

Basic Training & Beyond

May 19, 2021

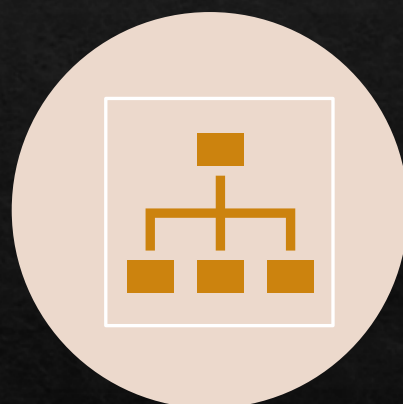
Rochelle D. Washington, Practice Management Advisor



Day 2 Topics



CLIENT RELATIONS



LAW FIRM
MANAGEMENT



MARKETING



**KNOW THE
RULES!**

Regulation

- ◆ Know the Rules
- ◆ Know Where to Get Help
- ◆ Get a Mentor

New PMAS Offerings

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

DCBAR PRACTICE
MANAGEMENT ADVISORY
SERVICE

Practice 360° Newsletter

Calendar

Networking

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

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

Lunch and Learn

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

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

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

Register

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

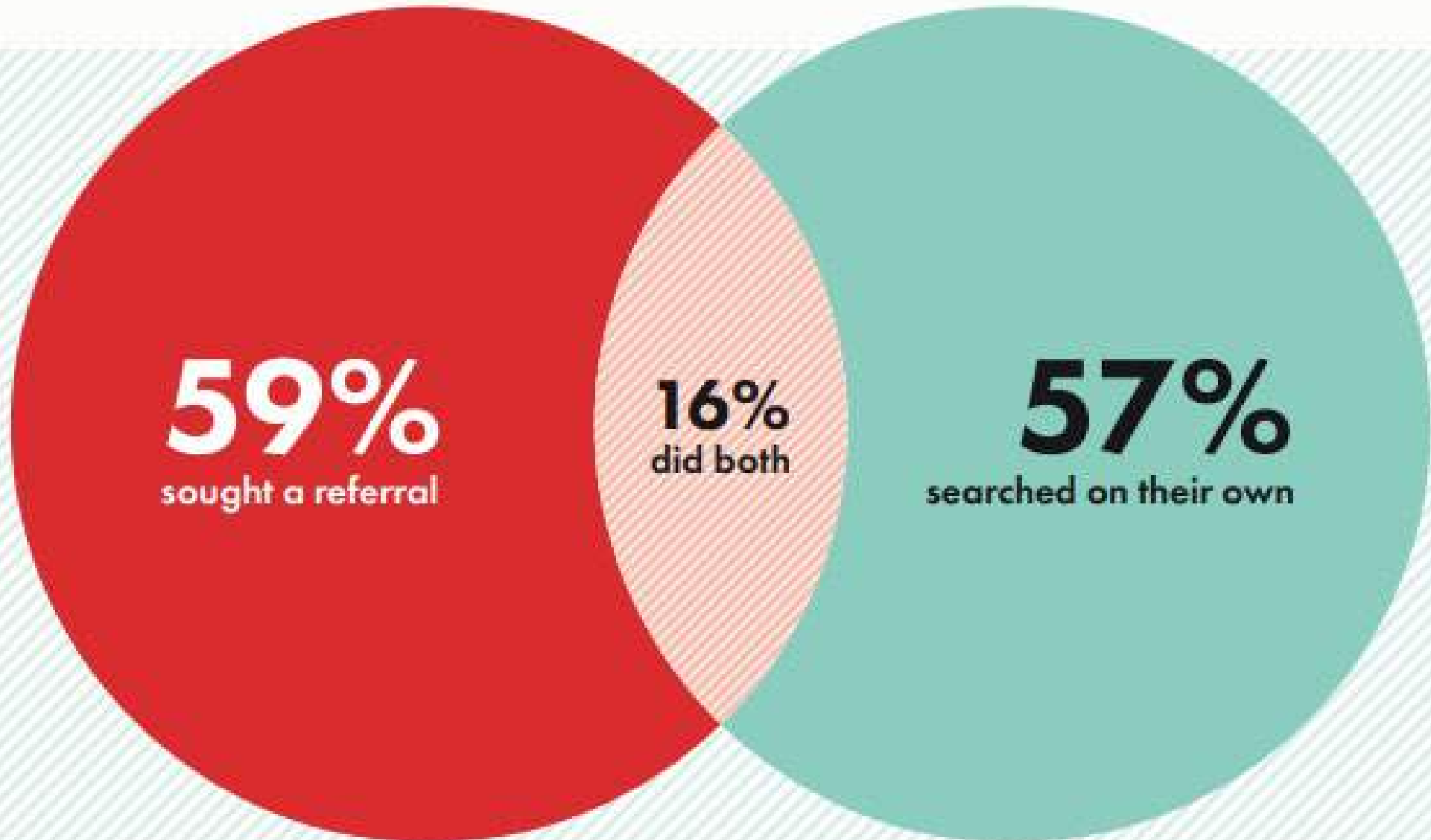
The World Health Organization defines burnout as a syndrome
"resulting from chronic workplace stress that has not been
successfully managed." The primary symptoms include

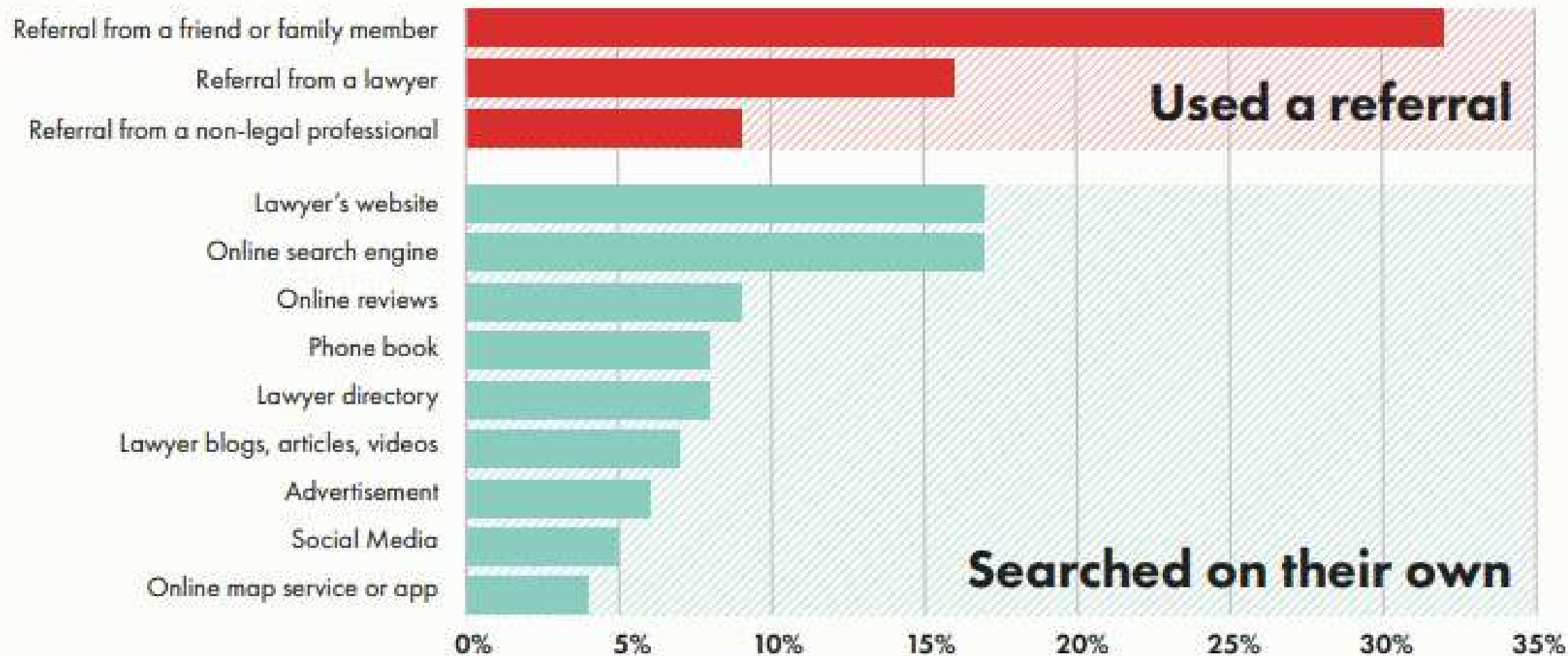
Sign up to
receive our
PMAS Practice
360°
Newsletter

Client Relations



○ Clients seeking a referral versus searching on their own





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

Know What the Client Wants

CUSTOMER RELATIONSHIP
MANAGEMENT

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

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

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

What do clients look for?

Honesty/ Ethics Ratings

Nurses Still Rate Highest for Honesty and Ethics

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. (% Very high/High)

| | 2019 | 2018 | 2017 | 2016 |
|---------------------------|------|------|------|------|
| | % | % | % | % |
| Nurses | 85 | 84 | 82 | 84 |
| Engineers | 66 | -- | -- | 65 |
| Medical doctors | 65 | 67 | 65 | 65 |
| Pharmacists | 64 | 66 | 62 | 67 |
| Dentists | 61 | -- | -- | 69 |
| Police officers | 54 | 54 | 56 | 58 |
| College teachers | 49 | -- | -- | 47 |
| Psychiatrists | 43 | -- | -- | 38 |
| Chiropractors | 41 | -- | -- | 38 |
| Clergy | 40 | 37 | 42 | 44 |
| Journalists | 28 | 33 | -- | 23 |
| Bankers | 28 | 27 | 25 | 24 |
| Labor union leaders | 24 | 21 | -- | -- |
| Lawyers | 22 | 19 | 18 | 18 |
| Business executives | 20 | -- | -- | 18 |
| State governors | 20 | 17 | 16 | 17 |
| Stockbrokers | 14 | 14 | -- | 12 |
| Advertising practitioners | 13 | 13 | 12 | 11 |
| Insurance salespeople | 13 | -- | -- | 12 |
| Senators | 13 | -- | -- | 11 |
| Members of Congress | 12 | 8 | 11 | 8 |
| Car salespeople | 9 | 8 | 10 | 9 |

GALLUP

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

[http://www.abajournal.com/lawscribbler/article/do lawyers really suck no potential clients antipathy can be overcome](http://www.abajournal.com/lawscribbler/article/do_lawyers_really_suck_no_potential_clients_antipathy_can_be_overcome)



Client
Relations
Starts with
Your
Choice

Good Client Selection

Identify:

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





The Goal

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

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



Ask Yourself:

