Day 2 Topics

LAW FIRM MANAGEMENT

CLIENT RELATIONS

MARKETING

Regulation

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

New PMAS Offerings

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

DC BAR 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@stevenkniegerlaw.com

Lunch and Learn

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

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

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

Register

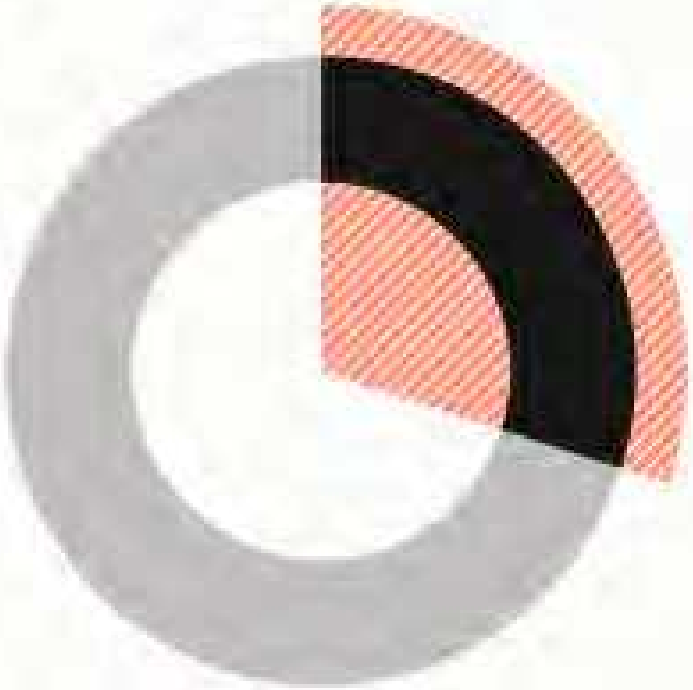
January 16, 2020
Running on Empty: Burnout in the Legal Profession, presented by Niki Irish of the D.C. Bar Lawyer Assistance Program.

