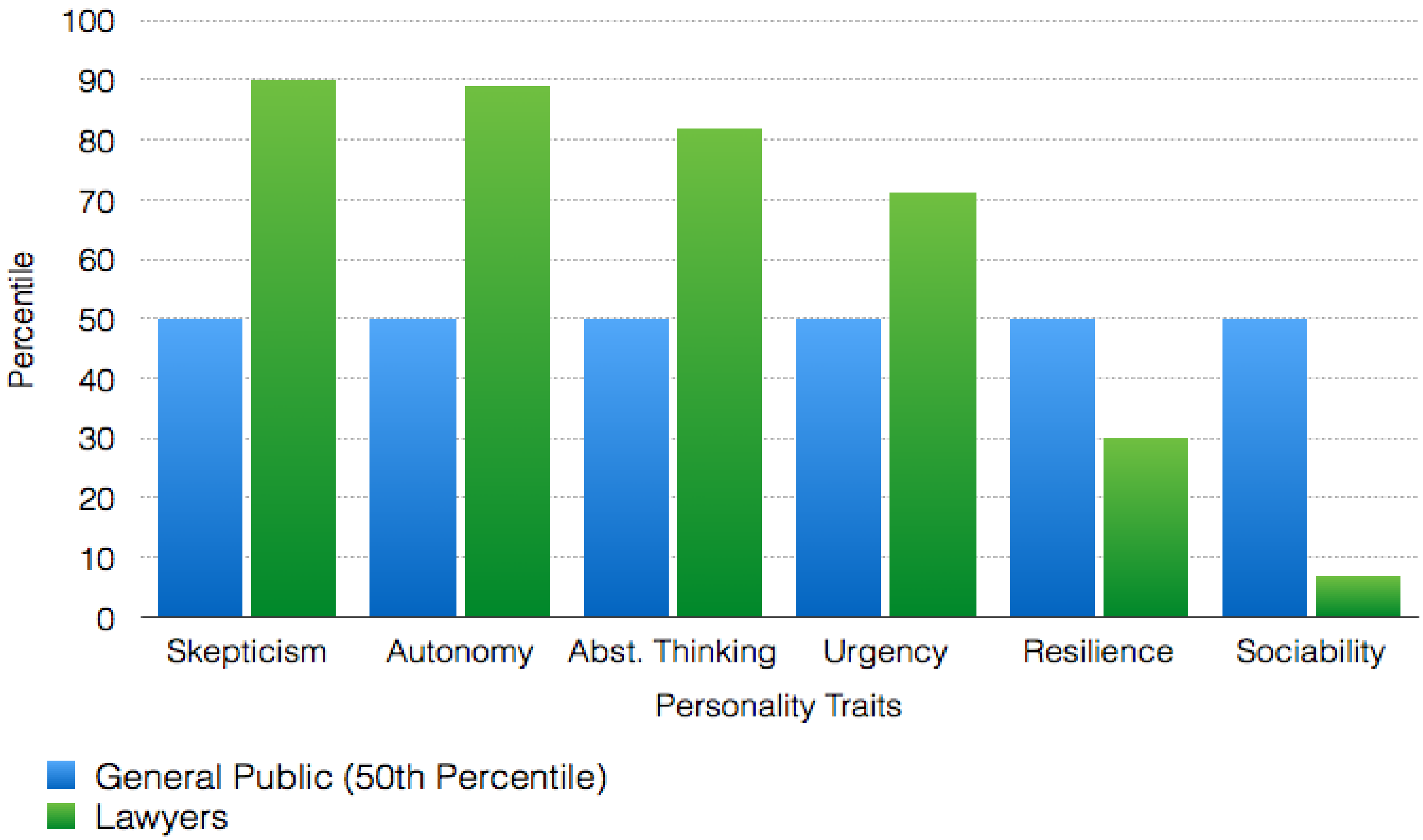
Are you empathetic?

Can you listen & observe?

Can you make the complex understandable?

Can you maintain boundaries?

The 6 Predominant Lawyer Personality Traits



From the research of Larry Richard, Ph.D.

Dr. Larry Richard / LawyerBrain.com

Small firm lawyers need high EQ (emotional intelligence)

What does high EQ look like?

High EQ Qualities

You are optimistic.

You are not a perfectionist.

You can balance work and play.

You embrace change.

You are not easily distracted.

You are empathetic.

You know your strengths & weaknesses.

You are self-motivated.

You don't dwell in the past.

You take care of yourself.

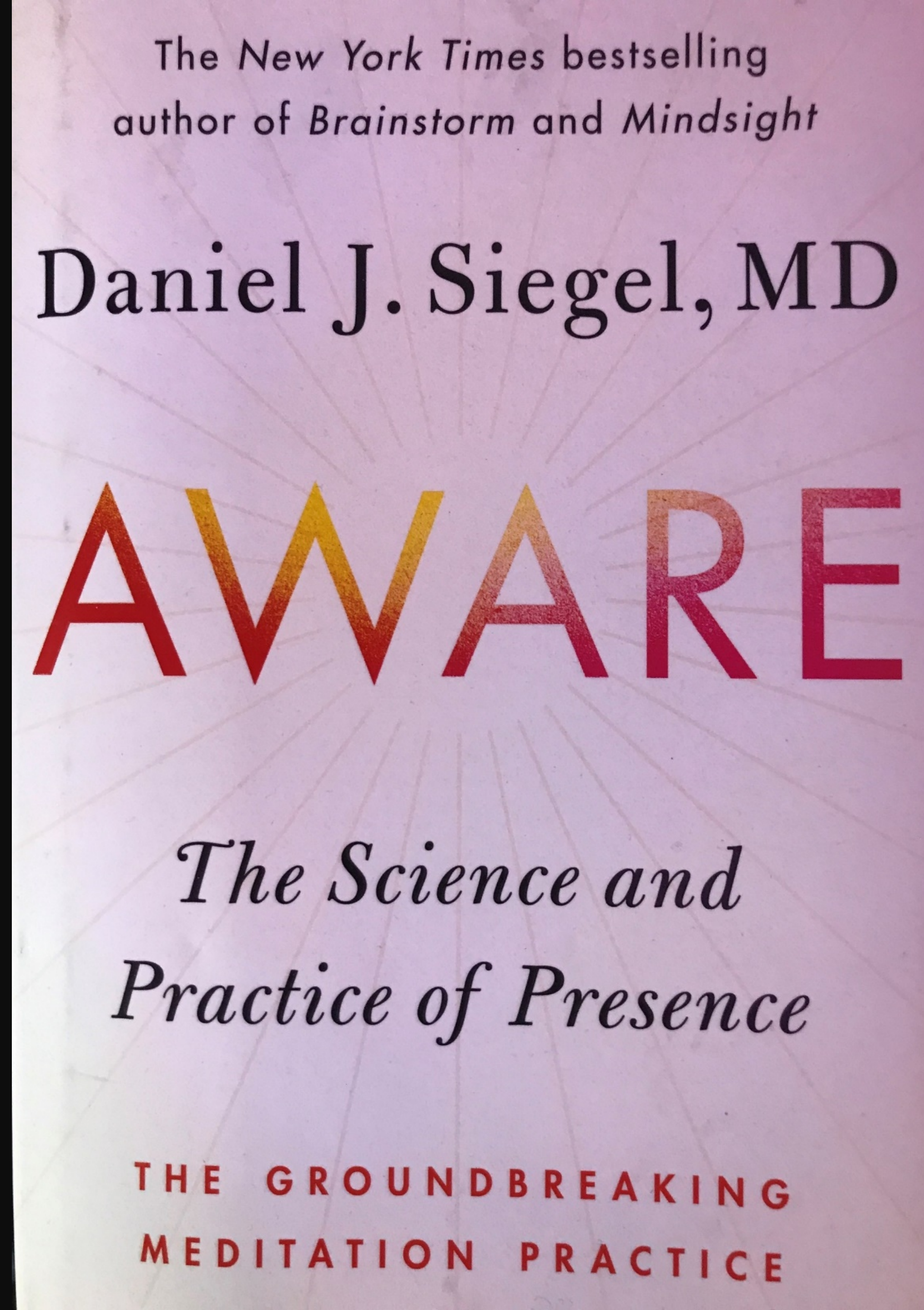
You set boundaries.

A person with EQ understand this truth:

You cannot impact a feeling with a fact.

You can only impact a feeling with another feeling.

A great resource to develop good decision making



Characteristics of the successful small firm lawyer

Are you an *idea* person & a *detail* person?

Can you work a room? Can you close?

Can you screen & talk about money?

Can you be selective about clients & cases?

Are you a life-long learner?

Empathy vs Sympathy

This video of Brene Brown explains the difference.

https://www.youtube.com/watch?v=1Evwgu369Jw

An empathetic person
is not afraid to be vulnerable

Here's a talk by Brene Brown on
the
power of vulnerability

Necessary skills

Active listener

Ability to negotiate

Effective writer

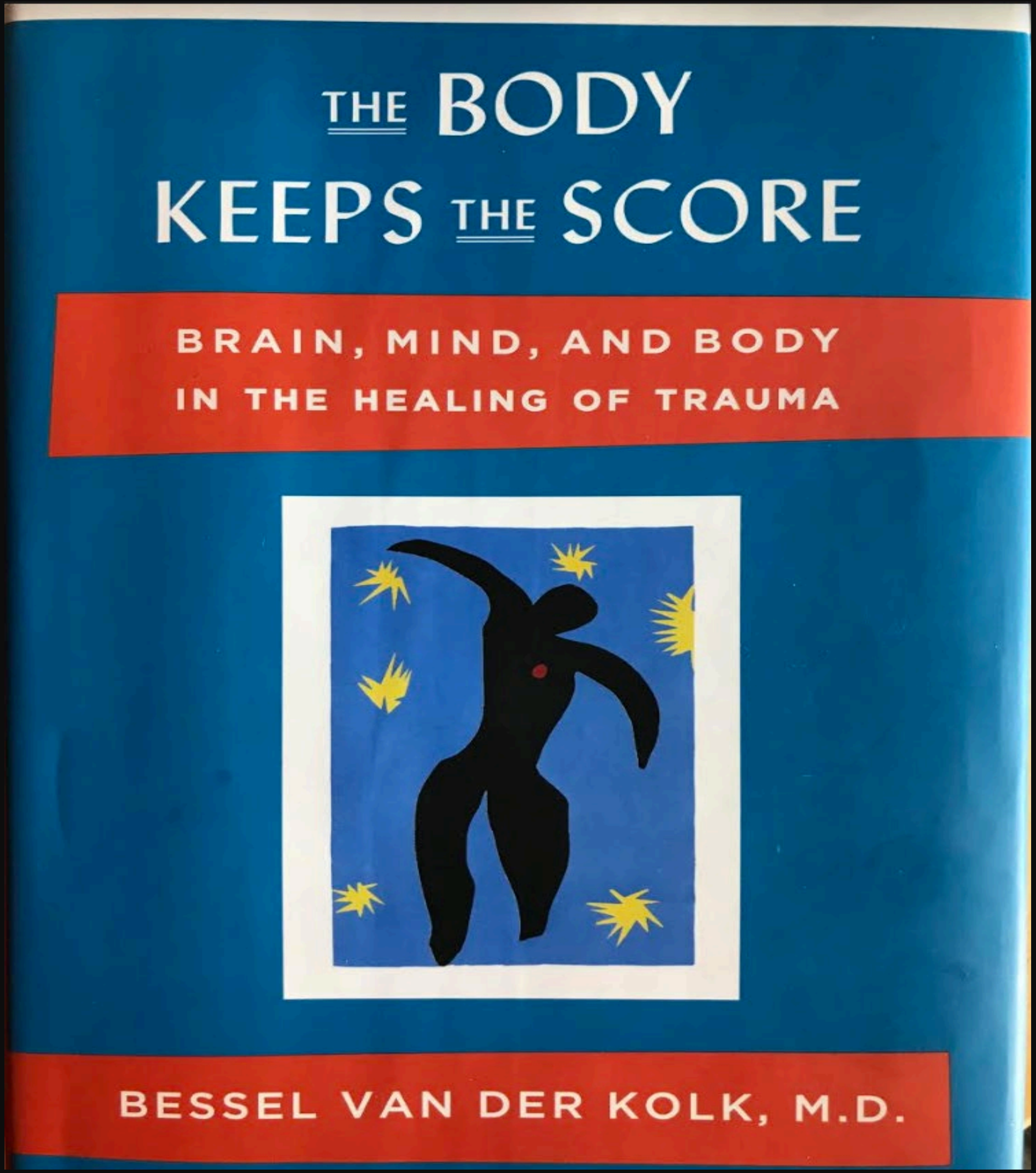
Good speaker

Ability to adapt

Quick study

Solution oriented

If you have clients who have suffered trauma, this is a resource to understand how trauma affects a person



We are regulated

We must comply with the DC Rules of Professional Conduct;

And the rules of any other jurisdiction where we are barred;

And other codes, regulations and court rules;

And not become paralyzed by regulation.