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



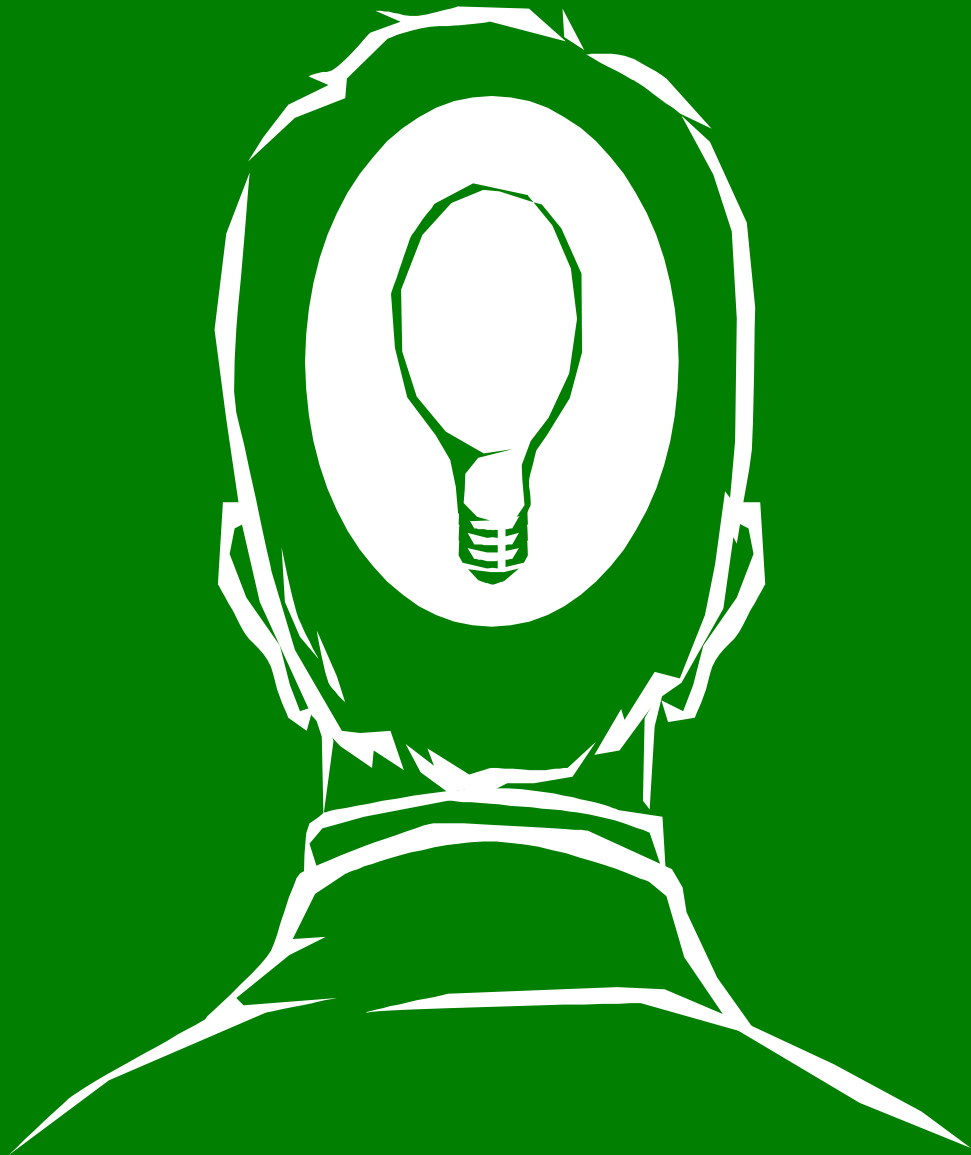
So How ?

1. Questionnaire

- a. Have they had a lawyer before
- b. Check case viability
- c. Can you handle

2. Google

- a. Check public databases, social media, etc.
- b. Take advance fee



How to Close- 10 Steps:

1. Thinking

Conflict Check

Consider a consultation agreement

Consider the fee you will charge



2. Opening the Discussion

◆ -Ask how you can help

◆ -Set an agenda

-LEO 374

◆ Ethical Obligations Regarding Prospective Client Information

3. Needs Assessment

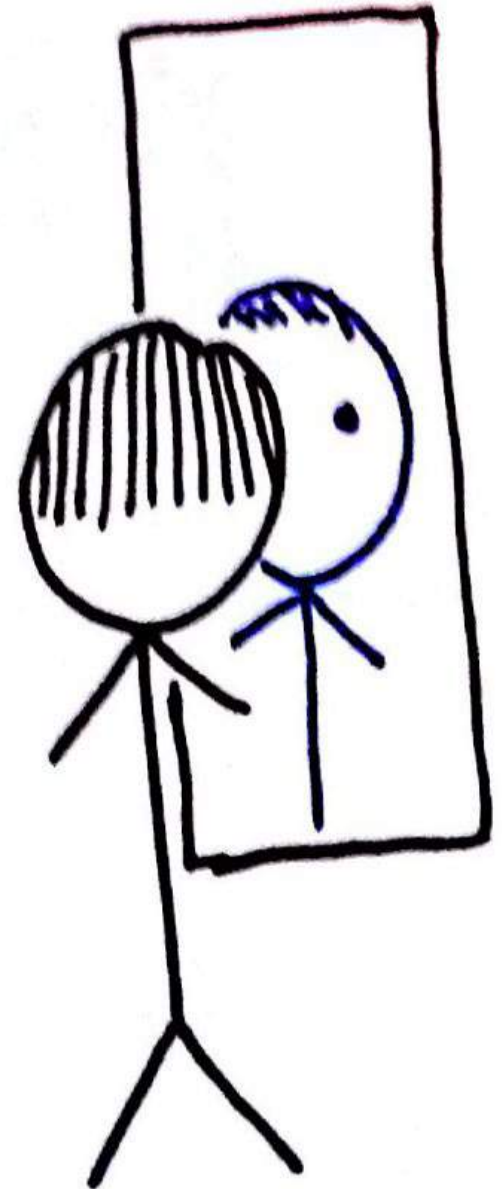
- ◆ Ask questions about the potential client
 - ◆ Who
 - ◆ What
 - ◆ When
 - ◆ Where
 - ◆ Why
 - ◆ How
- ◆ Listen to the answers and follow up as needed



4. Summarize/Restate

Restate your understanding

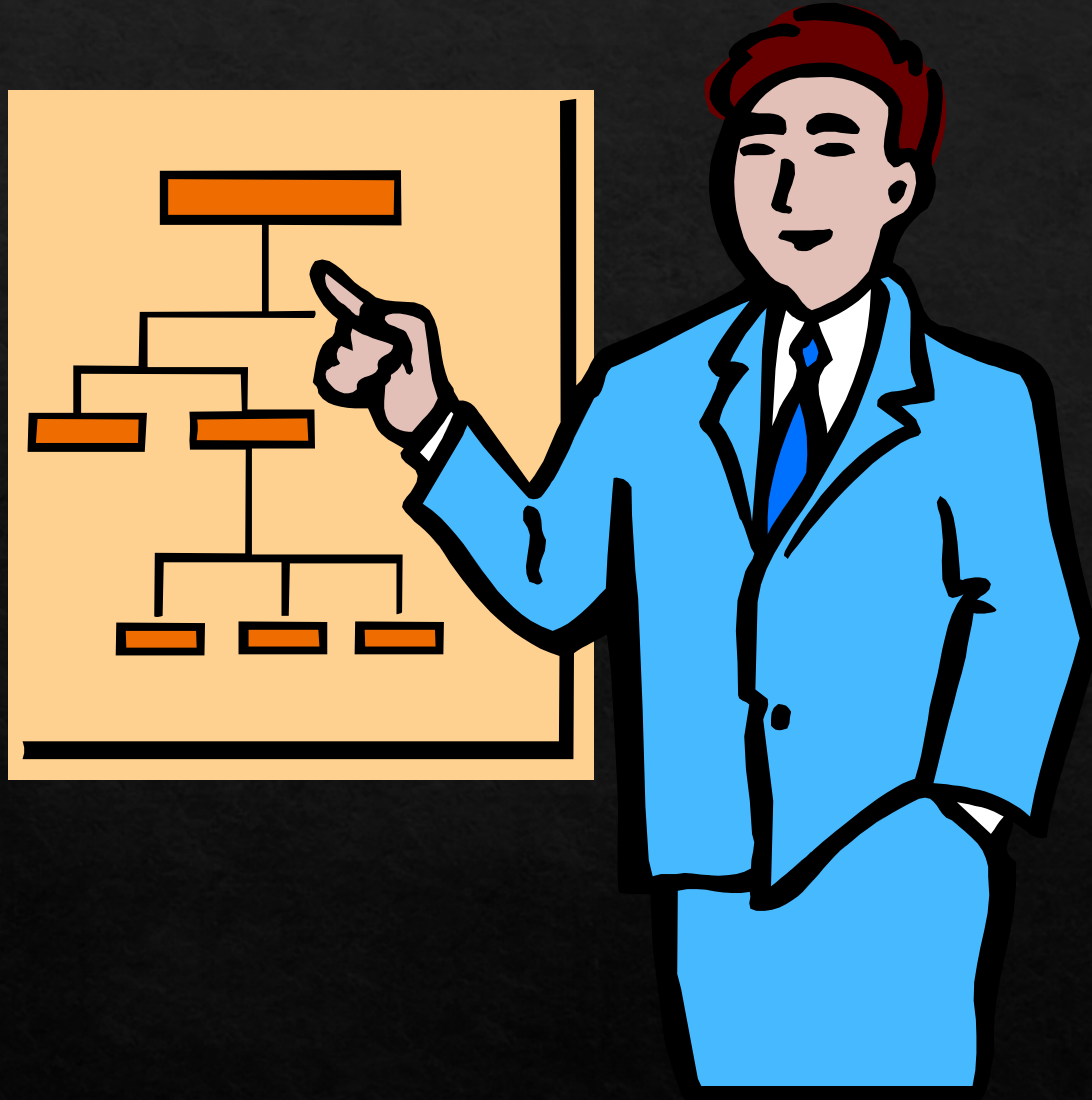
Mirror the PC's concerns



5. State Your Solution



- ◆ Communicate Clearly
- ◆ Give Honest Opinion
- ◆ Appreciate their point of view,
but stick to your own
- ◆ Focus on their agenda



6. Explain the Process

- ◊ What will happen
- ◊ The possibilities
- ◊ The solution
- ◊ Don't oversell

7. Recommendation

◆ You can help

◆ You can't help

◆ Refer it out



8. Justify and Close and...

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

**WHO'S IN
CHARGE?**

Don't let them
beat you up on
price!





9. Follow-up

- ◈ Check in with the PC
- ◈ Agreement must be signed
- ◈ Decline Letter



10. Start
Working Now



Their choice
too!

Contextualized Knowledge

Technologically Competent

Reasonably Accessible

Industry Awareness



Trust is the Key: Listening is the Way

- ◆ Focus
- ◆ Hear words and feelings
- ◆ Restate and validate
- ◆ Clarify
- ◆ Reflect and Summarize
- ◆ Defer Judgment



But They
Said No???

Financial pain points during coronavirus outbreak differ widely by race, ethnicity and income

% saying they have ____ since the coronavirus outbreak started in February

| | Used money from savings/retirement to pay bills | Had trouble paying bills | Gotten food from a food bank/organization | Had problems paying rent/mortgage |
|---------------|---|--------------------------|---|-----------------------------------|
| All adults | 33 | 25 | 17 | 16 |
| White | 29 | 18 | 11 | 11 |
| Black | 40 | 43 | 33 | 28 |
| Hispanic | 43 | 37 | 30 | 26 |
| Asian* | 33 | 23 | 14 | 15 |
| Upper income | 16 | 5 | 1 | 3 |
| Middle income | 33 | 19 | 12 | 11 |
| Lower income | 44 | 46 | 35 | 32 |

*Asian adults were interviewed in English only.

Note: White, Black and Asian adults include those who report being only one race and are not Hispanic. Hispanics are of any race. Family income tiers are based on adjusted 2019 earnings.

Source: Survey of U.S. adults conducted Aug. 3-16, 2020.

"Economic Fallout From COVID-19 Continues To Hit Lower-Income Americans the Hardest"

PEW RESEARCH CENTER

Roughly four-in-ten adults say they or someone in their household lost a job or wages because of COVID-19

% saying each of the following has happened to them or someone in their household because of the coronavirus outbreak

| | Been laid off/lost job | Had to take a cut in pay | Net either/both |
|---------------|------------------------|--------------------------|-----------------|
| All adults | 25 | 32 | 42 |
| White | 23 | 29 | 38 |
| Black | 29 | 32 | 43 |
| Hispanic | 34 | 44 | 53 |
| Asian* | 24 | 41 | 47 |
| Ages 18-29 | 32 | 45 | 54 |
| 30-49 | 28 | 38 | 48 |
| 50-64 | 27 | 30 | 40 |
| 65+ | 14 | 15 | 21 |
| Bachelor's+ | 19 | 32 | 39 |
| Some college | 28 | 34 | 44 |
| HS or less | 29 | 31 | 42 |
| Upper income | 14 | 26 | 32 |
| Middle income | 26 | 33 | 42 |
| Lower income | 33 | 37 | 47 |

*Asian adults were interviewed in English only.

Note: White, Black and Asian adults include those who report being only one race and are not Hispanic. Hispanics are of any race.

"Some college" includes those with an associate degree and those who attended college but did not obtain a degree. Family income tiers are based on adjusted 2019 earnings.

Source: Survey of U.S. adults conducted Aug. 3-16, 2020.