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

Sign up to receive our PMAS Practice 360° Newsletter

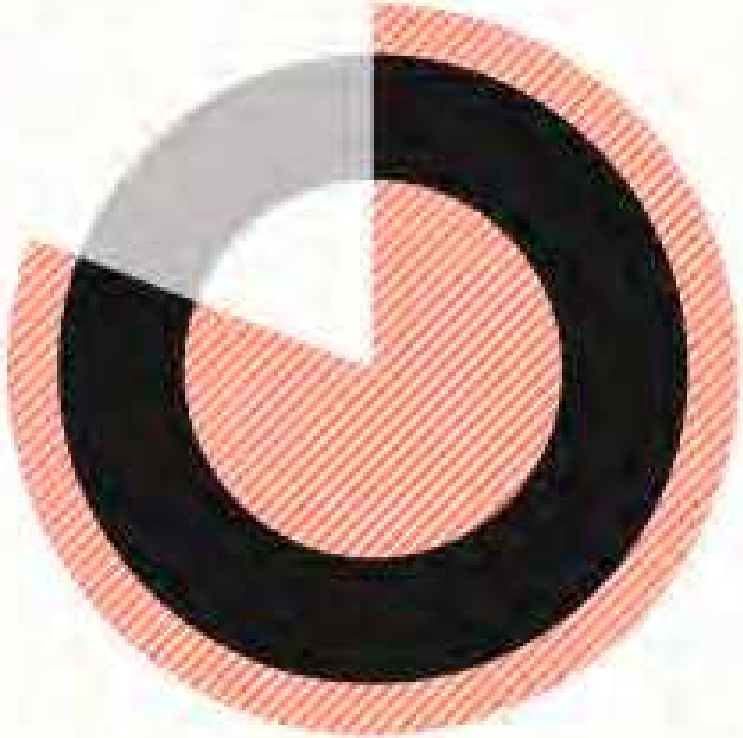
Law Firm Management

Utilization rate



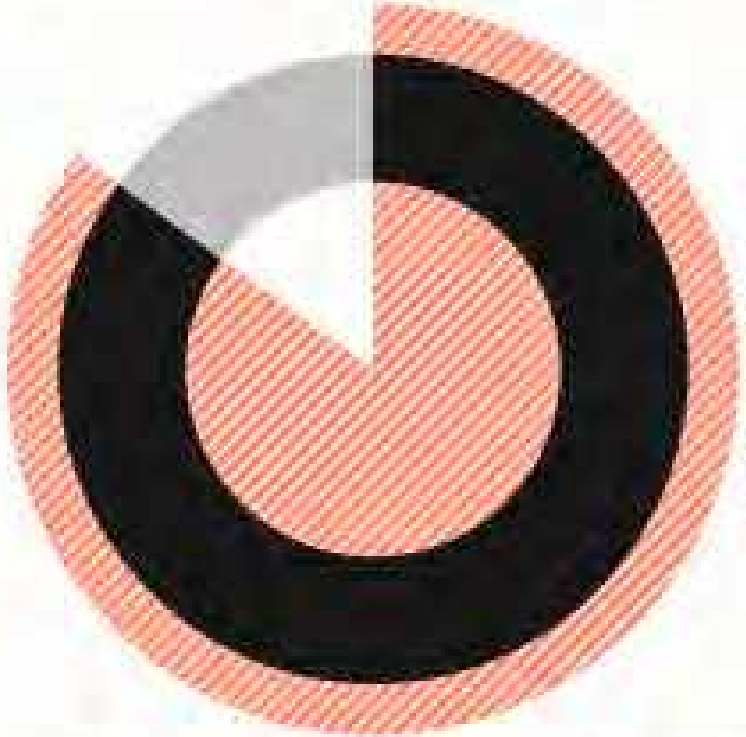
Number of billable hours worked ÷ number of hours in a day = **31%**

Realization rate



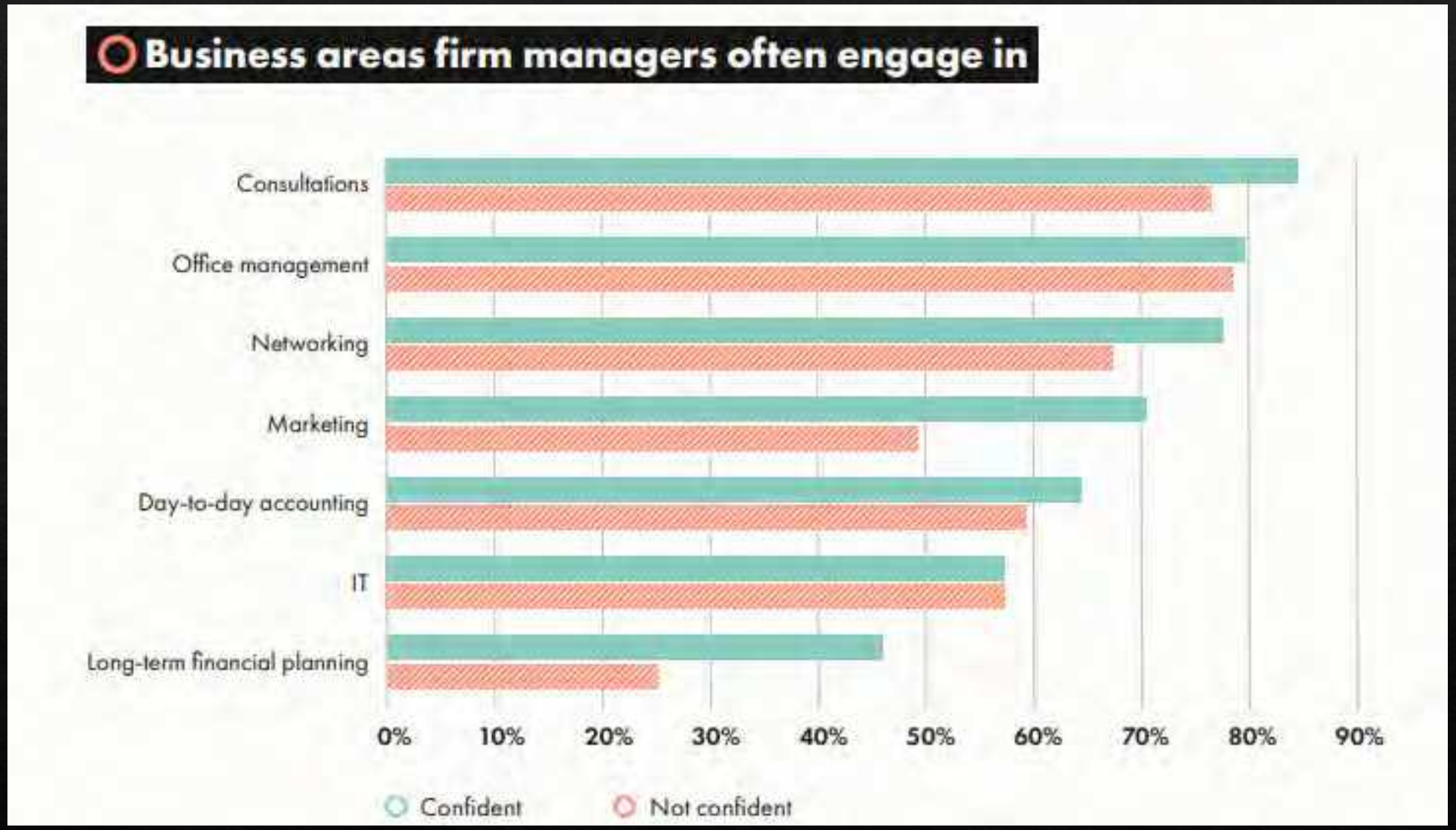
Number of billable hours invoiced ÷ number of hours worked = **81%**