Click here for free, confidential, informal ethics advice

We are DC Rule focused here

If you practice in another jurisdiction,

it may be different there.

For example:

DC Rule 7.1 & 7.5 – marketing

DC Rule 1.8(d)(1) & (2) – client financial help

DC Rule 5.4(b) – non-lawyer equity partner

DC Rule 1.6 – confidences & secrets

Getting started

What’s the problem you solve?

Why should a prospective client bring you into their life?

What is the skill set you need to attract and solve the problem of your ideal client?

Is it the same skill set?

Firm name

Rule 7.5 & 7.1

Avoid implying that you are more than you are

Using *Firm* is acceptable Ethics Opinion 332

Be cautious of and test drive the unique name

Unique name example: *Ipseity Law*

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

“Ipseity reminds me of my core self,

the me beneath all layers of adaptation & personality,

and that’s why I choose Ipseity Law for the

name of my small firm.”

The entity question

Know why you need an entity

Here are resources on forming a business in DC

Here is information from DCRA

Sole proprietor is an option

See *Choosing the Business Entity* at 29 of the e-Manual

Sole proprietors, partners & self employed persons pay estimated taxes

Your firm will need an EIN

[Apply to the IRS for an employer id number]

You will need an EIN to open your firm's business checking account

Avoid putting your SSN on a 1099 form

See page 31 in the e-Manual

[IRS Employee vs Contractor Guidelines]

Doing business in DC

Law firms do not need a business license from DCRA

You may need to file the FR 500 (e-Manual)

More information about the FR500 is here

Do you need an office in DC?

DC Rules do not require it

Be careful about an office in a jurisdiction where you are not barred

See e-Manual, page 35, for more information

The office should be client-focused

Is client data safe & secure?

Avoiding UPL

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

Every jurisdiction has its own UPL rule, regulation or code provision

See e-Manual - Avoiding the Unauthorized Practice of Law

When emails from Colorado became UPL in Minnesota

ABA Legal Ethics Opinion 495
Lawyers Working Remotely - 12/16/20

"The Committee's opinion is that, in the absence of a local jurisdiction's finding that the activity constitutes the unauthorized practice of law, a lawyer may practice the law authorized by the lawyer's licensing jurisdiction for clients of that jurisdiction, while physically located in a jurisdiction where the lawyer is not licensed if the lawyer does not hold out the lawyer's presence or availability to perform legal services in the local jurisdiction or actually provide legal services for matters subject to the local jurisdiction, unless otherwise authorized."

CARR WORKPLACES / DC Metro

Bethesda
4800 Hampden Lane
Suite 200
Bethesda, MD

Capitol Hill
300 New Jersey Ave NW
Suite 900
Washington, DC

City Center
1325 G Street NW
Suite 500
Washington, DC

Clarendon
3033 Wilson Boulevard
Suite 700
Arlington, VA

Duke Street
1765 Duke Street
Alexandria, VA

Dupont
1101 Connecticut Ave NW
Suite 450
Washington, DC

Friendship Heights
5425 Wisconsin Avenue
Suite 600
Chevy Chase, MD

Georgetown
1050 30th Street NW
Washington, DC

King Street Station
1800 Diagonal Road
Suite 600
Alexandria, VA

K Street
1717 K Street NW
Suite 900
Washington, DC

Old Town
500 Montgomery Street
Suite 400
Alexandria, VA

Pennsylvania Avenue
1701 Pennsylvania Ave
NW
Suite 200
Washington, DC

Reston Town Center
1818 Library Street
Suite 500
Reston, VA

Rosslyn
1001 19th Street North
Suite 1200
Arlington, VA

Tysons Boulevard
1750 Tysons Boulevard
Suite 1500
McLean, VA

The Willard Offices
1455 Pennsylvania Ave NW
Suite 400
Washington, DC

Plus 10 additional locations found across the United States.
Learn more at www.carrworkplaces.com/locations

OSI

Office Services Inc.

1629 K Street NW Suite 300

Washington, DC

20006

DC Bar Member Benefits

Carr WorkPlaces

Clio, MyCase, Zola

Fastcase

USI Affinity

Airbnb for office space

Breather.com

The law firm business plan

Planning gives your focus, control, & direction

You will have an edge over the competition

You will think about your law enterprise as a system

Planning reduces risk & increases reward

See the e-Manual, page 25

Request the plan template, workbook & spreadsheets:

PMAS@dcbar.org

Here is why the plan is essential

It raises issues you will not have considered

It helps you to think like an entrepreneur

It puts you in your ideal client's
problem recognition process

Build your network

Small firm support systems are important

Networking events & groups are vital

Mentoring can result

Referral networks are created

Resources are located

Informal groups, voluntary bars & Communities

And social media are some of the possibilities

Fees

How will you price your service?

Rule 1.5 says it must be *reasonable*

So you can profit, know what a productive hour is worth –

More in the e-Manual

Ask for the 168 hour time management spreadsheet

Time & effort are not necessarily value.

The client values the result.

Productive hour calculation

Monthly expenses X 12

$5k professional, $5k personal X 12 = $120,000.00

$120k / 50 weeks = $2400.00

$2400 / 5 days = $480.00

$480 / 3 productive hours each day = $160.00

(/ = divide)

Incorporating profit

$160.00 + $90 profit = $250.00 hourly rate

$250.00 X 3 productive hours a day = $750.00

$750.00 X 5 days = $3750.00

$3750.00 X 50 weeks = $187,500.00

$187,500 - $120,000 = $67,500.00 profit

Revenue – Expense = Profit

When the small firm does not intend to profit,

it is simply surfing cash flow.

Here is how to know <u>when</u> you are profiting:

Total Fixed Cost / (Matter Price – Cost) = Matters needed to break even

$5000 Fixed Cost (month) / ($1000 - $750) = 20 matters a month to break even

Revenue – Expense = Profit

Compare to a firm with more margin in the formula

\$5000 Fixed Cost (month) / (\$2500 - \$750) = 3 matters a month to break even

The best business model for getting paid

The Zips model works for the small firm

No inventory

Nothing perishable

Get paid up front

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 PLLC

The fee agreement

A plan for solving your client's problem

A plan for getting paid

Rule 1.5(b) requires a writing covering the scope, fee & expenses

A contingent fee "agreement" is required as is a written statement of the outcome - Rule 1.5(c)

The best practice

Create a client-friendly contract that complies with Rule 1.5 and Rule 1.15 (when necessary)

Address other important issues like how you will communicate, what is expected of the client & what happens to the file

The e-Manual covers other terms

Request sample forms at PMAS@dcbar.org

Limited Scope Opportunity

D.C. Superior Court has issued Admin Order 14-10 allowing limited appearances in these divisions:

Civil

Probate

Tax

Family

Domestic Violence

RPC 1.2 has been amended.

See more in the e-Manual for forms.

Bar Complaint Form

It asks this question regardless of the nature of the complaint:

D. Do you have a written retainer agreement with the attorney? If yes, please attach a copy.

There is no exception in Rule 1.5 for a client who is pro bono, court appointed, friend or family

Small firm bank accounts

The firm's business account (operating account)

DC IOLTA, assuming there are IOLTA eligible funds

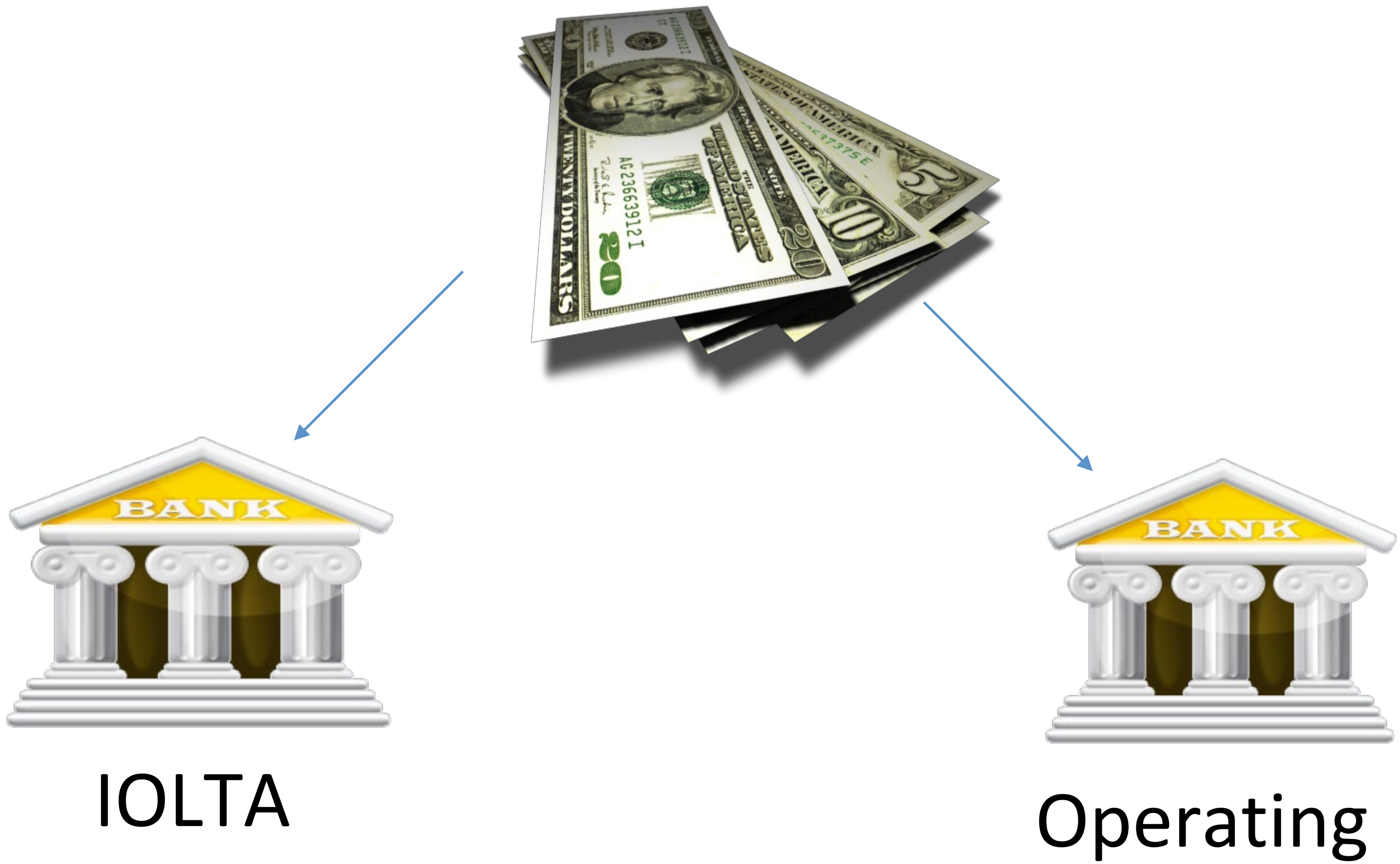
Trust Account for a single client or case, assuming the need exists

What goes where?