"Economic Fallout From COVID-19 Continues To Hit Lower-Income Americans the Hardest"

About four-in-ten upper-income adults say their family's financial situation has improved in the last year

% saying that, compared with one year ago, their financial situation (and that of their family) is now ...

| | Better | Worse | About the same |
|---------------|--------|-------|----------------|
| All adults | 30 | 21 | 49 |
| Lower income | 22 | 31 | 46 |
| Middle income | 32 | 18 | 49 |
| Upper income | 39 | 11 | 50 |

Among those who are usually able to put money into savings, % saying they have been able to put ____ money into savings than usual since the coronavirus outbreak began in February 2020

| | More | Less | Same amount |
|--------------------------|------|------|-------------|
| All who can usually save | 23 | 31 | 45 |
| Lower income | 16 | 47 | 34 |
| Middle income | 22 | 31 | 46 |
| Upper income | 32 | 17 | 50 |

Note: Share of respondents who didn't offer an answer not shown. Family income tiers are based on adjusted 2019 earnings. Source: Survey of U.S. adults conducted Jan. 19-24, 2021. "A Year Into the Pandemic, Long-Term Financial Impact Weighs Heavily on Many Americans"

PEW RESEARCH CENTER



You may be the problem!

How We Drive Clients Away!

Clio 2019 Legal Trends Report Says:

1. No guidance
2. Unclear pricing
3. No explanation of why
4. Talk like a lawyer
5. Abrupt/Dismissive

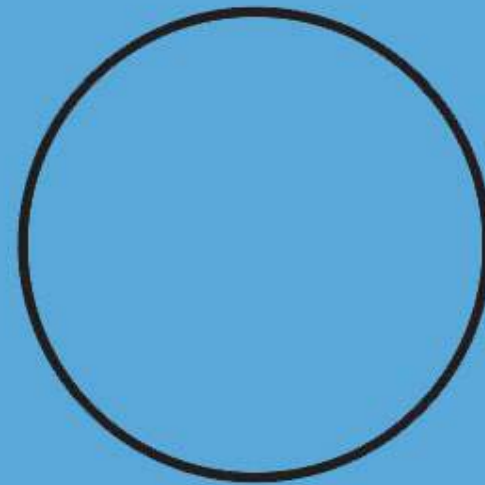
SHAME ON YOU IF YOU DON'T

So, you should....

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

Why No?
Don't End Up
Here!

CIRCLE OF TRUST



YOU → •



If they say
YES...

Get started

Keep

going



Relationship
Management

Listen

Manage Expectations

Initiate Dialog

Initiate Dialogue

1. Interviews

2. Conferences

3. Team interviews

4. Financial planning discussions

5. Ask for Feedback

6. Close Survey

Client Surveys

Request our Consultation Agreement and/ or
Client Satisfaction Survey Form

From PMAS@dcbar.org

Use www.SurveyMonkey.com

More information on Client Relations is at
Page 70, e-Manual





BUT
WAIT!

Who should you avoid?

- ◆ Serial litigant
- ◆ Angry
- ◆ Liar
- ◆ “Let’s Take ‘em Down!”
- ◆ Undercutter





Symptoms of a Problem Client

Managing the Difficult Client

1. Special Time

2. Document, Document, Document LEO
333

3. Set Boundaries- before, during and after

4. Train and Remind



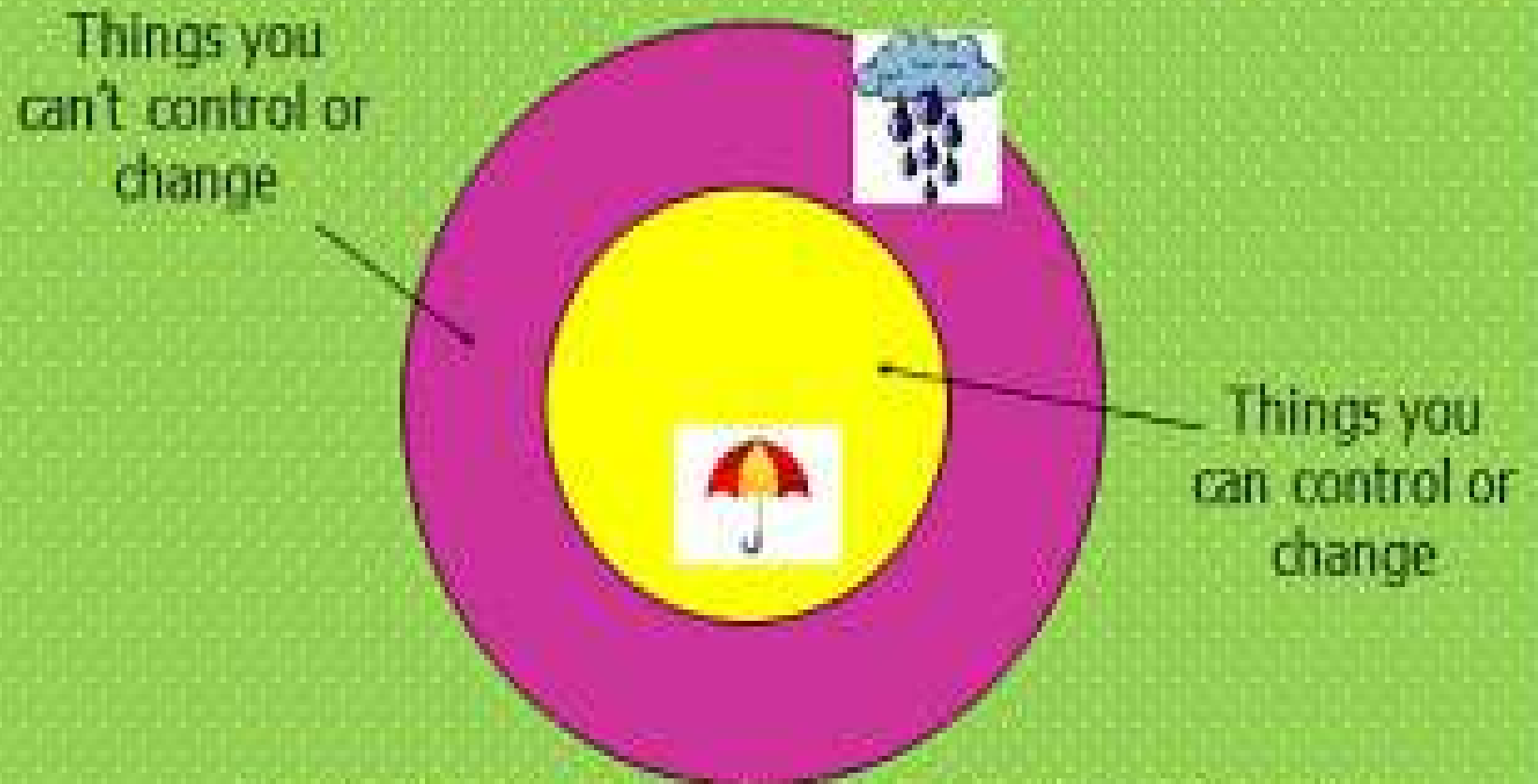
You're Fired!
Rule 1.16(b)

Stop wasting
precious time



We Can't Control Everything!

But you can...



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

Getting Clients to Pay

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



Law Firm Management



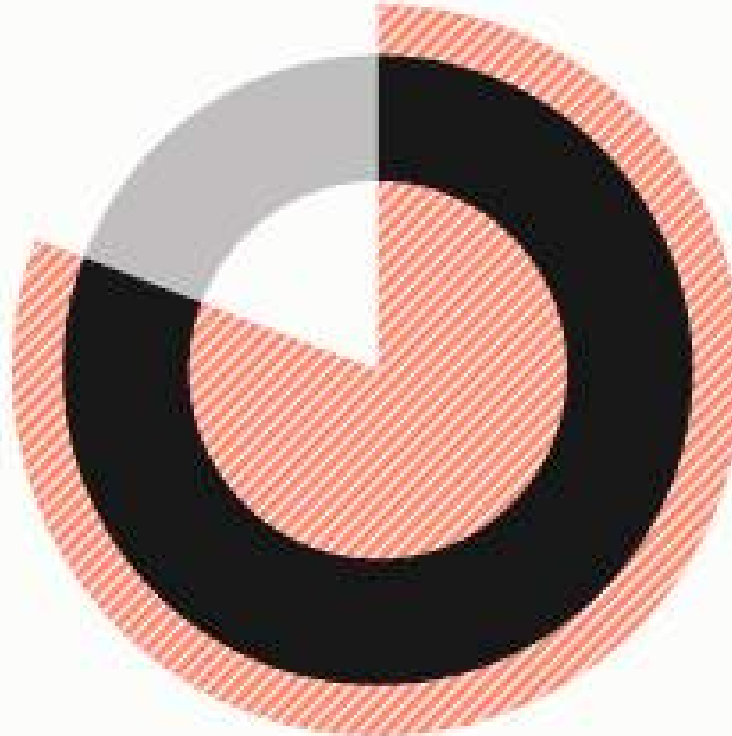
○ Utilization rate



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

31%

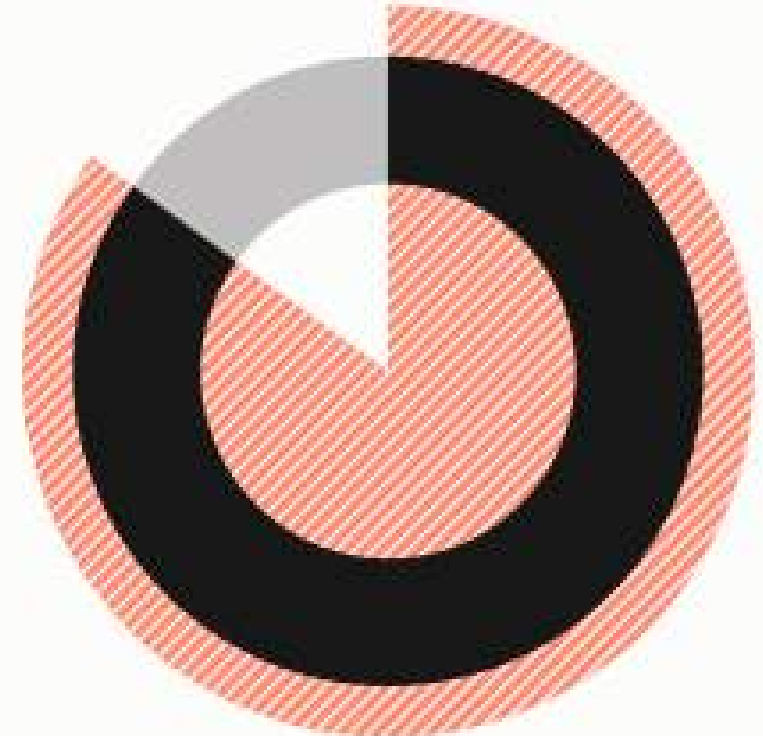
○ Realization rate



Number of billable
hours invoiced ÷ number
of hours worked =

81%

○ Collection rate



Number of hours
collected ÷ number
of hours invoiced =

86%

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

○ Business areas firm managers often engage in



How Lawyers Measure Success





A business
plan in
writing

Law Office Systems

Intake

File Set-Up

File Contents

File Maintenance

Conflict Check

Case Management

Calendar/Docket System

Time and Billing

Office Accounting

Trust Accounting



Client Intake Process

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

Automated Process



◇ <http://garnerlawpllc.com/>

File Set-up

What's in a name?