If you have done the work and earned the money, it goes into the business or operating account.

When it is an advance fee, when you are paid before you have done the work, when you have not yet earned the money, it goes into the IOLTA, assuming it is nominal in amount or going to be held for a short time.

Managing Money



So where does the money go?

If the Fee is an …

Advance Fee/Expense
or Settlement

It goes in your…

IOLTA Account

With the advance fee in the IOLTA,

then you….

Perform the work

Send invoice

And then…

Recovered funds in a contingency fee matter

- Check is deposited into the firm's IOLTA
- Wait for the check to clear
- When funds are available, distribute according to the fee agreement and claims of valid third parties

Transfer the attorney fee pursuant to your fee agreement …

From

To

IOLTA

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!**

Law firm Money

NEVER

IOLTA Account

Except....

You can only put law firm 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
- Advance flat fees go into the IOLTA
- 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

Elements of good trust account management:

Advance fees (flat, fixed or hourly) are entrusted (DC IOLTA);

Keep a client ledger for each client’s money held in trust;

Include a summary of a client’s trust funds in the invoice;

Use the three-way trust account reconciliation spreadsheet.

e-Manual, Chapter 5, Trust Accounting

Use the DC IOLTA Registration Form to open an IOLTA at an IOLTA compliant bank

Most advance fees are IOLTA eligible because they will not earn net interest for the client

Name your IOLTA properly (Rule 1.15(b)) Example:
Daniel M. Mills Lawyer DC IOLTA, or
The Mills Firm DC IOLTA

IOLTA Exceptions / Rule 1.15

"... when the lawyer is otherwise compliant with the contrary mandates of a tribunal ..."

If you are licensed, principally practice & are IOLTA compliant in another jurisdiction. Rule 1.15(b)

"... unless the client gives informed consent to a different arrangement." Rule 1.15(e)

The problem with “informed consent to a different arrangement”

The Rules don’t explain it

There is no case that sets out the elements

After In Re Mance, Disciplinary Counsel is waiting on the right set of facts to establish the elements. It may be coming in In Re Ponds

Waiver of entrustment is high risk conduct

What we think we know about informed consent to waiver of entrustment

Orally & in writing the client agrees that:

1. Advance fees are normally entrusted;
2. Un-entrusted fees are treated as the lawyer's property;
3. Lawyer must explain the service & do the work to earn the fee;
4. Unearned fee must be returned to the client;
5. Un-entrusted fees are subject to the lawyer's creditors.

Credit Card Payments

Be certain the payment goes into the right law firm account

LawPay is a new DC Bar member benefit for credit card processing

LEO 348 Accepting Credit Cards for Payment of Legal Fees

The charge back risk & credit card provisions for fee agreements: request at PMAS@dcbar.org

Bank account record keeping

Maintain complete records for tax purposes;

Maintain complete records for trust account purposes (Rule 1.15(a);

"Complete records" tell the full story of how the lawyer handled the money and whether the lawyer followed the Rules – *In Re Clower, 831 A. 2d 1030, DCCA 2003*

Include supporting data

The law firm bank statement

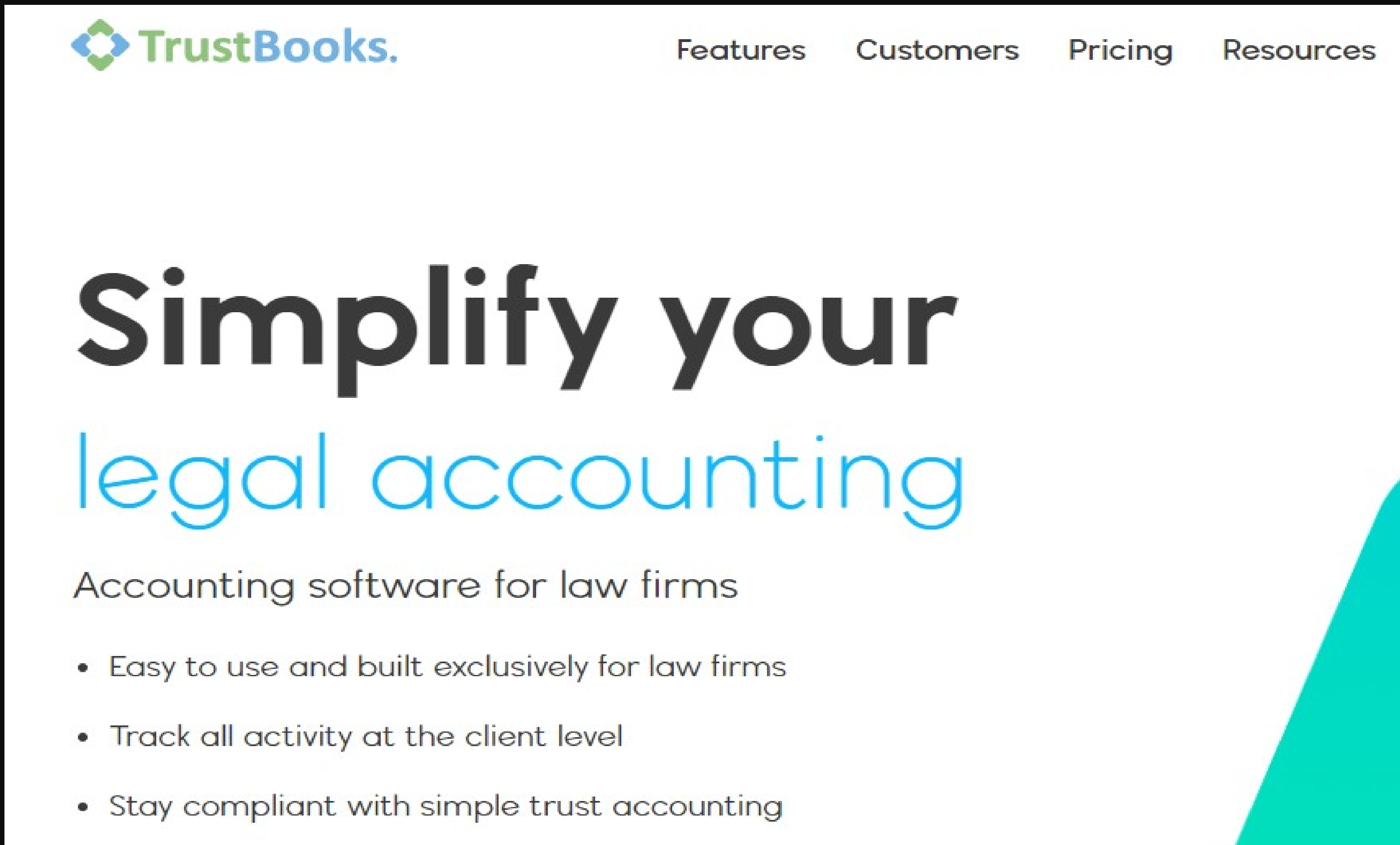
Should only be opened or accessible by you;

Should be examined regularly;

Never delegate this task regardless of how big, busy & successful you become;

Only delegate financial duties after your thorough review of the bank statement;

Reconcile the bank statement with your trust account ledger & client ledgers.


TrustBooks.
Features
Customers
Pricing
Resources
Simplify your
legal accounting
Accounting software for law firms
• Easy to use and built exclusively for law firms
• Track all activity at the client level
• Stay compliant with simple trust accounting

TrustBooks

Managing the small firm

A system for the paper & digital data

A system for time & dates

Invoicing & handling money

Work flows & procedures in your office

e-Manual, Chapter 8, Office Management

Tracking your work

Whether you charge for time or results, you need to know what you are doing & where you are spending your time

Useful tools: time59.com Timeslips Clio Timesolv

Clio is a DC Bar member benefit

Ask for the 168 hour time management spreadsheet at PMAS@dcbar.org

Invoicing

It starts in your initial consultation

It should be described in the fee agreement

It should be tied to value

It should involve a highly functional system in your law office

Invoices that show progress get paid

e-Manual, Chapter 6, Billing Practices

Project management

Keeping track of every prospective client, engaged client, administrative & marketing initiative in your law firm

Start with the Case & Action Manager spreadsheet; request from PMAS@dcbar.org

Migrate to Clio

Backup systems for the small firm

Backup your data either to a safe, encrypted external hard drive, and/or

Backblaze Carbonite or similar service.

To be really safe, clone your hard drive.

Glyph are best.

Get a backup for yourself; avoid DC App. R. XI, Section 15(a); comply with R. 1.3, Comment 5

Use *Being Prepared – see the eManual*

Ask for the *Agreement for Emergency Backup Services*

from PMAS@DCBar.org

When you need help

The *Of Counsel* arrangement; requires a close & ongoing relationship between the lawyer & firm;

Rule 1.10: the conflicts of the *of counsel* lawyer and of the firm are imputed to each other;

Washington Lawyer, Speaking of Ethics, Of Counsel

Page 14

Managing client data

Whether you are paper oriented, paperless or a combination, the process starts with:

Rule 1.6 Confidentiality of Information

Know where the data is & that it is secure.

Should it be password protected & encrypted?

Who has access to the data?

Managing the risk

While the DC Rules do not require malpractice insurance, it is best to be covered

An entity will not protect you

Rule 1.8(g) bars a prospective limitation on a lawyer's liability for malpractice

e-Manual, Malpractice & Insurance

USI Affinity, DC Bar Member Benefit

The disciplinary system in DC

This is a consumer oriented disciplinary culture

Small firms are 10% of the DC Bar & generate nearly 50% of the docketed bar complaints

OBC statistics tell us to manage & communicate to avoid bar complaints

Evaluating your enterprise

Record what you learn as a part of your business plan

Get client feedback on their experience with your firm

Get a free, confidential assessment of your firm's operation from the
Practice Management Advisory Service

Here's what to ask

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

Resources from the DC Bar

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

Small Law Misconceptions

- It takes a lot of money
- It's easy and for everyone
- It's for those who can't get a job
- Everyone I know will send me business
- Working two or more practice areas is best
- It's something to do until I find a job
- You can't turn anyone away

Posted by this D.C.lawyer 12/2/20 on Linkedin

Shahed Kader • 2nd
Attorney for Software Businesses, Former SaaS Sales Leader.
5h •

It's officially been 18 months since I went full time running my law practice. Here are 6 things I have learned:

1. Being in a niche is good. Doing a group of specific things for a specific type of client REALLY well can be better than doing a bunch of things kind of well. I focus on transactional law for software companies.

2. Not all types of marketing/advertising works for everyone. For example, my clients aren't looking for my services on Facebook and Instagram. They're Googling, asking colleagues, or looking on LinkedIn.

3. Educating people is key - through content, webinars, or podcasts. Share knowledge to build trust.

4. Stand firm in your worth - prospective clients will come and try to negotiate down rates and claim they're getting a better deal elsewhere - but you are better served holding your ground. Those looking for deals aren't going to be great clients.

5. My best, most consistent clients have come to me organically - through word of mouth, or just finding my content in Google or LinkedIN.

6. Mental health is really important. I knew this before, but the stresses of being an entrepreneur are amplified in a pandemic. Meditate, seek therapy, and do what you can to maintain your inner peace.

The lessons keep on coming, and I keep on learning. Onward!


Marketing
is
everything

Marketing

Applicable Rules:

7.1

7.5

Codes, regulations & other jurisdictions can also apply.

Example:

Bergman v District of Columbia

DC Court of Appeals 08-CV-859

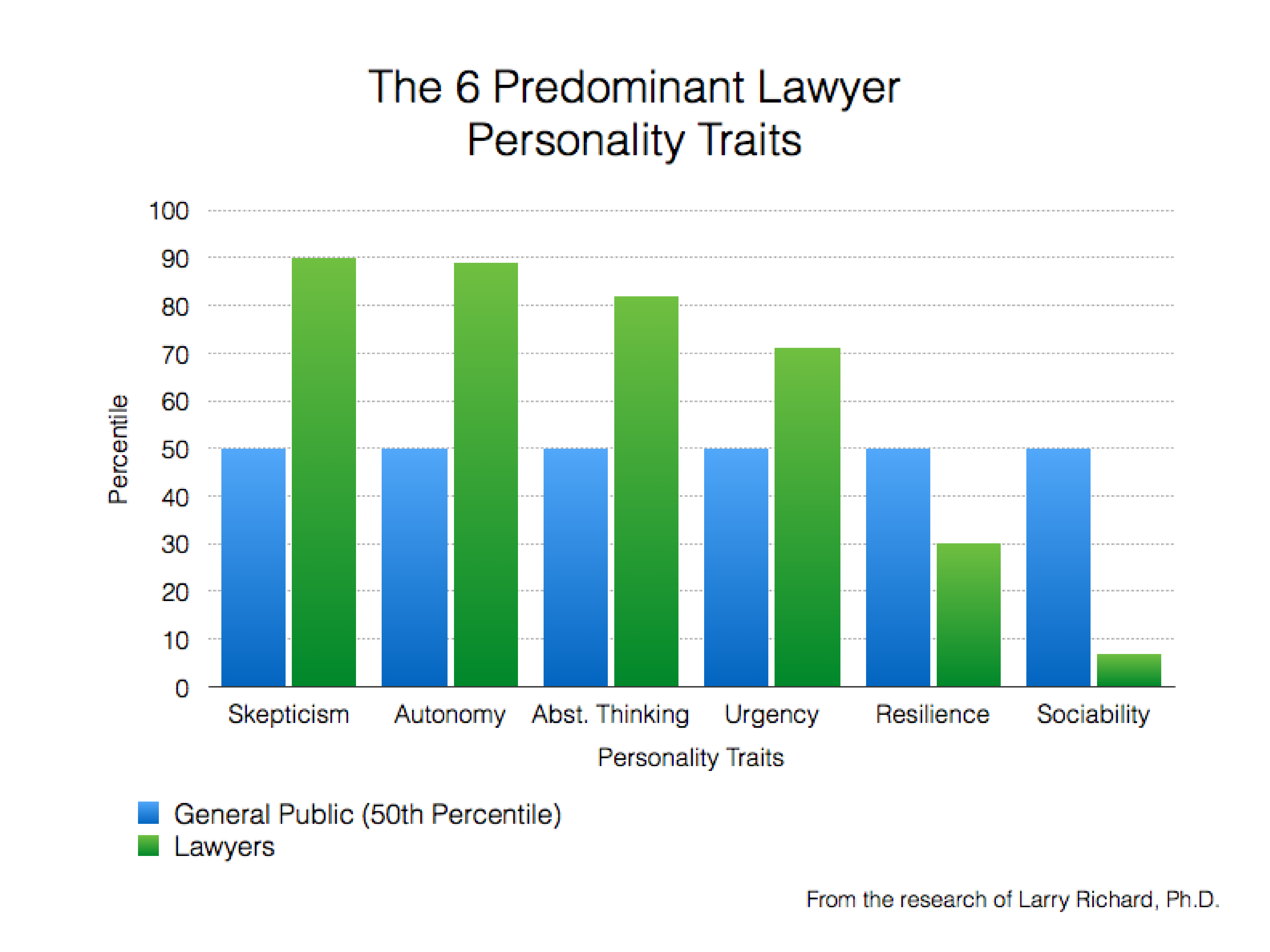
The first step . . .

Start from what is real & true.

I act
on the basis
of my
self-image.

Own who you are.

Own where you are.



The 6 Predominant Lawyer Personality Traits
100
90
80
70
60
50
40
30
20
10
0
Percentile
Skepticism
Autonomy
Abst. Thinking
Urgency
Resilience
Sociability
Personality Traits
General Public (50th Percentile)
Lawyers
From the research of Larry Richard, Ph.D.

Our choice . . .

-to talk about us

or

-to talk about the problem we solve

A marketing truth . . .

You cannot impact a feeling with a fact.

You can only impact a feeling with another feeling.

Nobody Wants What You're Selling

Lee Rosen

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

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

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

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

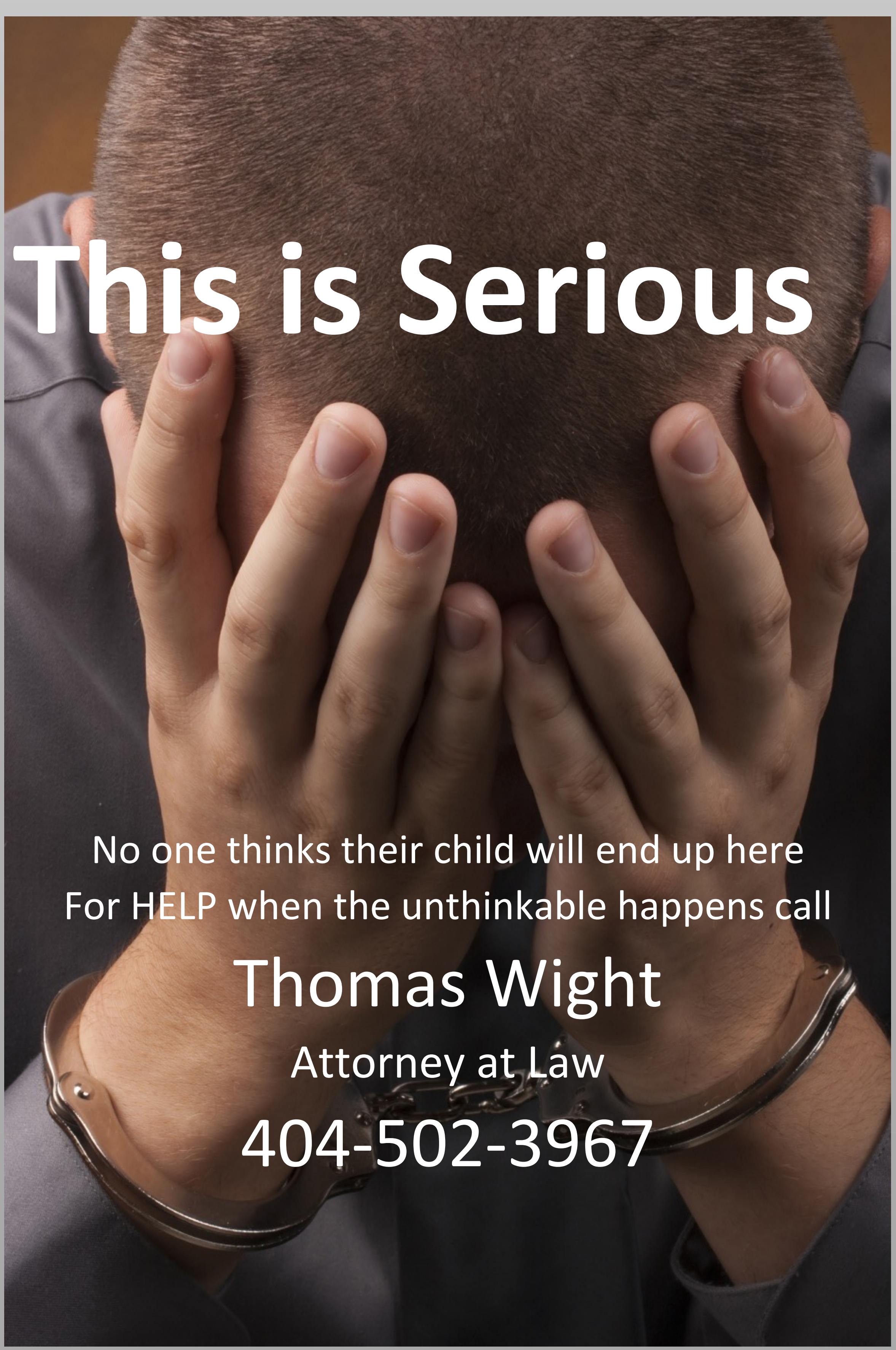
For the full article, click here

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?
- *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?