◇ Example:

◇ 02001JJ= First file opened in 2002, client Jesse James

◇ JJ-W02= A will file opened for Jesse James in 2002

◇ 020001-W= same as above but no client name

◇ 02001-1= Categorize types of file by number. Wills are #1

◇ My system: D-14-101= 1st opened Divorce file of 2014

File Contents

File Set-up

Fee Agreement

New matter info sheet

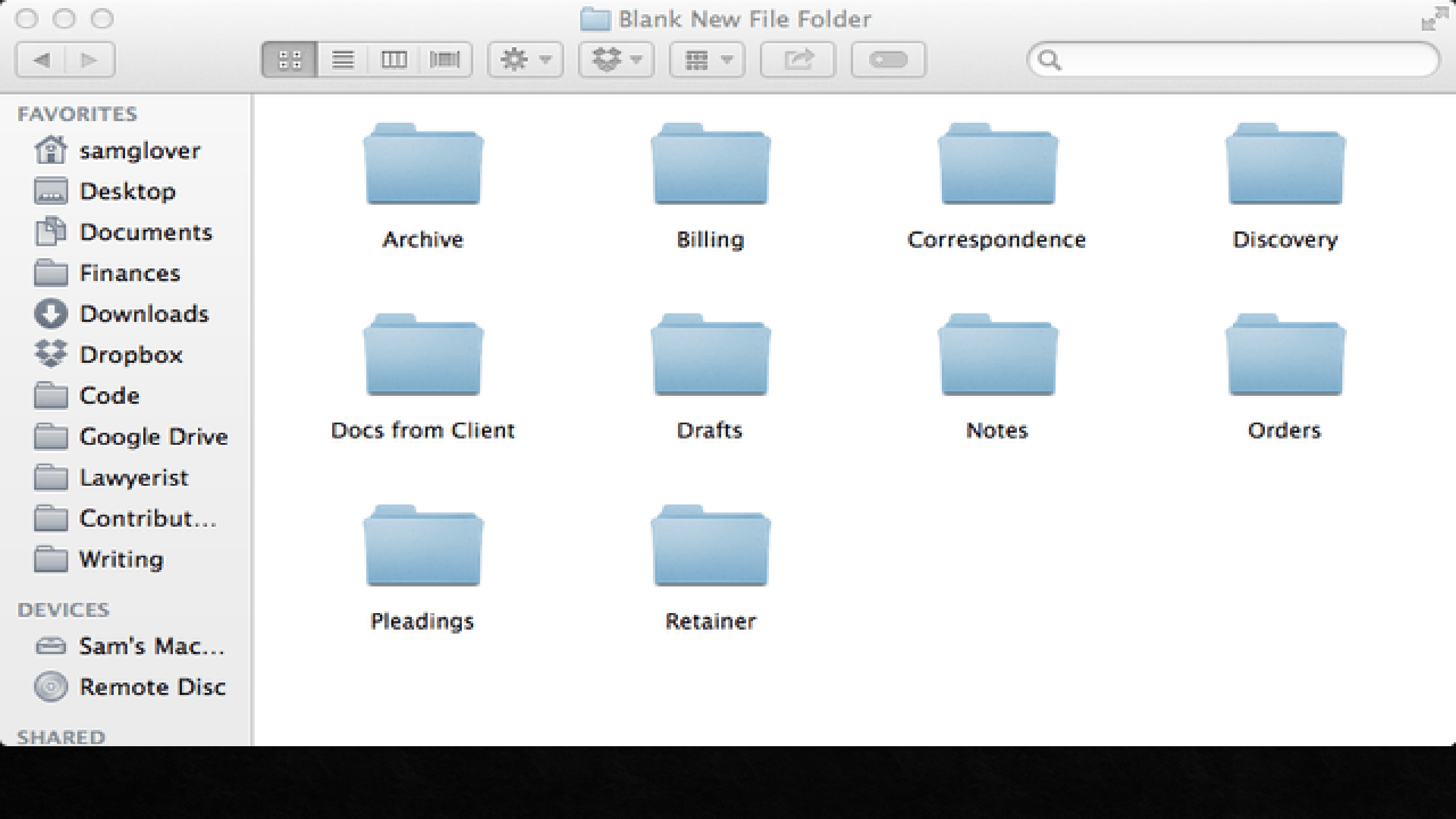
Case notes

Telephone messages

Log












Discovery docs

Expense log





Blank New File Folder

FAVORITES

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

DEVICES

-  Sam's Mac...
-  Remote Disc

SHARED



Archive



Billing



Correspondence



Discovery



Docs from Client



Drafts



Notes



Orders



Pleadings



Retainer

File Maintenance

Conflict Check! D.C. Rule 1.7

Keep a master log of all files

Consistent naming conventions

File location management system

Consider storage

Case Management Case & Action Manager- Manual

[illegible]

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

Use one uniform system that includes all important dates

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

Office procedure for deadlines

Calendar/Docket

Billing System: Track Your Time Now!

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



Content of your invoices will improve

Better explanation of the work

More likely to be fair and accurate

Review before they are sent to client

Block out time to do this!

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

Tracking time now means...

Make Invoices Look Good





Include:

- ◆ Date
- ◆ Time worked
- ◆ Expenses incurred
- ◆ Prominently display the amount owed
- ◆ Timeframe for client to dispute
- ◆ How you take payments
- ◆ Email or Snail mail, know your clients expectations

01

Follow the
terms in your
fee agreement

02

Bill when you
say you will

03

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

04

Don't include
invoice with
work product-
keep separate

Invoice Timing



A Few Suggestions:

- ◆ Resist billing for more than two hour blocks for work. (break up the entries)
- ◆ Total up smaller entries (avoid appearance of nickel and diming)
- ◆ When invoice is larger than normal send before normal cycle to give client a heads up

A Few Suggestions:

- Avoid Duplicate entries
- Provide Dispute Options
- Automate!

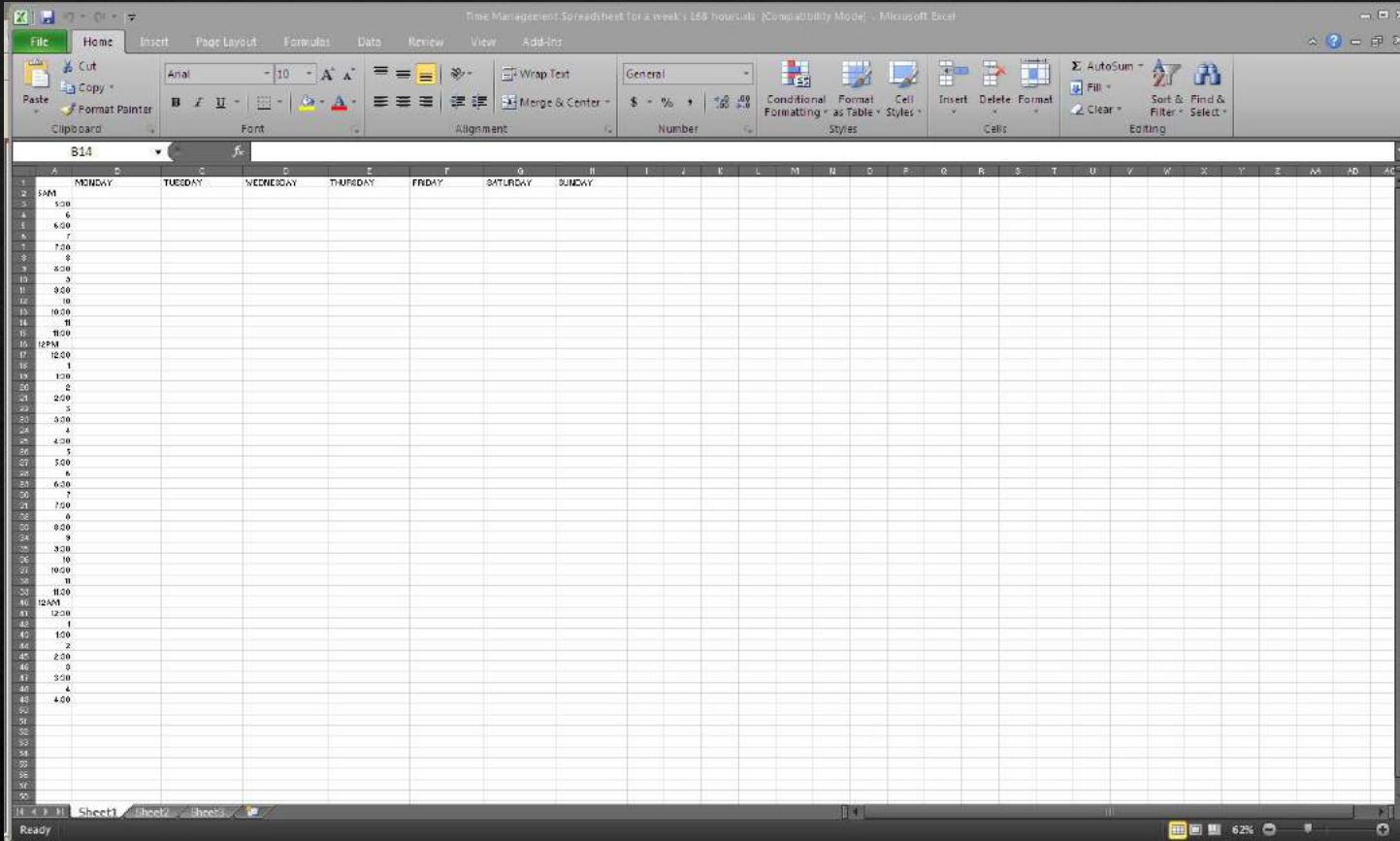




If they do not pay:

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

Time Management Sheet



Office Accounting Procedures

- Basic Book-keeping
 - ◊ Tracking your business expenses
 - ◊ Effective debiting and crediting procedures
- Balance Sheet
- $\text{Assets} = \text{Equity} - \text{Liabilities}$
 - How much you owe and what you own

Accounting Tips



IOLTA Accounting

3-Way reconciliation of client funds

Productivity

1

The simple secret to
productivity

2


Block out Time -
important times for
all ongoing task

3

Being disciplined

Managing time . . .

Working smarter . . .



How do you
work the most
efficiently and
effectively

What are the
tools you need

1. Name your workflow

2. Identify Start and End Points

3. Identify what is need to perform the process

4. List any task and activities

5. Identify the order task should be accomplished

6. Identify roles

7. Identify your flowchart type and draw it out

8. Review and finalize

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

Create Workflows



TECHNOLOGY
IS
Key

Introducing A New Name: Business & Tech.

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

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

C

Envi
mon
data
new
a fas

By DA

Wh
velop

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

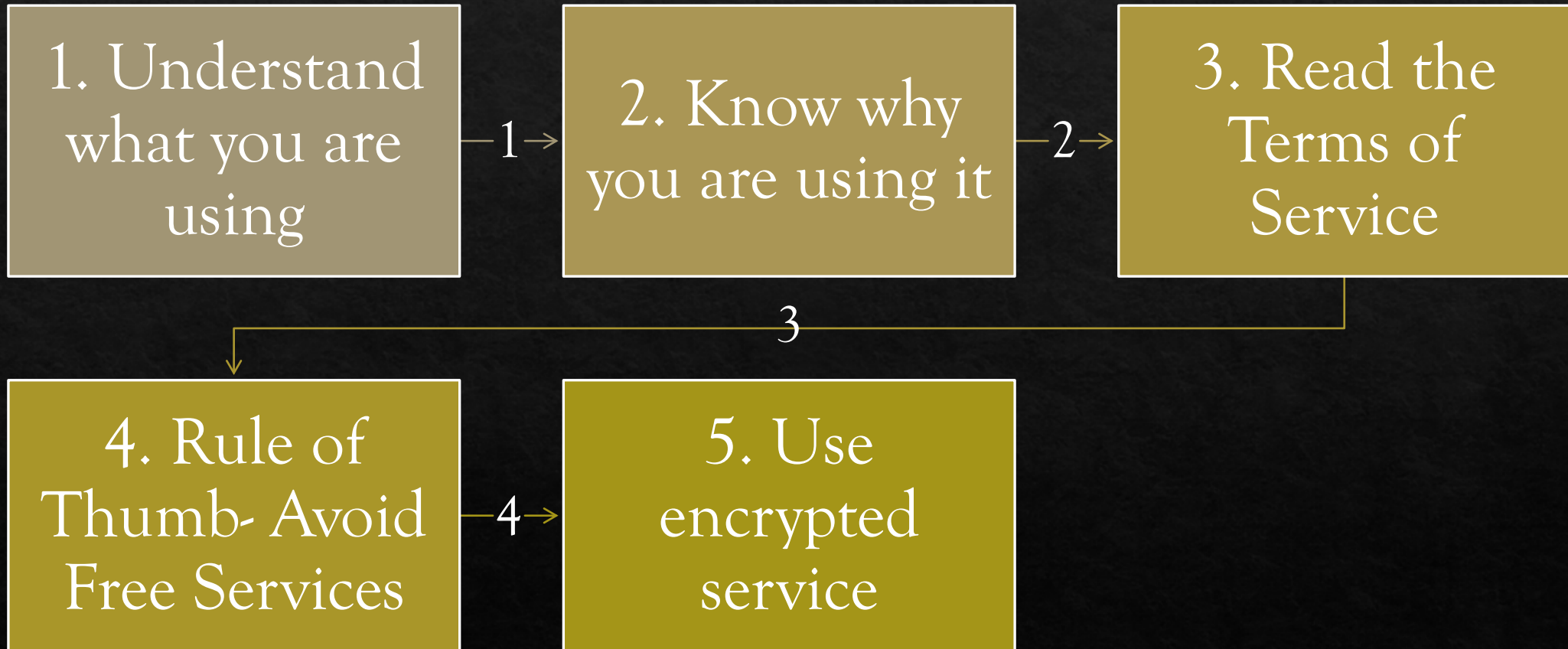
How Technology Helps You



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



Tech Implementation – Best Practices



Do you really need an office?



Virtual Office

Brick and Mortar

The Virtual Office



Laptop



Printer/Scanner/Copier



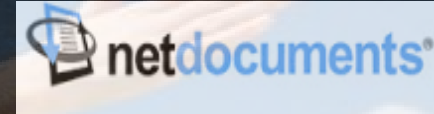
Website



Email/web hosting



Case Management



Document Management



Phone



Conference/meeting room



Answering Service





Virtual Law Firm

- ◇ www.garnerlawpllc.com
- ◇ www.mdfamilylawyer.com



Monitors – the More the Merrier!



Printer and
Scanner

And if you REALLY want to go Virtual...



Client Portal

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

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

Free 30 Day Trial

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[Key Features of the DirectLaw Virtual Law Firm Platform](#)



[See How Our Document Automation Solution Works Inside the DirectLaw Platform](#)

Read the Whitepaper:



HOME

LEGAL SERVICES

LEGAL ADVICE

DIVORCE GUIDE

ABOUT US

FAQ

SUPPORT

SEARCH

LOG IN



DIVORCE YOU CAN AFFORD

Consider Divorce Mediation If You Have A Conflict

[Read More](#)



When do you need tech?

◆ Automate

◆ Delegate

◆ Eliminate

How to Choose Technology for your Law Office

- ◆ 1. Attractive/Appealing
- ◆ 2. Intuitive
- ◆ 3. Utility
- ◆ 4. Price Point
- ◆ 5. Secure

- ◆ 1. Steve Jobs
- ◆ 2. Word vs. Word Perfect
- ◆ 3. Functionality for your firm
- ◆ 4. Bottom Line
- ◆ 5. Safe for client data?

Block out Time

Try at least 3

Confirm capabilities and Intuitiveness

Like the look and feel

Allows for your billing methods

Integration with other products (accounting)

Electronic/ Batch Invoicing option

Accounts Receivables

WIP view

Selecting
Your Product



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

 Larry Port  January 25, 2019  Quick Tips  0 Comments

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



BENEFITS AND SAVINGS

REASONS TO GO PAPERLESS

ONE



SAVES TIME

TWO



USE LESS SPACE

THREE



BETTER SECURITY



\$10,000

\$10,000

estimated savings per year at an
EIGHT-EMPLOYEE company



\$1,000,000

\$1,000,000

estimated savings per year at a
370-EMPLOYEE company

A FEW GREAT TECH TOOLS



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iOS 13



Press about
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SAAS vs. Software on PC



TIME TO UPDATE



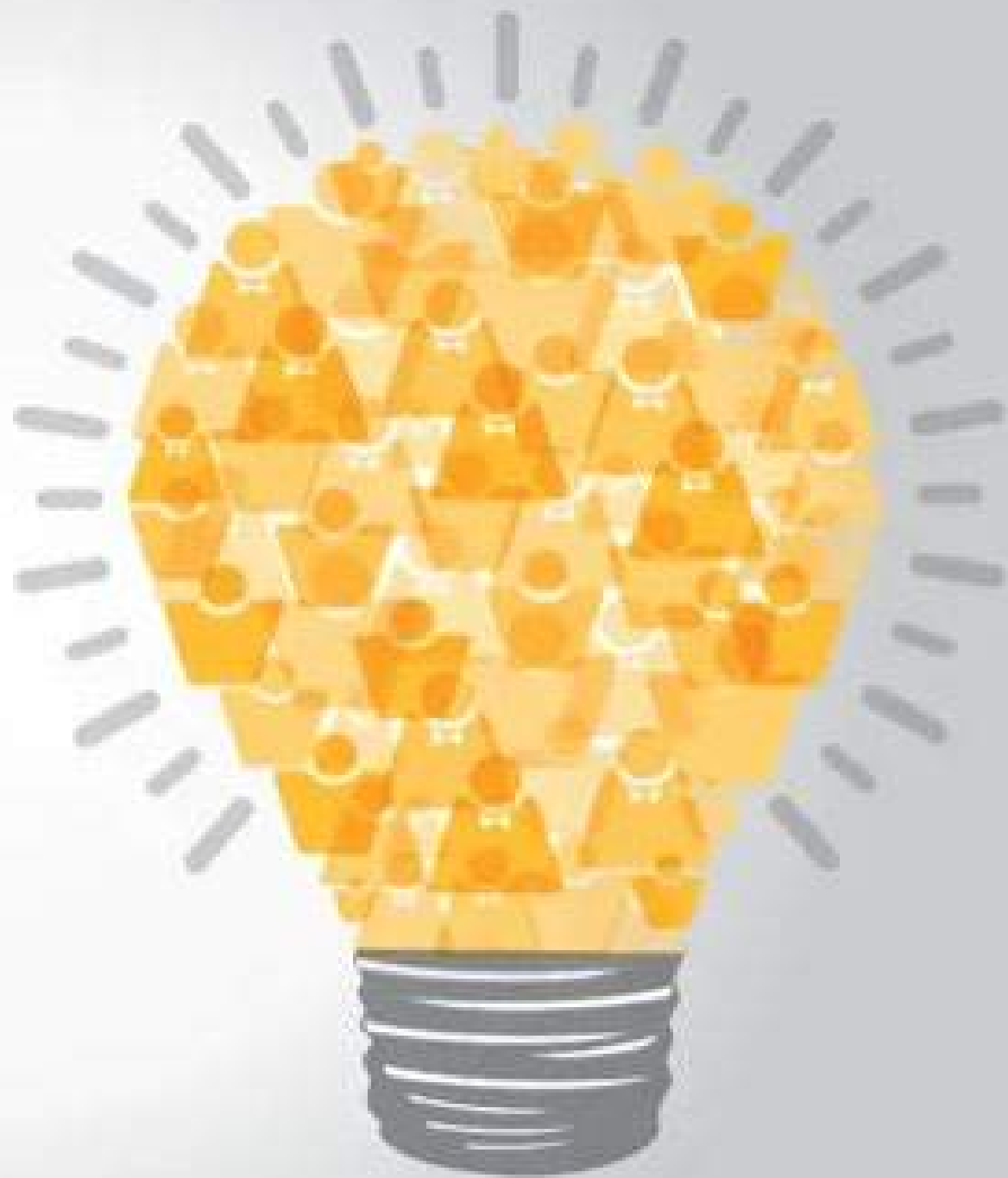
Basic Technology for Lawyers

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

CASE

MANAGEMENT

GET SMART





Clio

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



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

[VISIT WEBSITE](#)

[LEARN MORE](#)



MyCase

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



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

[VISIT WEBSITE](#)

[LEARN MORE](#)



PracticePanther

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



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

[VISIT WEBSITE](#)

[LEARN MORE](#)



Aderant Expert ...

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



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

[VISIT WEBSITE](#)

[LEARN MORE](#)



LegalEdge

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



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

[VISIT WEBSITE](#)

[LEARN MORE](#)



Actionstep

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



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

[VISIT WEBSITE](#)

[LEARN MORE](#)



Zola Suite

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



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

[VISIT WEBSITE](#)

[LEARN MORE](#)



CosmoLex

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



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

[VISIT WEBSITE](#)

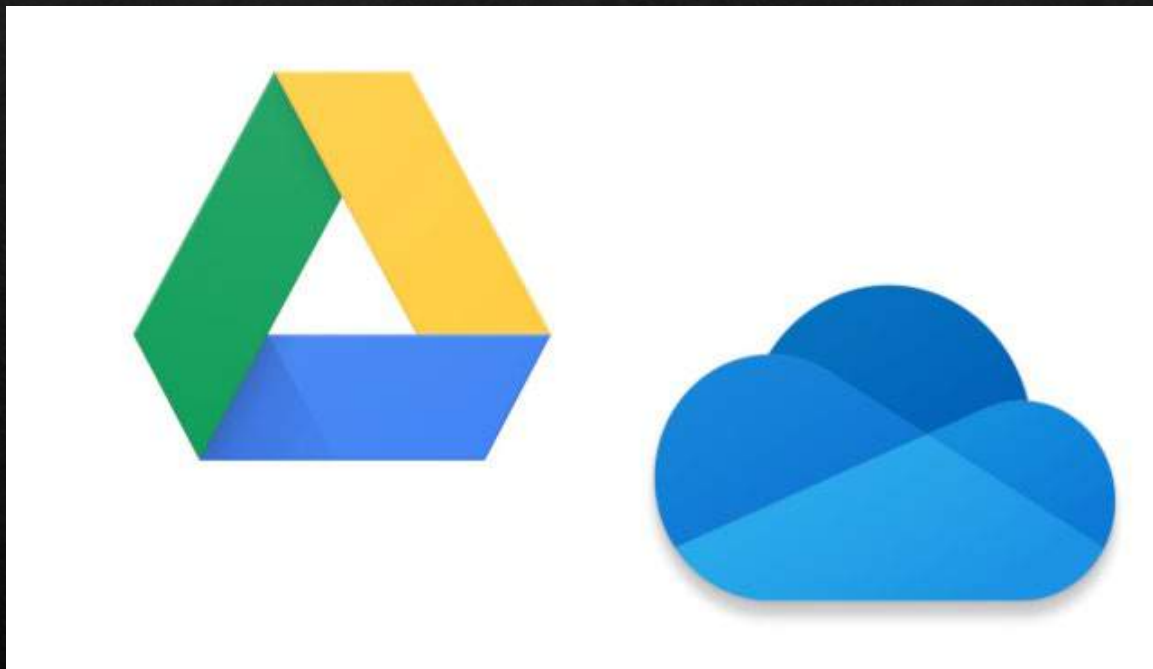
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[Click here](#)

G Suite



Office 365



Simple Document Management

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

PC World 12/2019

Document Automation



Calendar System



Time and Billing



BillQuick

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

CLOUD FILE MANAGEMENT



www.citrix.com

www.onedrive.com

www.box.com

www.dropbox.com

[Click here to see comparison](#)

The Lawyer's Options



~~\$199.99~~
\$174.99

Dragon Premium Version 13

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



Now
\$299.99

Dragon Premium Wireless

Dictate to your computer with a Dragon wireless Bluetooth headset.



Now
\$299.99

Dragon Premium Mobile

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

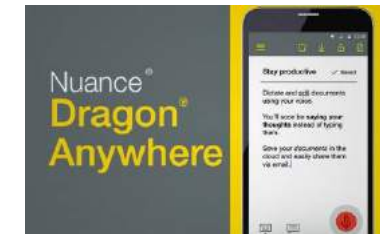


Dragon Professional Individual

New in 2015 **\$300**



Dragon Legal Individual
New in 2016
Starting at \$500



Dragon Anywhere for Android and iOS

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

Office Accounting



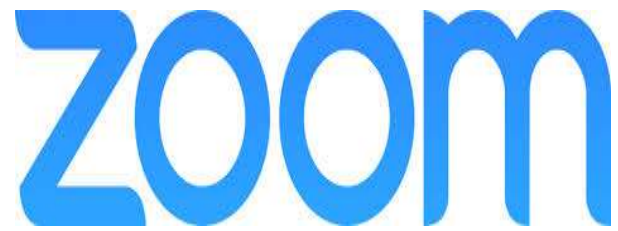
www.quickbooks.com

www.xero.com

www.wave.com

www.freshbooks.com

Video is the Way to Go!