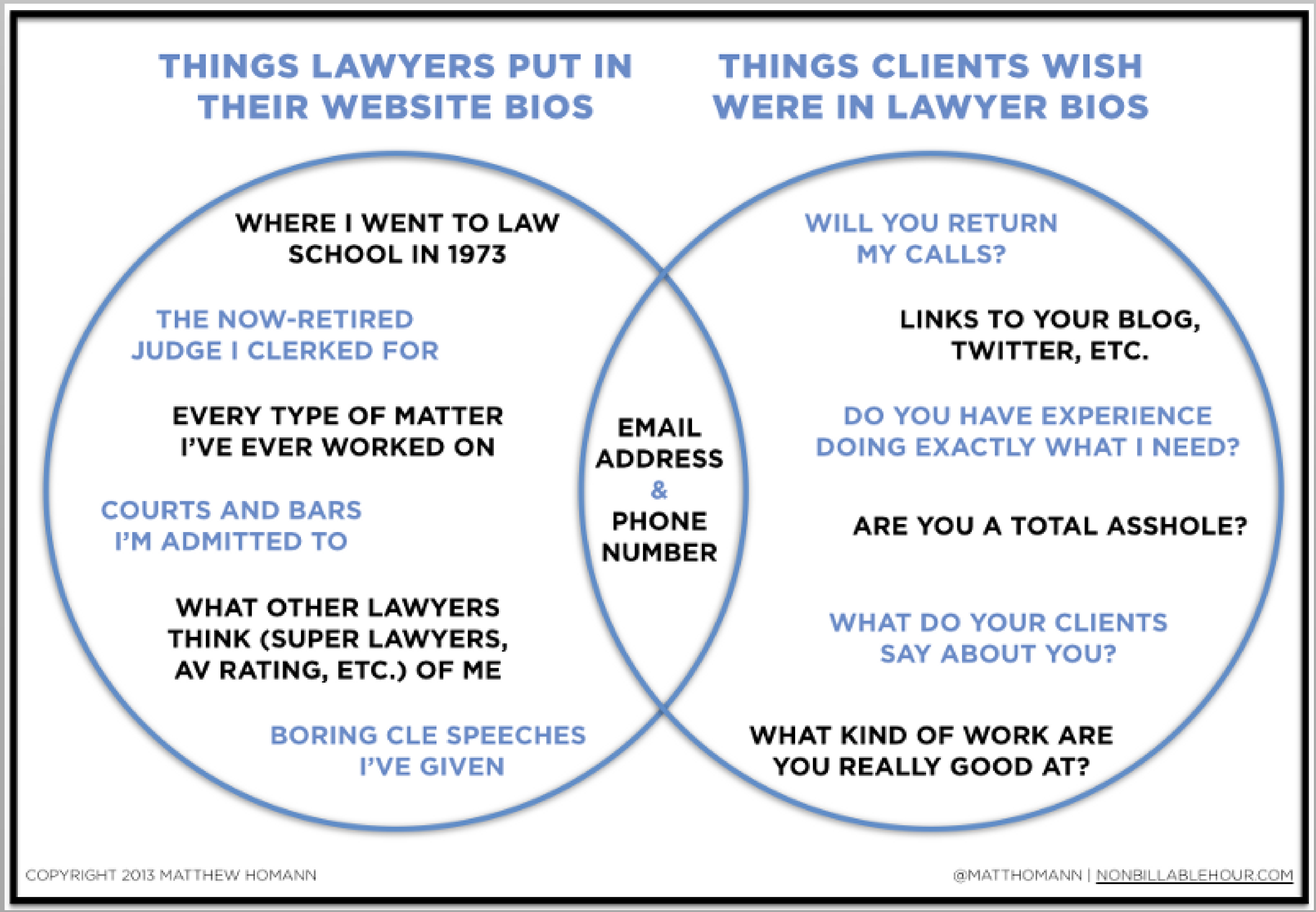
What is the best way for us to communicate?

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.

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
WHERE I WENT TO LAW SCHOOL IN 1973
THE NOW-RETIRED JUDGE I CLERKED FOR
EVERY TYPE OF MATTER I'VE EVER WORKED ON
COURTS AND BARS I'M ADMITTED TO
WHAT OTHER LAWYERS THINK (SUPER LAWYERS, AV RATING, ETC.) OF ME
BORING CLE SPEECHES I'VE GIVEN
EMAIL ADDRESS & PHONE NUMBER
WILL YOU RETURN MY CALLS?
LINKS TO YOUR BLOG, TWITTER, ETC.
DO YOU HAVE EXPERIENCE DOING EXACTLY WHAT I NEED?
ARE YOU A TOTAL ASSHOLE?
WHAT DO YOUR CLIENTS SAY ABOUT YOU?
WHAT KIND OF WORK ARE YOU REALLY GOOD AT?
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@MATTHOMANN | NONBILLABLEHOUR.COM

What every prospective client needs to know & feel:

Why do I need a lawyer?

Do you know what you are doing?

What do others think about you?

Are you right for me?

Can I work with you?

Will you 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

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.

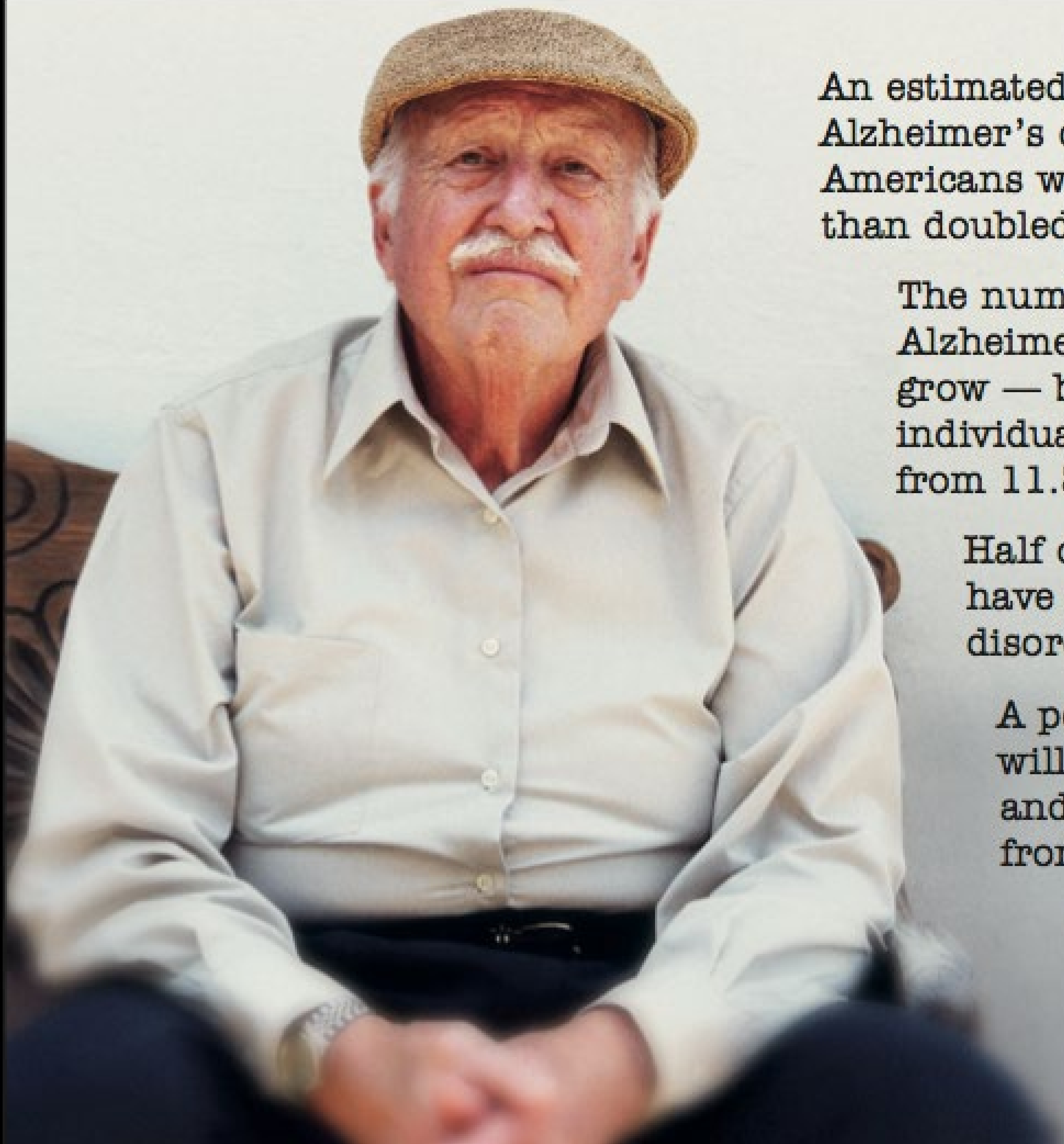
Trusts, estates, wills, probate, estate planning and administration, general and special powers of attorney, health care power of attorney and advance medical directives/living wills, revocable living trusts, And perhaps the finest example of “it’s all about me” lawyer marketing . . .

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

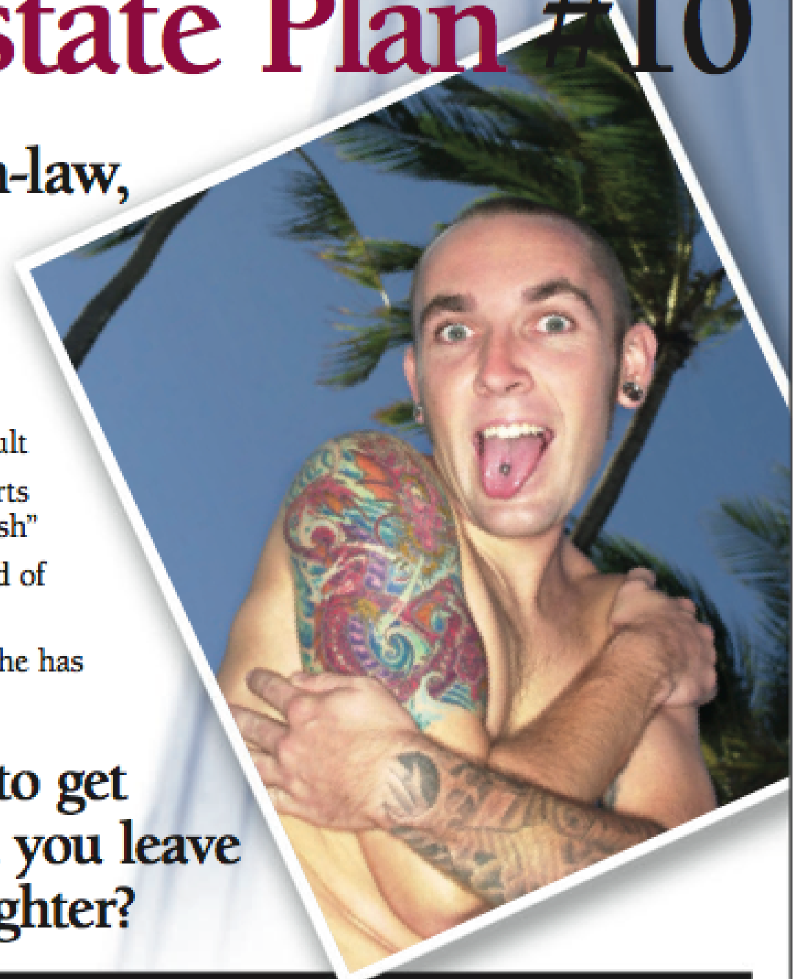
Williamsport Office
49 E. Fourth Street, Suite 200, Williamsport, PA 17701-6355
(570) 321-9008

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

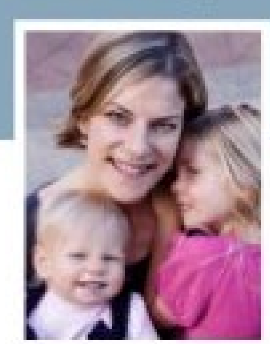
OR

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!**



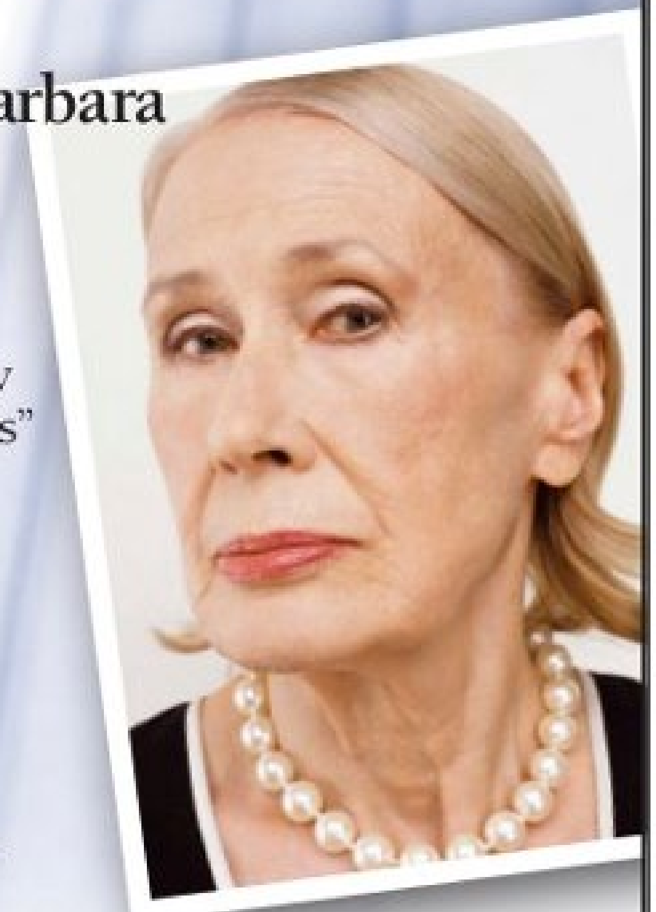
Thea Beatie Eliot
Attorney at Law and
local mom