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

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

Electronic Signatures



◇ www.echosign.adobe.com

◇ www.docuSign.com

◇ www.rightsignature.com

◇ www.hellosign.com



How E-Signatures Work



Electronic Fax



◇ <http://Faxzero.com>

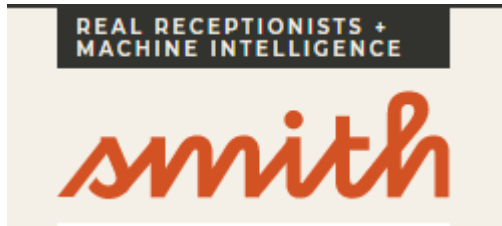
◇ www.efax.com

Legal Research

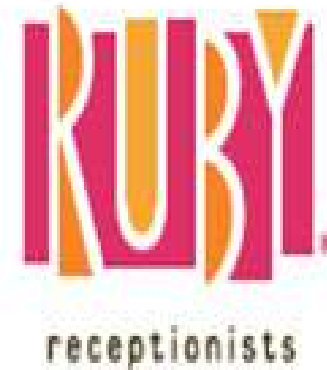
Fastcase is a Member Benefit at many bar associations



Outsource It!



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



Data Back-up



CARBONITE ™

◇ www.mozy.com *

◇ www.carbonite.com

◇ www.ironmountain.com





Good afternoon

[↓ Install Office 2016](#)

[Other installs](#)

Search online documents

| | | | | | | | | | |
|-----------|--------------|------------|--------------|----------------|-------------|----------------|-----------|------------|------------------|
| Mail | OneDrive | Word | Excel | PowerPoint | OneNote | SharePoint | Teams | Yammer | Dynamics 365 |
| Flow | Calendar | People | Newsfeed | Planner | Tasks | Delve | Video | Sway | PowerApps |
| Forms | Stream | Store | | | | | | | |

Office 365

Office 365 Business

\$8.25 user/month
(annual commitment)

[Buy now](#)

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

Office apps included



Outlook



Word



Excel



PowerPoint



Access
(PC only)

Services included



OneDrive

Office 365 Business Premium

\$12.50 user/month
(annual commitment)

[Buy now](#)

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

Office apps included



Outlook



Word



Excel



PowerPoint



Access
(PC only)

Services included



Exchange



OneDrive



SharePoint



Teams

Office 365 Business Essentials

\$5.00 user/month
(annual commitment)

[Buy now](#)

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

Office apps included

(Web and mobile versions only) ¹

Services included



Exchange



OneDrive



SharePoint



Teams

Not just Microsoft



Doodle®

17hats

zoom



zapier





Appointment Scheduling



calendly



Find Time*

(this will be rereleased and renamed October 2017)

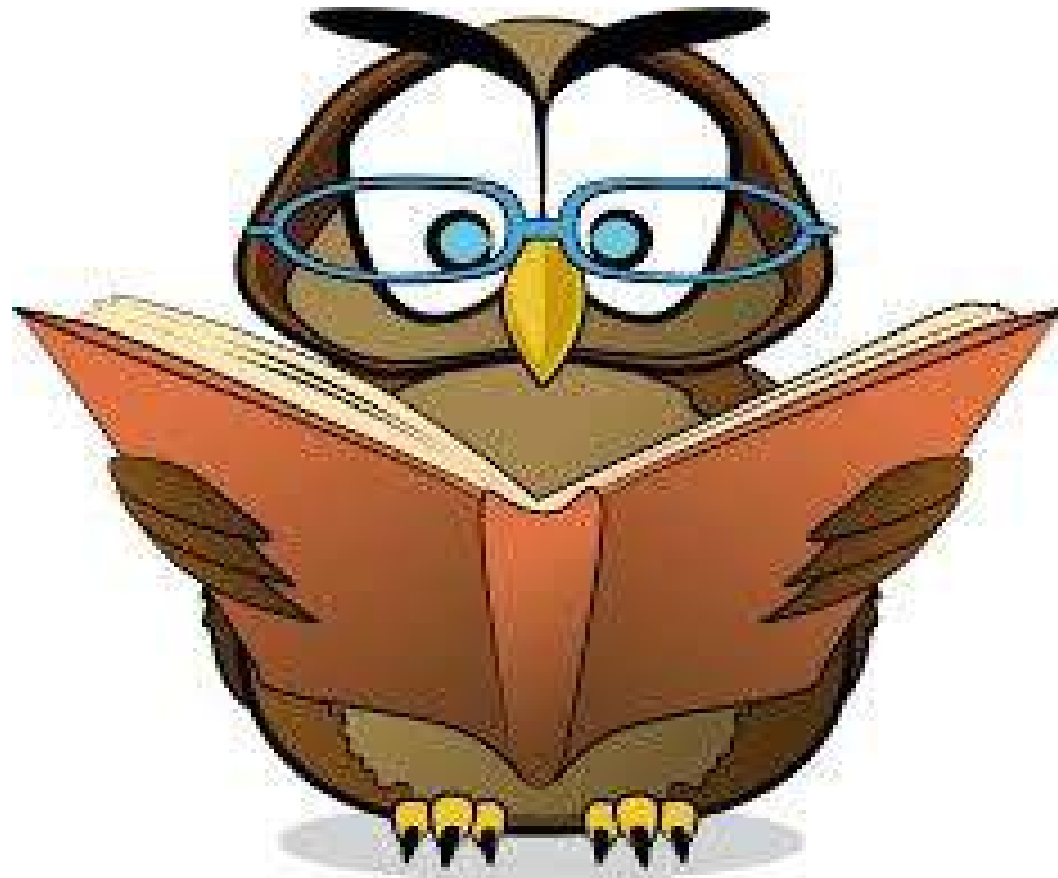
HOW DO I START A POLL FOR A TIME TO MEET?

Sign in

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

The screenshot shows the Office 365 Outlook interface. The 'New' dropdown menu is open, showing options: 'Calendar event', 'Poll for a time to meet' (highlighted with a red box and a red arrow), 'Email message', and 'Birthday event'. The calendar view shows September 2017, with the 22nd highlighted. The date range '7-23, 2017' is visible next to the dropdown menu.

ALWAYS READ TERMS Of
SERVICE



ENCRYPTION



◆ www.sookasa.com

◆ www.boxcryptor.com

◆ www.spideroak.com



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



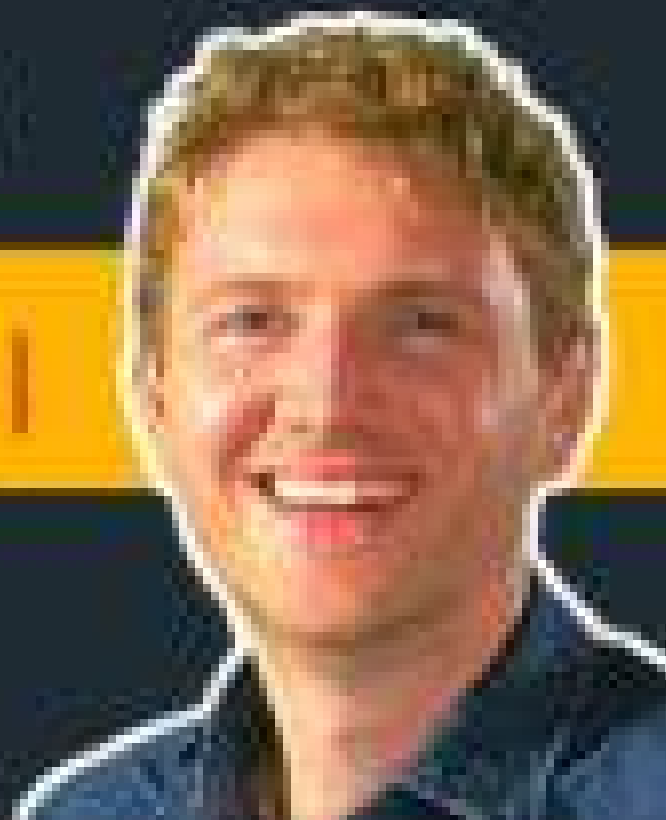


A note on extra security measures

COMPLETE

LastPass...

TUTORIAL



Email SCAMS



LAW FIRM ^{AV}

MARKETING ST

Applicable Rules:

7.1 and 7.5

New Ethics Opinions LEO 370 and 371

Codes, regulations & other
jurisdictions can also apply.

Example:

Bergman v District of Columbia

DC Court of Appeals 08-CV-859




Marketing

The history.

Herd mentality.

Figuring out what works for you.



Just
BE
you

Marketing

◆ Your Entrepreneur Hat

◆ Change the approach

◆ Think Differently

◆ Know your client



10 Great Marketing Tips

- ◆ Relationship Building
- ◆ Find Help
- ◆ Mastermind Group
- ◆ Learn SEO/Social Media
- ◆ Use Free Directories

10 Great Marketing Tips

- ◆ Attend Networking Events
- ◆ Sponsor a Local Event or Charity
- ◆ Manage Your Public Relations
- ◆ Host Seminars and Events
- ◆ Become a Public Speaker



Remember the Plan: Business Plan will

- ◆ Discern your purpose
- ◆ Refine your message
- ◆ Locate the target
- ◆ Avoid overloading the message
- ◆ Give them the right message
- ◆ Follow-up
- ◆ Connect with clients

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

Problem Recognition Process

Potential
Client's
Problem
Recognition
Process

I've got a problem . . .

Maybe it will go away . . .

Can I solve it myself . . .

Do I need a lawyer . . .

Who is the right lawyer for me?

Develop the Marketing Plan

◆ Sample Plan for Marketing

THE MESSAGE

Talk about you

Or

Your Choice

The problems you solve

Avoid the Three **Deadly** Marketing Message Sins

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

Stand Out

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

Science of Persuasion

<https://youtu.be/cFdCzN7RYbw>



01

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

02

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

03

You should be informing and educating on the problems you solve

Develop the Message

Which is
more effective?

Juvenile Defense

Experienced Former Prosecutor

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

Thomas Wright, Esq

123 Sesame Street

Washington, DC 21115

www.websitehere.com

A close-up photograph of a person's head and shoulders. The person is wearing a blue shirt and has their hands clasped behind their head. They are wearing metal handcuffs on both wrists. The background is dark and out of focus.

This is Serious

No one thinks their child will
end up here.

For HELP when the
unthinkable happens call.