THEA LAW
a professional corporation
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

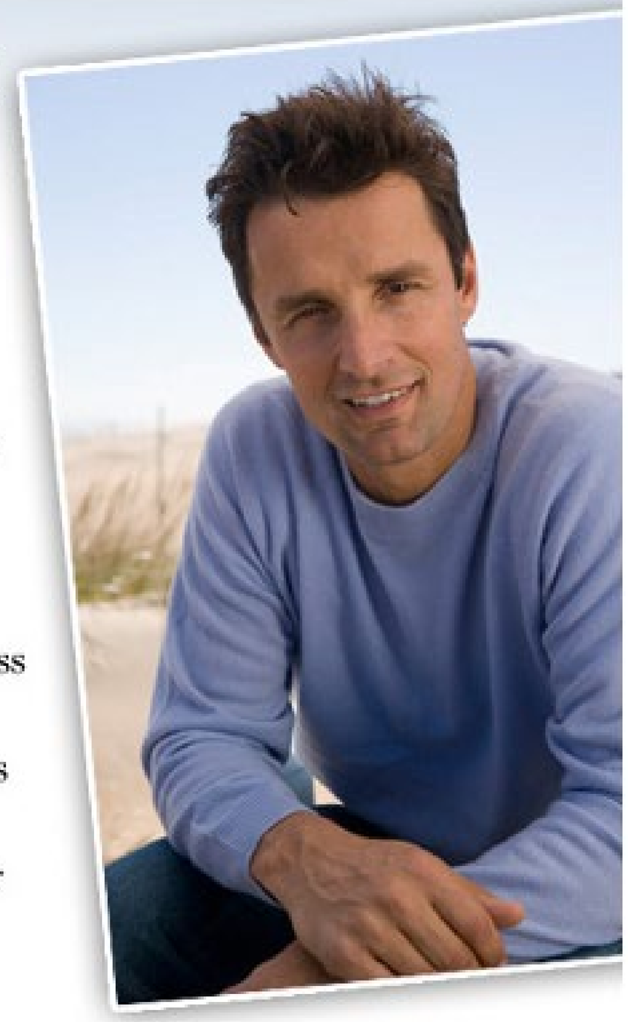
THE LAW OFFICE OF
THEA BEATIE ELIOT

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

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/

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	Unite
2	Contact 2	Contact 2	Title 2	Address 2	New York	New York	12345	[illegible]
3	Contact 3	Contact 3	Title 3	[illegible]	...tle	Washington	12345	[illegible]
4	Contact 3	Contact 4	Title 4	[illegible]	...tle	Washington	12345	[illegible]
5	Contact 4	Contact 5	Title 5	[illegible]	... York	New York	12345	Unite
6	Contact 5	Contact 6	Title 6	[illegible]	... York	New York	12345	Unite
7	Contact 6	Contact 7	Title 7	[illegible]	...tle	Washington	12345	Unite
8	Contact 7	Contact 8	Title 8	Address 8	Seattle	Washington	12345	Unite
9	Contact 8	Contact 9	Title 9	Address 9	New York	New York	12345	Unite
10	Contact 8	Contact 10	Title 10	Address 10	New York	New York	12345	Unite
11	Contact 8	Contact 11	Title 11	Address 11	New York	New York	12345	Unite
12	Contact 9	Contact 12	Title 12	Address 12	Seattle	Washington	12345	Unite
13	Contact 10	Contact 13	Title 13	Address 13	Seattle	Washington	12345	Unite
14	Contact 11	Contact 14	Title 14	Address 14	New York	New York	12345	Unite
15	Contact 12	Contact 15	Title 15	Address 15	London		12345	Unite
16	Contact 13	Contact 16	Title 16	Address 16	London		12345	Unite
17	Contact 14	Contact 17	Title 17	Address 17	London		12345	Unite
18	Contact 14	Contact 18	Title 18	Address 18	London		12345	Unite
19	Contact 14	Contact 19	Title 19	Address 19	London		12345	Unite
20	Contact 15	Contact 20	Title 20	Address 20	London		12345	Unite
21	Contact 16	Contact 21	Title 21	Address 21	Tokyo		12345	Japa
22	Contact 17	Contact 22	Title 22	Address 22	Tokyo		12345	Japa
23	Contact 18	Contact 23	Title 23	Address 23	Tokyo		12345	Japa
24	Contact 18	Contact 24	Title 24	Address 24	Tokyo		12345	Japa
25	Contact 19	Contact 25	Title 25	Address 25	Tokyo		12345	Japa
26	Contact 20	Contact 26	Title 26	Address 26	Tokyo		12345	Japa
27	Contact 21	Contact 27	Title 27	Address 27	Tokyo		12345	Japa
28	Contact 22	Contact 28	Title 28	Address 28	Tokyo		12345	Japa
29	Contact 23	Contact 29	Title 29	Address 29	Paris		12345	Fran
30	Contact 24	Contact 30	Title 30	Address 30	Paris		12345	Fran
31	Contact 24	Contact 31	Title 31	Address 31	Paris		12345	Fran
32	Contact 24	Contact 32	Title 32	Address 32	Paris		12345	Fran
33	Contact 25	Contact 33	Title 33	Address 33	Paris		12345	Fran
34	Contact 26	Contact 34	Title 34	Address 34	Paris		12345	Fran
35	Contact 26	Contact 35	Title 35	Address 35	Paris		12345	Fran
36	Contact 27	Contact 36	Title 36	Address 36	Paris		12345	Fran

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

Click the arrow
heading cell in t
for sort and filt

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

How is your signature block?

Sharon D. Nelson, Esq., President

Sensei Enterprises, Inc.

Digital Forensics|Information Technology|Cybersecurity

3975 University Drive, Suite 225|Fairfax, VA 22030

P: 703.359.0700 | F: 703.359.8434

snelson@senseient.com | https://senseient.com

@sharonnelsonesq (Twitter)

www.linkedin.com/in/sharondnelson

https://amazon.com/author/sharonnelson

https://ridethelightning.senseient.com (security blog)

https://youritconsultant.senseient.com (information technology blog)

https://senseient.com/digital-forensics-dispatch (digital forensics blog)

Virginia Lawyers Weekly Reader Rankings 2020 — Best Data Security Services Provider — Sensei Enterprises — Winner

Virginia Lawyers Weekly Reader Rankings 2020 — Best eDiscovery Provider — Sensei Enterprises — Winner

Virginia Lawyers Weekly Reader Rankings 2020 — Best Data Recovery Service Provider — Sensei Enterprises — Winner

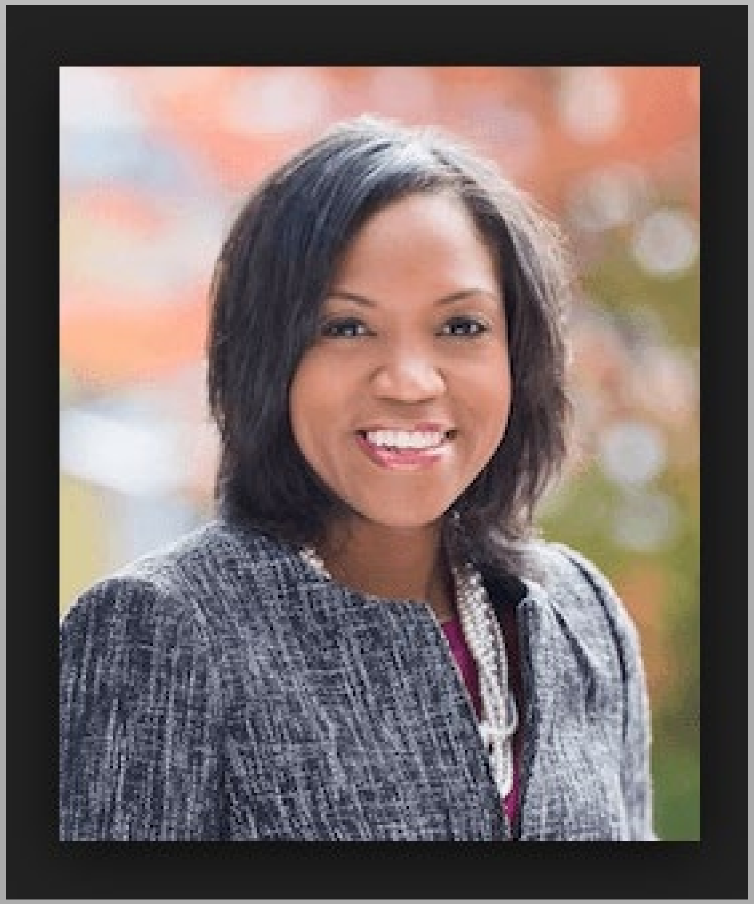
Here is a great program on marketing from Sharon & John

Speaking engagements,

books & free publications

are useful tools

A professional photo is essential



[Michelle C. Thomas & Associates, PC]

[Photo by Eli Turner]

From Michelle’s website today

Michelle C. Thomas

Founder

Download VCard

Tel: 202.536.4841

1250 Connecticut Avenue NW
Suite 700
Washington, D.C. 20036

PRACTICE AREAS

» Divorce & Family Law - 100%

Create a great logo

MEDINA LAW GROUP

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

Sources for unique & traditional cards:

Moo.com

DesignYourOwnCard.com

Crane.com

VistaPrint.com

What Every Virginia Woman Should Know About Divorce

Before You Go - 7 Steps Before Moving Out of the Marital Residence

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 Ris

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

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

New post on **GRAND JURY TARGET**

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

by Kropf Moseley

By: Sara Kropf

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

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

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

GrandJuryTarget.com

Email post links back to blog

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

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.

Basic Training & Beyond

Saturday, March 6, 2021

District of Columbia Bar

Productivity, technology & the essentials

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?

Your competition may be
smarter
richer
and better looking,

but they have the same
amount of time
as you.

Every day

Focus on 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


ScanSnap
Favorites
Show All Applications
ScanSnap Organizer
Scan to CardMinder
Scan to Folder
Scan to E-mail
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

RocketMatter integrations

A DC Bar Member Benefit

[Clio integrations]

[Legal Workspace]

Build a system . . .

Automate Word documents

Free version / Pro version $89.00

The Form Tool

TheFormTool

ABOUT SHOP NOW SUPPORT RESOURCES

Automate YOUR Word Documents in Minutes

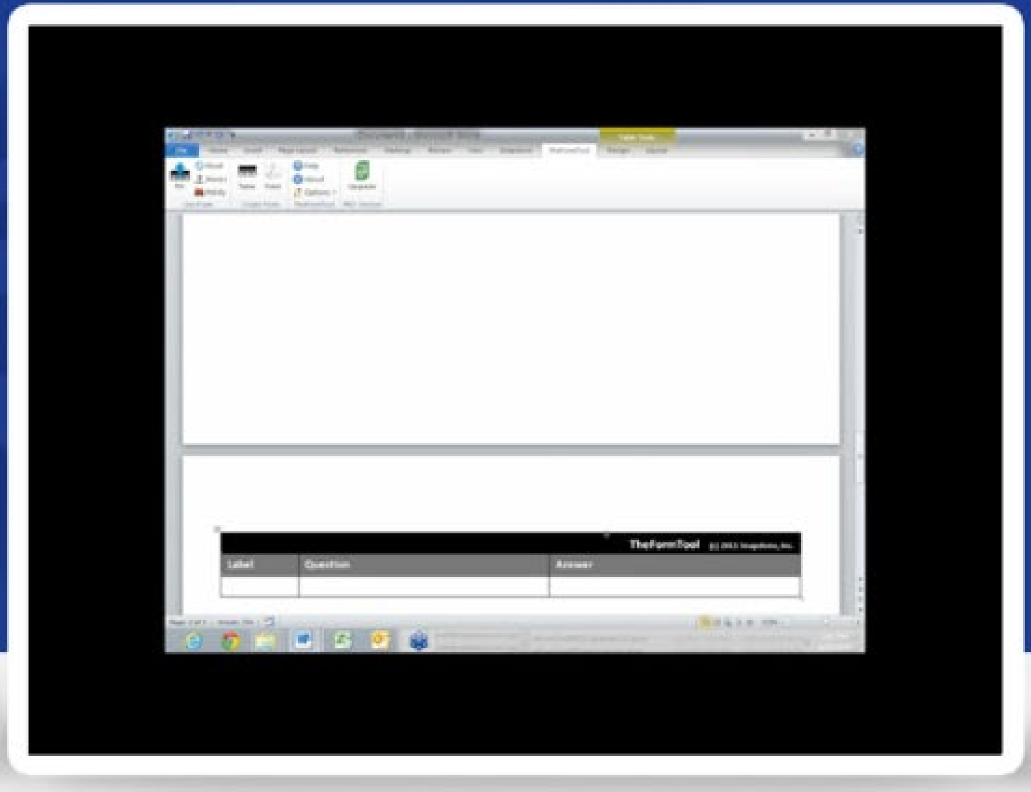
"TheFormTool does in a few seconds what used to take me an hour to do."

100% SATISFACTION GUARANTEED

Download FREE VERSION here

NO RISK! TheFormTool is available at NO COST. We're that confident

Name Surname | Email | Download



Create smart forms and automate documents in MS Word, brilliantly!

TheFormTool is the fastest growing, most user-friendly and powerful software in the world to create forms or automate documents in Microsoft Word.

With a learning curve measured in minutes not months™, it uses your own MS Word documents to create intelligent forms for repetitive use. Many professionals spend as much as 30% of their productive time creating repetitive documents, personalizing them for each client, matter, patient, case or account.

New

You're invited!

Drop in on

"The Learning Curve"

Wednesdays

Free & low cost research . . .

- Fastcase: Nationwide law library for free
- Local research sources: request from PMAS@dcbar.org
- Google Scholar / http://scholar.google.com


TIME59
Web-Based Time & Billing For Lawyers
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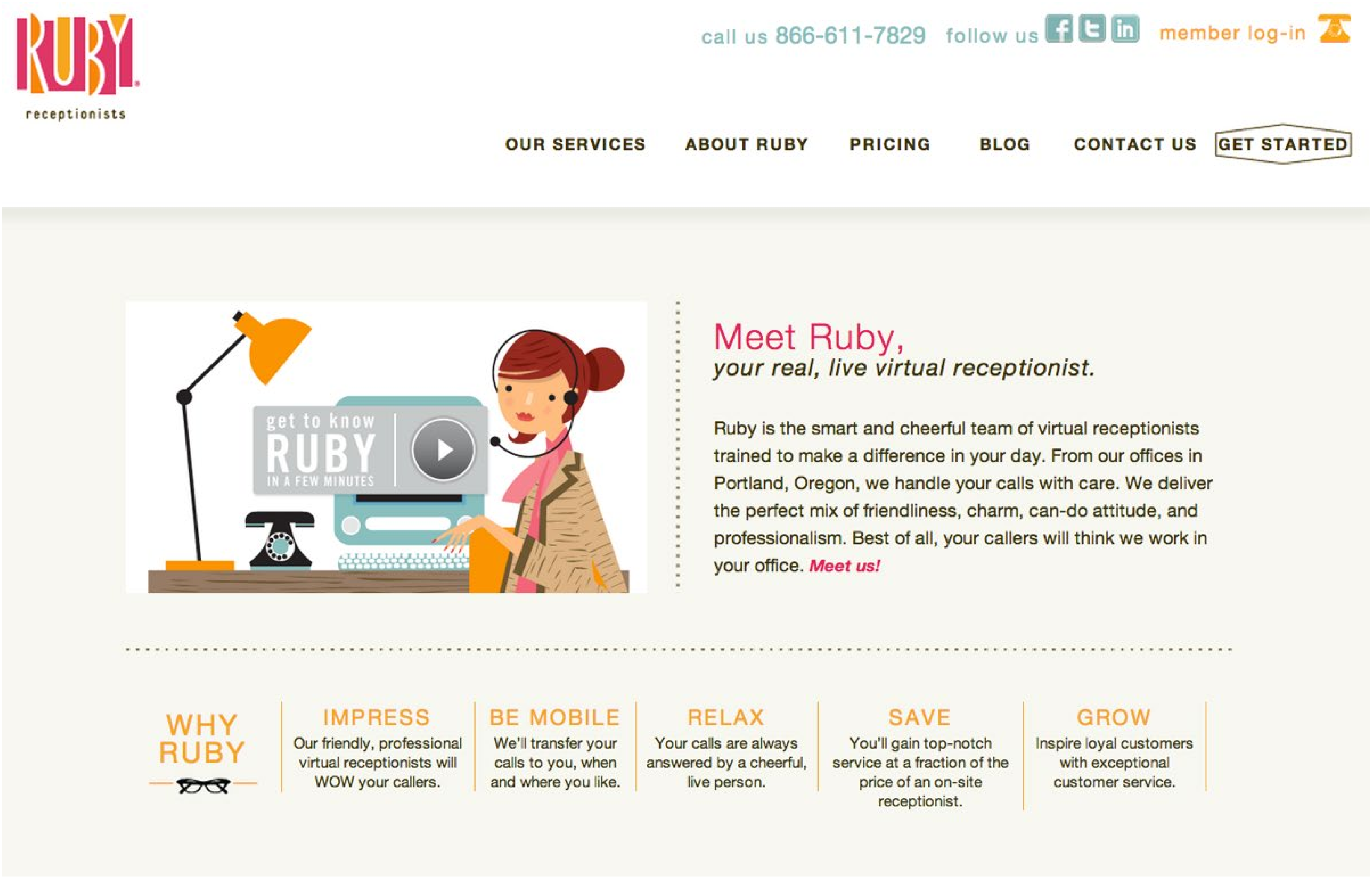
How much does Time59 cost?
Time59 is priced at $99.95 / YEAR for unlimited data. Your first 30 days are FREE. Time59 also has an optional mobile web app called My Time59. Each Time59 subscription includes one FREE My Time59 user. Additional users are priced at $9.95 per user, per month.
How do I get started?
To get started go to the sign up form where you will create your user name and password. When you sign in to your account for the first time you will be instructed on how to proceed. Time59 has plenty of online help to guide you. There's also free, friendly support via phone or e-mail.
Here's what Time59 users are saying...
"I absolutely love Time59! It's the best application (web-based or otherwise) that I've ever used and I really mean that. It has pretty much everything I need and nothing I don't need. I hate overloaded software with a million features I will never use getting in the way."
Reed W. Super, Esq.
"Time59 allows me to easily track time and expenses for all my clients. The system is easy to use and has great features. I highly recommend it for solo lawyers."
Pamela S. Wynn MSW, JD
Boynton Beach, FL
"As a previous user of Timeslips for many years, I can easily toss it out the window for Time59, which is user-friendly, accurate, and easy to access from the internet. I don't have to install software on multiple computers, updates are automatic, and invoices are easy to create and send. I love working with Time59!"
Time59 User From Arizona

[Time59]


RUBY
receptionists
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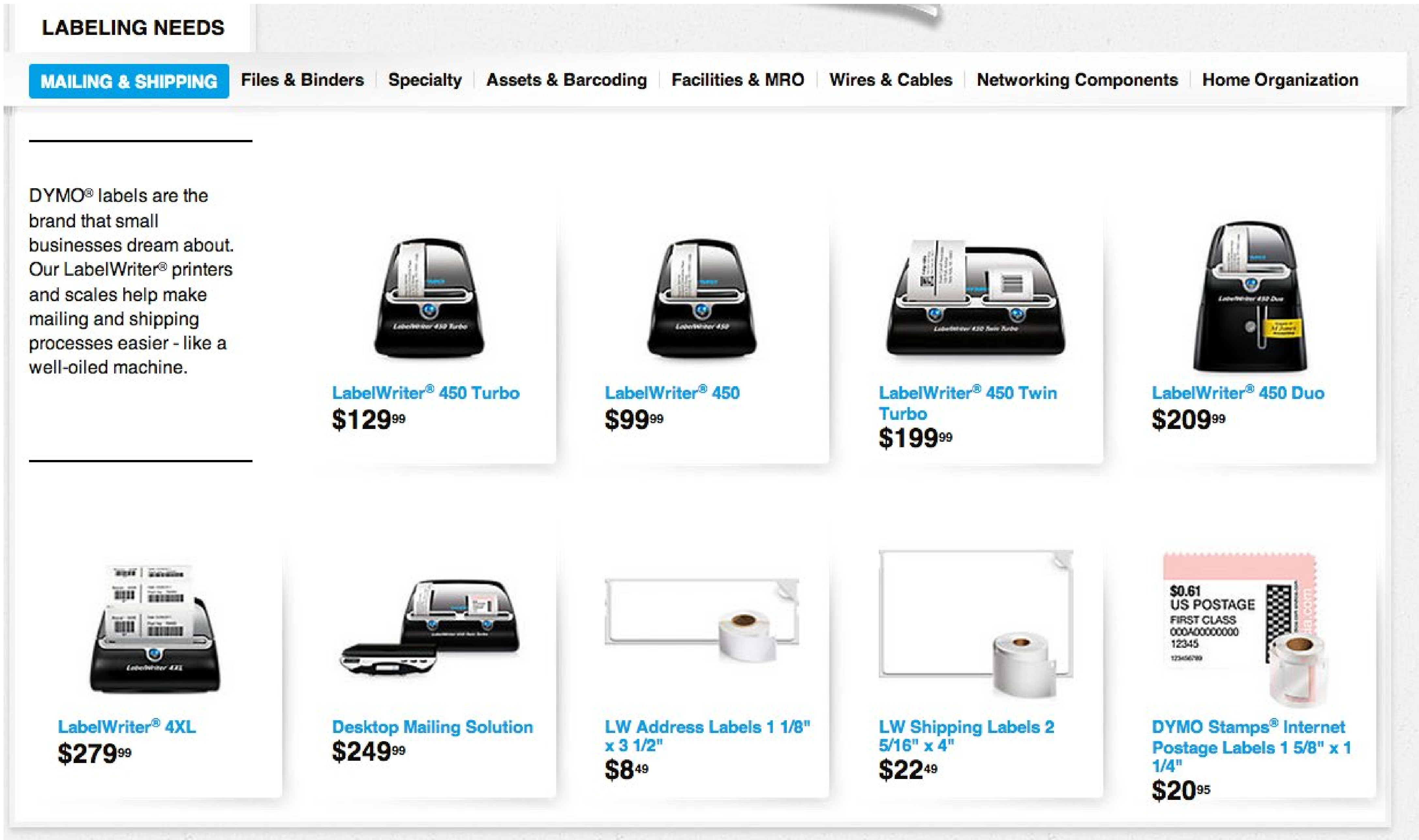
follow us
member log-in
OUR SERVICES
ABOUT RUBY
PRICING
BLOG
CONTACT US
GET STARTED
get to know
RUBY
IN A FEW MINUTES
Meet Ruby,
your real, live virtual receptionist.
Ruby is the smart and cheerful team of virtual receptionists trained to make a difference in your day. From our offices in Portland, Oregon, we handle your calls with care. We deliver the perfect mix of friendliness, charm, can-do attitude, and professionalism. Best of all, your callers will think we work in your office. Meet us!
WHY RUBY
IMPRESS
Our friendly, professional virtual receptionists will WOW your callers.
BE MOBILE
We'll transfer your calls to you, when and where you like.
RELAX
Your calls are always answered by a cheerful, live person.
SAVE
You'll gain top-notch service at a fraction of the price of an on-site receptionist.
GROW
Inspire loyal customers with exceptional customer service.