Thomas Wright

Attorney at Law

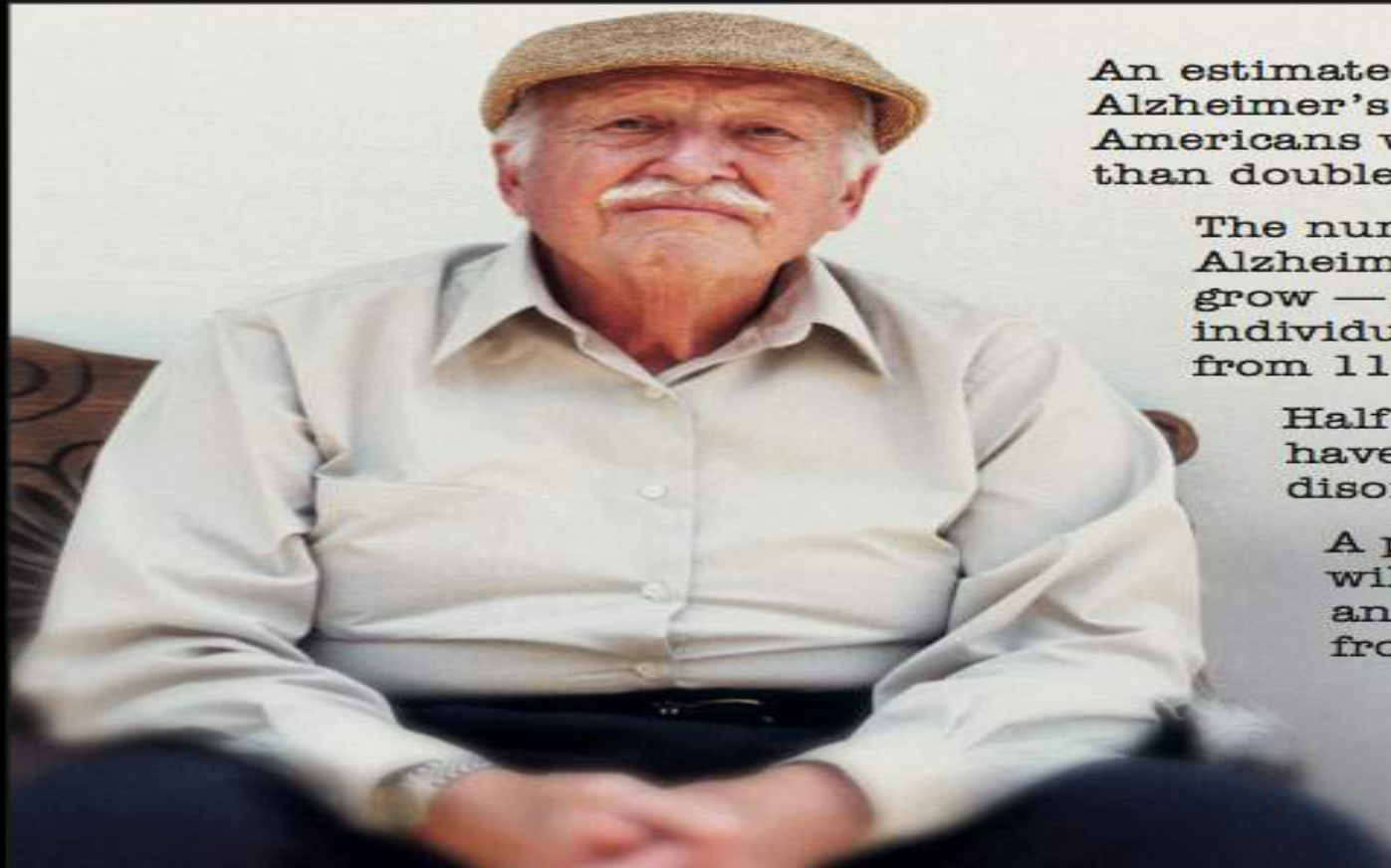
555-555-1212

Ask yourself...

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

Or is your writing all about you?

"Dad Couldn't Remember How To Get Home."



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

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

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

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

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

(Source for all statistics: Alzheimer's Association, www.alz.org)

The answers to the legal and financial challenges posed by Alzheimer's disease can only be answered on an individual basis by an attorney whose practice is concentrated on elder law, Medicaid planning, and estate planning.

The Elder Law Firm of Marshall & Associates is known throughout Pennsylvania for the expert help they provide seniors who are faced with long-term care needs.

Take The First Step

Call today to reserve a place at one of our free seminars for seniors, their families, elder care professionals, and caregivers. Each presentation lasts about 90 minutes, including a "Question & Answer" session.

Elder Law Firm of **Marshall & Associates**

Jersey Shore Office

303 Allegheny Street, Jersey Shore, PA 17740-1405
(570) 398-7603 (800) 401-4552

Williamsport Office

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

Wilkes-Barre Office

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

Information vs. Legal Advice

◆ Miranda Example:

◆ You have the right to remain silent

◆ Vs.

◆ Never talk to the police

Marketing

- ◆ All marketing works - some just better than others
- ◆ 80% of new business comes from 20% of your existing clients. How do you get more 20% clients?
- ◆ Jump start marketing (handout)

ENGAGE

What does *process focused*
Marketing do?

Some examples of
process focused sites:

www.virginiadivorceattorney.com

www.rosen.com

www.jerseyestateplanning.com

www.bobbattlelaw.com

www.oginski-law.com

www.paestateplanners.com

How do I get a Divorce in North Carolina?



ABSOLUTE DIVORCE



CHILD SUPPORT



CHILD CUSTODY



PROPERTY DIVISION



ALIMONY



DOMESTIC VIOLENCE



MEDIATION



DIVORCE & TAXES



RETIREMENT



ENTREPRENEURS



SPOUSAL SPYING



LAWYER LOCATOR

Get answers at the webinar

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



Free attorney advice

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



<https://vimeo.com/168929480>



What Most Lawyers Do...

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

Trust Me, I'm A Lawyer!

(My Dogs Do)

Robert (Tito)
Meyer

Free Consultation For:

- Truck, Car & Motorcycle crashes
- Wrongful Death

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Work Injury Attorney

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Prosecutors and Other Reptiles
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*plus filing fees

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Special Only
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you can
afford!

The "Q" Firm
Quality

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

No Evidence

No Conviction!

This is an
advertisement



Dealt a Bad Hand? Play Your Cards Right...

The Magic Lawyer[®]

**Robert
SPEER**

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themagiclawyer.com



MAYBE THIS
INSTEAD

Process Focused Marketing

Reason To Make An Estate Plan #10

Your son-in-law,
Fred

- Hasn't had a job since 1999
- Belongs to a religion that you consider a cult
- Sells t-shirts at concerts by a band called "Phish"
- You suspect he is fond of chemical substances
- Thinks it's great that he has rich in-laws

Is he going to get
half of what you leave
to your daughter?



Do not miss this FREE seminar!
Two days only. Seating is limited.

Wednesday, February 15, 2006
10:00am-11:30am
The Lodge at Rancho Mirage
68-900 Frank Sinatra Drive
Rancho Mirage

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

Refreshments Served

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



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

Process Focused Marketing

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

Your mother-in-law, Barbara

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



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

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



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

***Your legal case is no place
for on the job training.***



***Call the right lawyer.
(706) 543-0002***

Who lawyers say is their Competition:

◆ 67% - other law firms of similar size

◆ 49% say significantly larger firms

◆ 13% pro se

Where do you market?

- ◆ How many different ways could someone who needs to know what you know find you?
- ◆ How hard are you making it for your best client to find you?

You & your presence



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

Your office

Business card

Website (video)

Newsletter

Marketing
Opportunities

01

Blog

02

Brochure

03

Social media

04

Speaking
engagements

05

Books/ free
publications

More Marketing Opportunities

Elevate Your Practice

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

[Get Started](#)

Now merged - Clio Grow

Don't get Comfortable!

◆ How you treat your best client:

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

Remember

- ◆ The best advertising for your law firm will come from a happy client
- ◆ Make your client's case your case...make it personal.



Business Cards

The Website

Website



Must have website

◆ You can do the work yourself:

◆ <http://rollinsandchan.com/>

◆ www.weebly.com

◆ www.wix.com

◆ www.wordpress.com

◆ www.directlaw.com

Use a Service

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

Unique, relevant content

Link equity

An old domain name

SEO

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

Search living trust or I need a will

Marketing:
Website



Marketing: Mobile Website

Mobile website? www.dudamobile.com

Thumb-friendly design;

Create for visibility & simplicity;

Click-to-dial phone number;

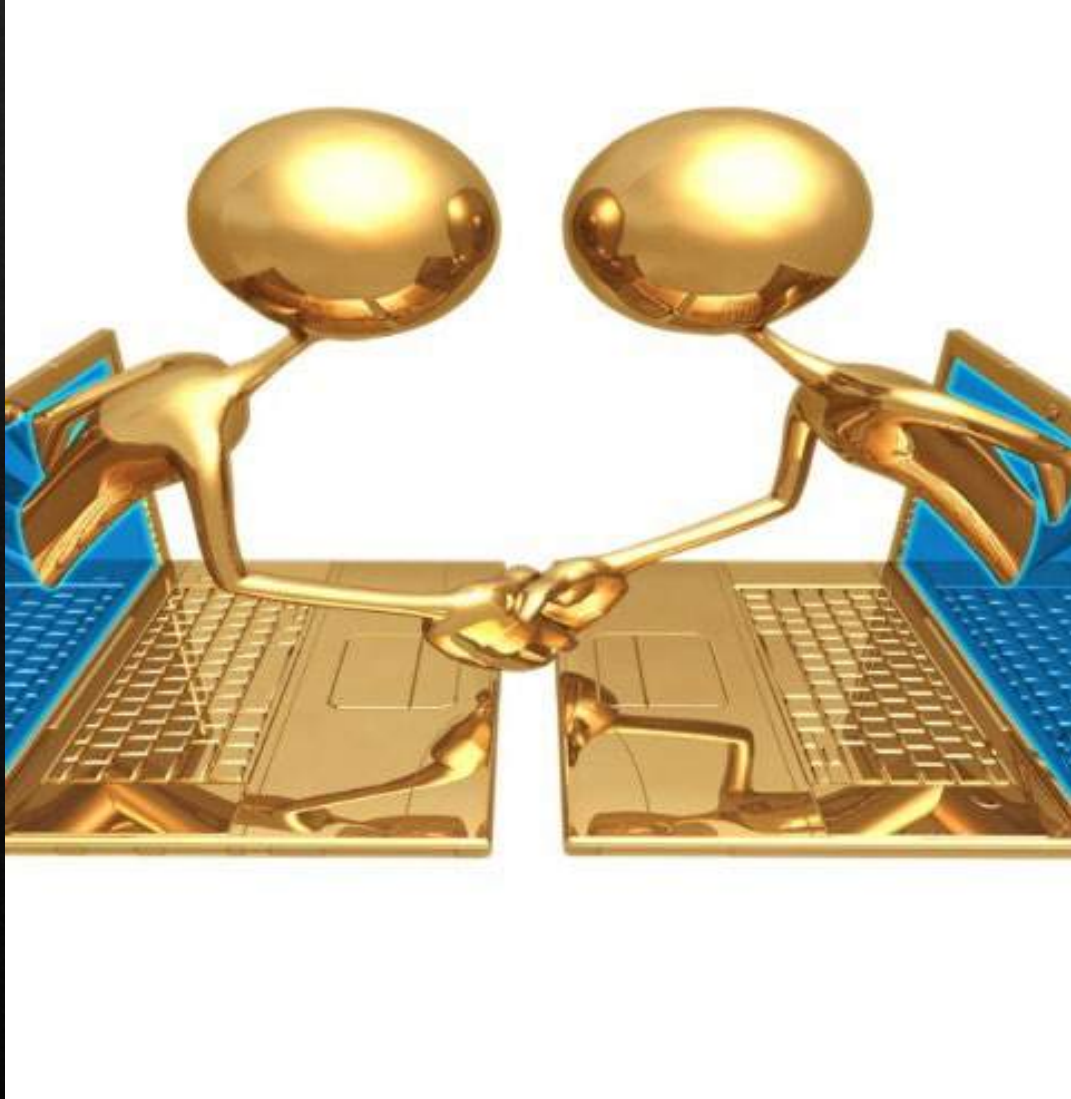
No more than 7 main navigation buttons



Before



After

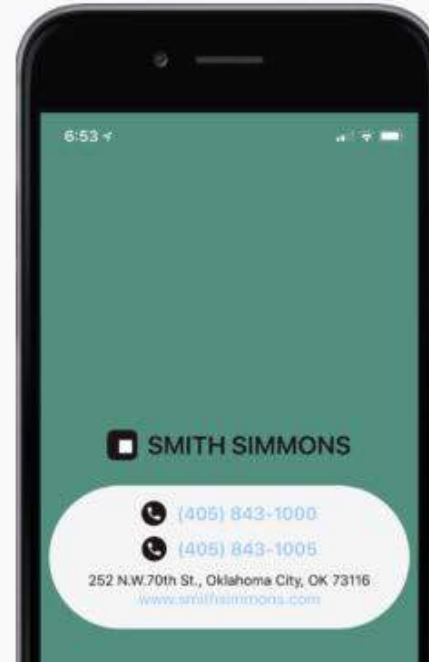


Marketing: Internet

- ◆ Use Free Listings:
- ◆ Google, Yahoo, Bing, MSN, AOL, Yellowpages, Yellowbook and more....

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

The app your clients have been asking for.