[Ruby]


LABELING NEEDS
MAILING & SHIPPING
Files & Binders
Specialty
Assets & Barcoding
Facilities & MRO
Wires & Cables
Networking Components
Home Organization
DYMO® labels are the brand that small businesses dream about. Our LabelWriter® printers and scales help make mailing and shipping processes easier - like a well-oiled machine.
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LW Shipping Labels 2 5/16" x 4"
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DYMO Stamps® Internet Postage Labels 1 5/8" x 1 1/4"
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FIRST CLASS

[Dymo]

Video conferencing with Zoom

Office 365 for law firms

Lexicata for client intake & management, has become Clio Grow

Direct Law for virtual lawyering

More tools & support

LawPay

Credit card processing | Getting paid on the go

Bench

Carolyn Warrick

Bookkeeping services

CustomerSure

Reviews on client service

RingCentral

Ooma

Cloud phone system

Emotional intelligence for lawyers

The Power of Emotional Intelligence

Travis Bradberry

ARE YOU **LAWYERING** OR **LABORING**?

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

2.9 hours
The average time spent each day on admin tasks.

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

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

ARE YOU **LAWYERING** OR **LABORING**?

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

2 out of 3 potential clients
Folks who say their "decision to hire" is most influenced by an attorney's responsiveness to their first call or email.

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

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

dMaddy Martin’s full program on May 14, 2020

Recorded Lunch & Learn programs

Maddy is with Smith.ai

Take care of yourself . . .

In a knowledge business, capital is human.

Recommended reading:
[The Practice by Seth Godin]

Client Relations

Basic Training & Beyond

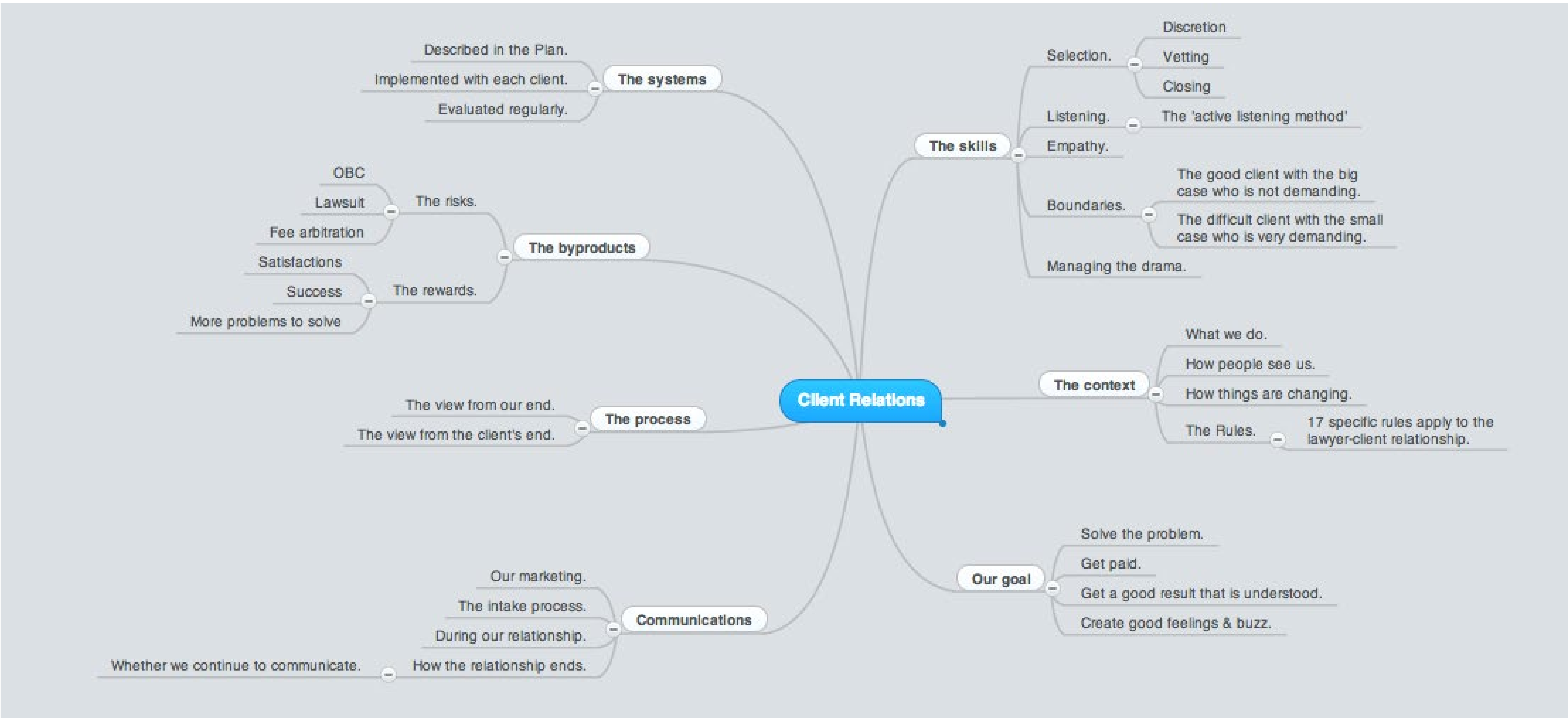
March 6, 2021

Who is your ideal client

Why good client choice is vital

What are the characteristics of your ideal client?

Where are they & how do you talk to them?



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

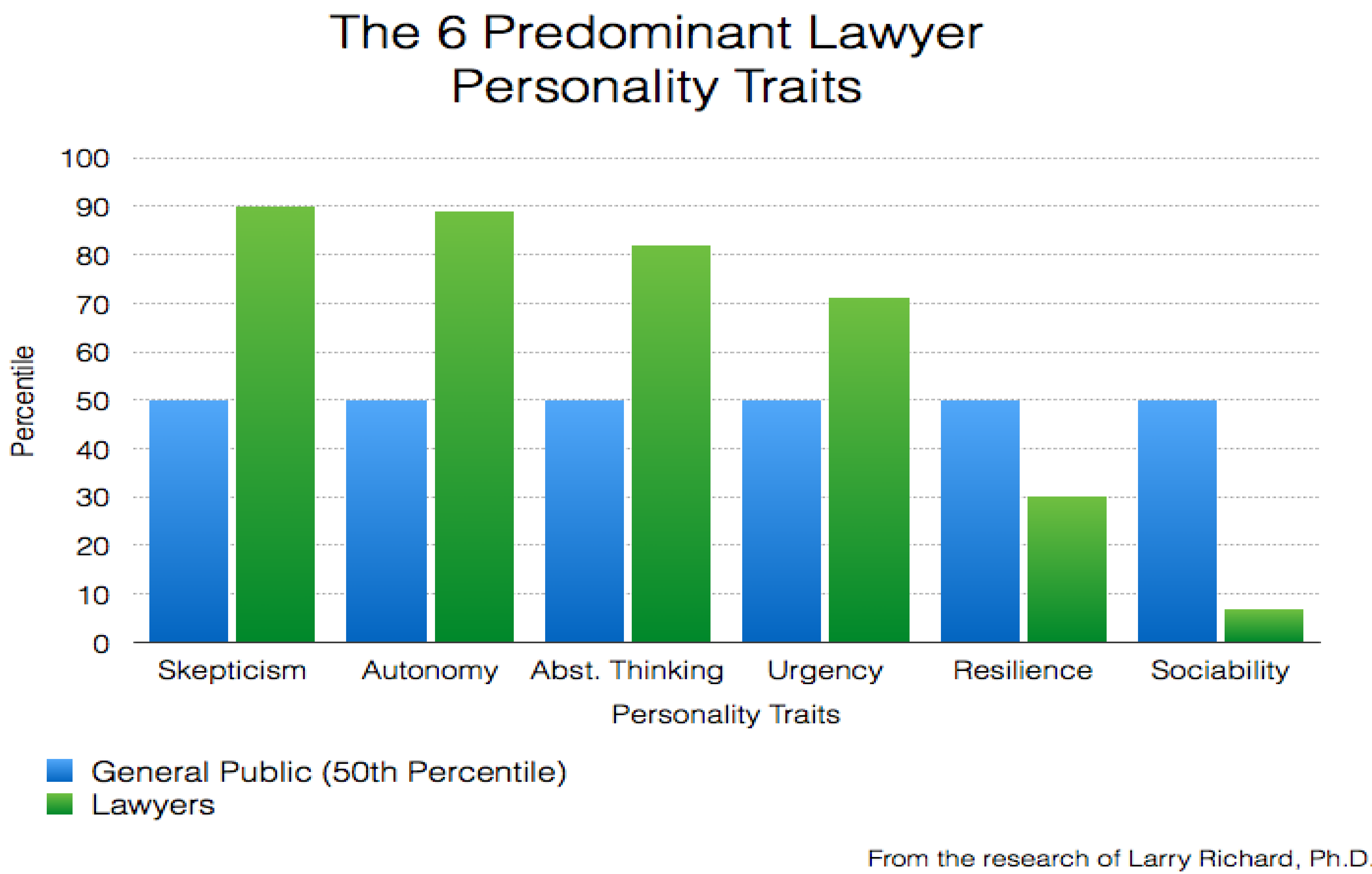
Until we are needed to solve a problem

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 . . . .



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

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

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

Where to find virtual staff?

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

Perfect intake

Create a system

What is your intent?

Focus on prospective client experience

Never leave the prospective client hanging or confused

Time is of the essence

The goal is a vetted client

LEAD CONVERSION FLOW