Yourfirmapp.com

Newsletter

1. Talk about ideal client's problem



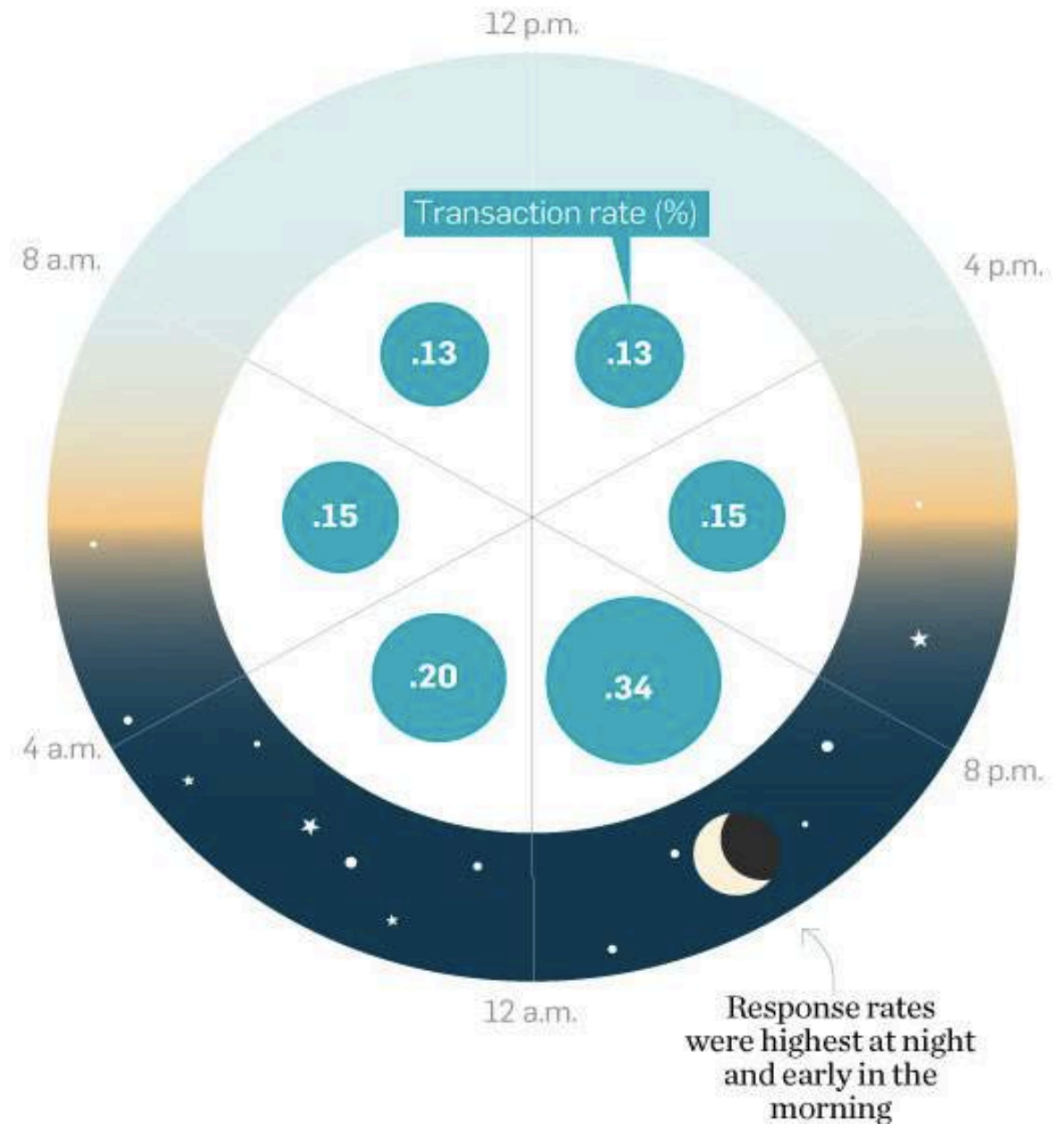
2. Directed to the potential client



3. Your solution reaches the problem

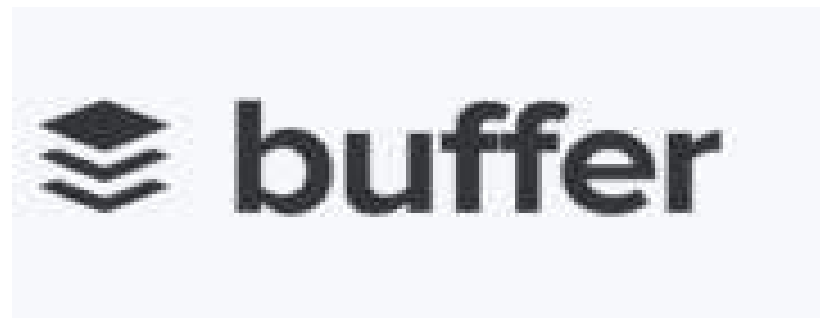
Newsletter-Timing

- ◆ What is the best day of the week to send an electronic newsletter?
- ◆ Conventional wisdom - Tuesday night;
- ◆ New approach - Saturday night. Why?





MailChimp



Marketing Tools

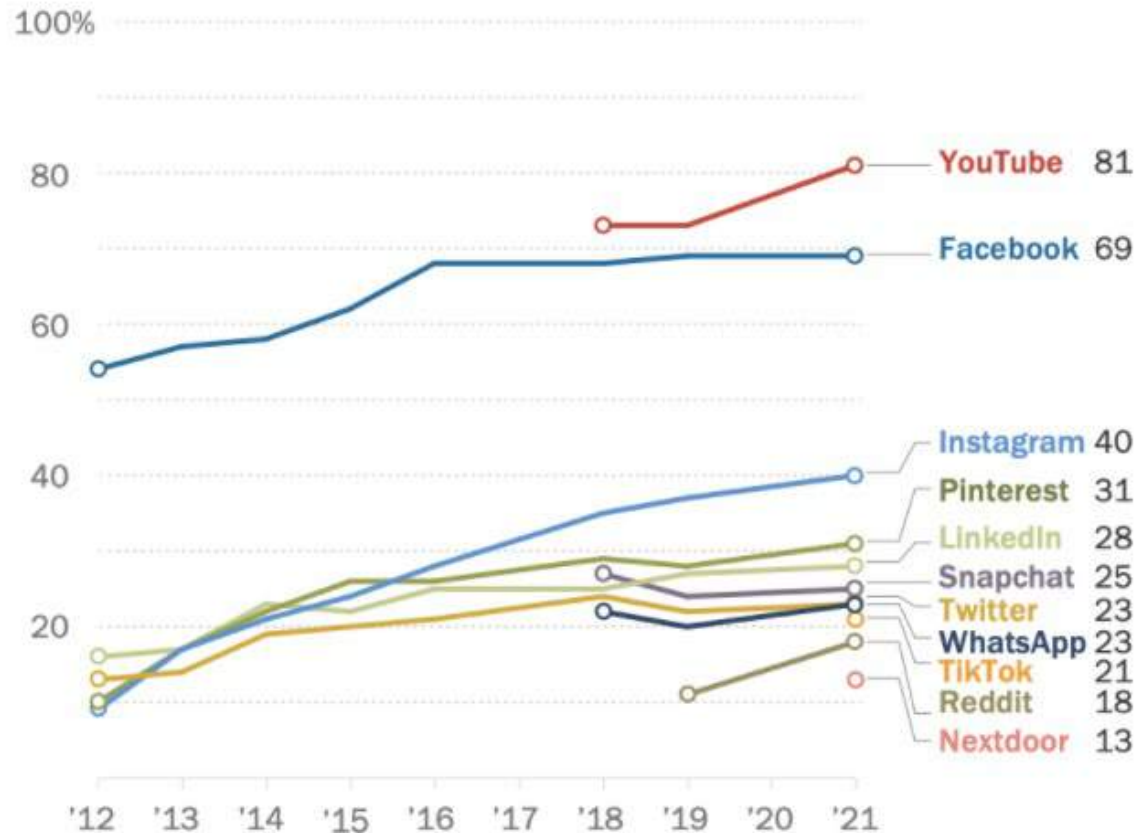
Customer
Relationship
Management
Software

keap



Growing share of Americans say they use YouTube; Facebook remains one of the most widely used online platforms among U.S. adults

% of U.S. adults who say they ever use ...



Note: Respondents who did not give an answer are not shown. Pre-2018 telephone poll data is not available for YouTube, Snapchat and WhatsApp; pre-2019 telephone poll data is not available for Reddit. Pre-2021 telephone poll data is not available for TikTok. Trend data is not available for Nextdoor.

Source: Survey of U.S. adults conducted Jan. 25-Feb. 8, 2021.

"Social Media Use in 2021"

PEW RESEARCH CENTER

Worst Lawyer Video

Lawyers and
Video:
Thoughts?

Video Marketing

www.pixability.com

www.fairfaxvideostudio.com

www.oginski-law.com

www.crispvideo.com

Maybe this instead

- ◇ Animated marketing video

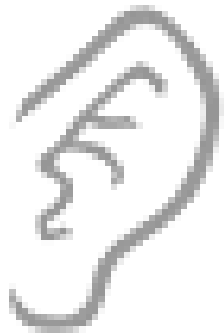
- ◇ https://www.youtube.com/watch?v=HC_xpwyrE80

- ◇ <http://www.yourcharlesalexander.com/>

Lawyer Video Examples

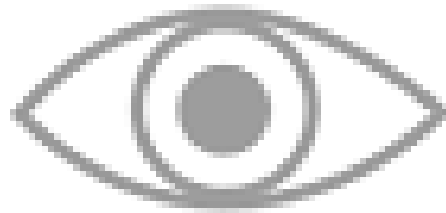
- ◆ How to apply for a work visa:
<http://www.youtube.com/watch?v=sUWG2MJWJ0A&feature=fvsr>
- ◆ How do I file bankruptcy:
http://www.youtube.com/watch?v=aHAycjv_MM
- ◆ How to file a legal separation:
<http://www.youtube.com/watch?v=oi-y9s4OhEo>

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



20%

20% of what they hear



30%

30% of what they see



70%

An amazing 70% of
what they see & hear!

Create a great logo



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

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

A FEW FINAL WORDS

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



One Practice Area

High quality work product

To Make It
Work

Be the expert

Build Your Network



who's in your network?



Thursday, July 15, 2021

Law Firm Automation ■ Ethics ■ Wellness ■ Marketing
Join us virtually and revolutionize the way you manage your law firm.

FREE to D.C. Bar Members

Network

Build a system for
engaging

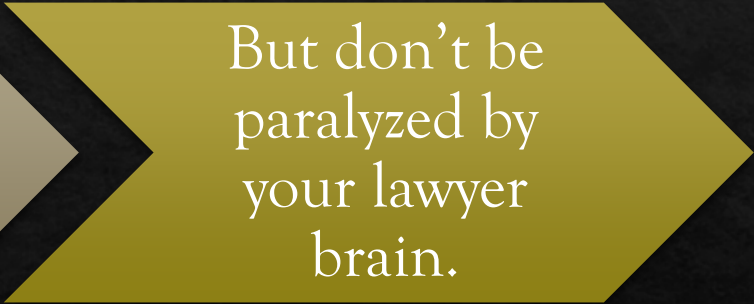
Create and Feed your
network

Follow up

Be Bold....



Follow the rules



But don't be
paralyzed by
your lawyer
brain.

Lunch and Learn

Practice Management Advisory Service



- ◆ Thursday, May 27 at Noon, Next Level Online Oral Communication & Advocacy Skills

Networking Opportunities

- ◆ Friday, May 28th at noon. RSVP to rsjillions@gmail.com
- ◆ Friday, June 11, 12:30 p.m. RSVP to steven@stevenkriegerlaw.com

Thank You!

Rochelle D. Washington



Contact Me

- ◆ D.C. Bar Practice
Management Advisory Service
- ◆ 901 4th Street
- ◆ Washington, DC 20001
- ◆ 202-780-2764
- ◆ rwashington@dcbar.org

More Marketing Resources

The Culture Code by Clotaire Rapaille

Influence, the Psychology of Persuasion
by Robert B. Cialdini

Contagious, Why Things Catch On by Jonah Berger

You Can't Teach Hungry by John Morgan

Great Legal Marketing by Ben Glass
([Request the book - it's free](#))

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