Collection rate



Number of hours collected ÷ number of hours invoiced = **86%**

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


Business areas firm managers often engage in
Consultations
Office management
Networking
Marketing
Day-to-day accounting
IT
Long-term financial planning
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
Confident
Not confident

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/

What's in a name?

- Example:

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

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

File Set-up

- Fee Agreement
- New matter info sheet
- Case notes
- Telephone messages
- Log
- Discovery docs
- Expense log

Blank New File Folder

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

DEVICES
- Sam's Mac...
- Remote Disc

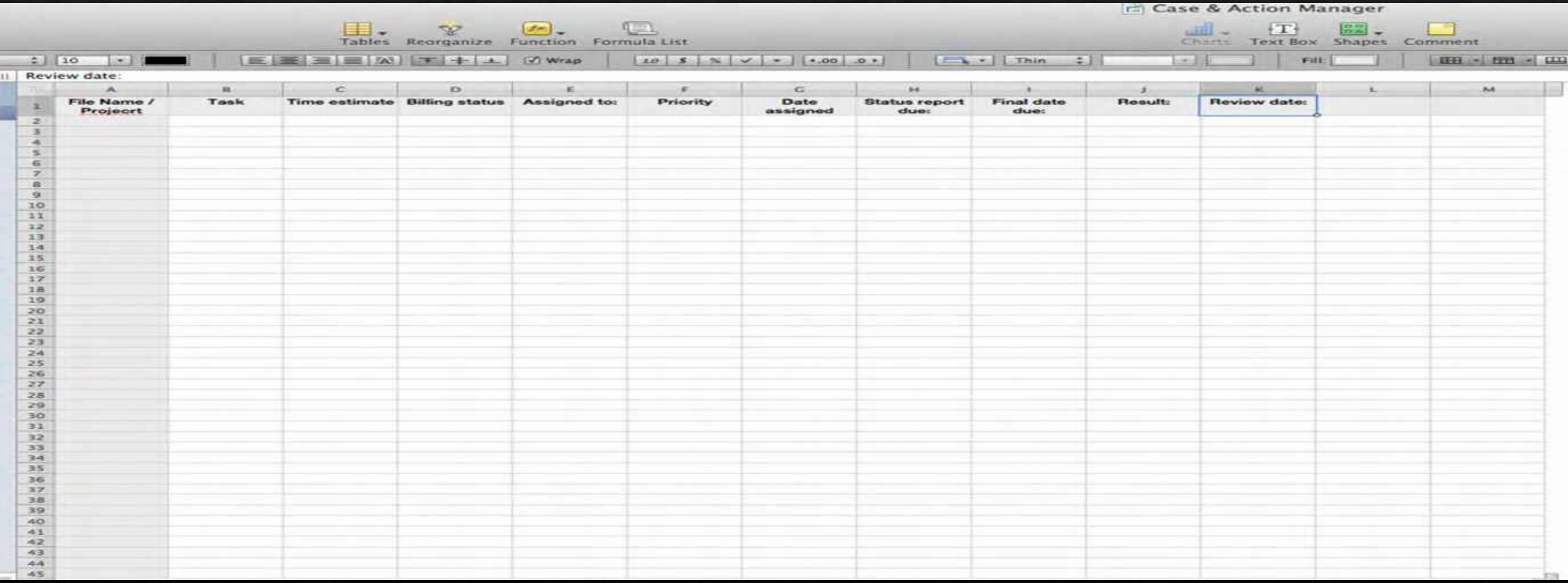
SHARED

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



Calendar/Docket

- 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

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

Presentation means something

Make them easy for client to understand what is owed

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

Invoice Timing

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

A Few Suggestions:

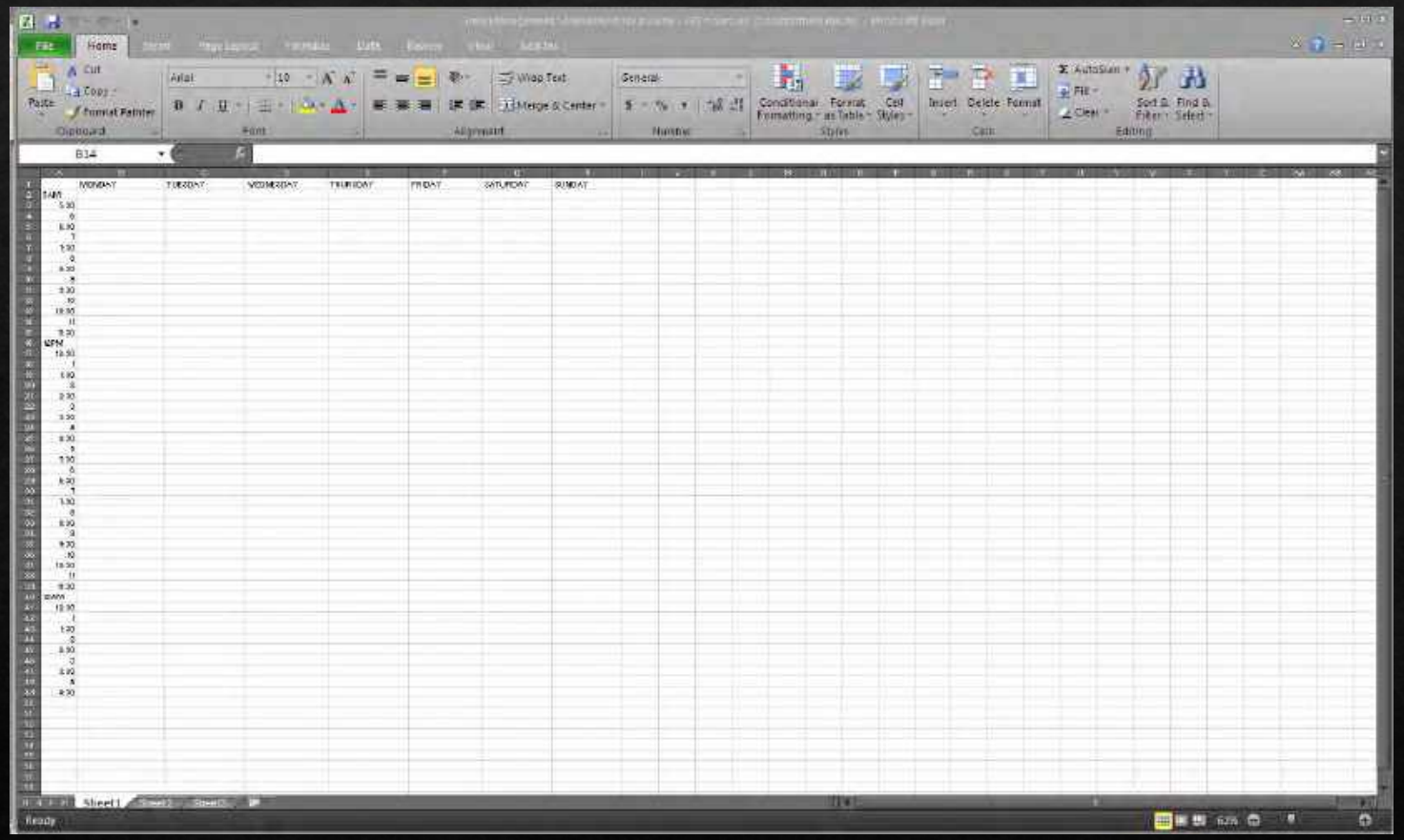
- Resist billing for more than two hour blocks for work. (break up the entries)
- Total up smaller entries (avoid appearance of nickel and diming)
- When invoice is larger than normal send before normal cycle to give client a heads up

A Few Suggestions:

- Avoid Duplicate entries
- Provide Dispute Options
- Automate!

If they do not pay:

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

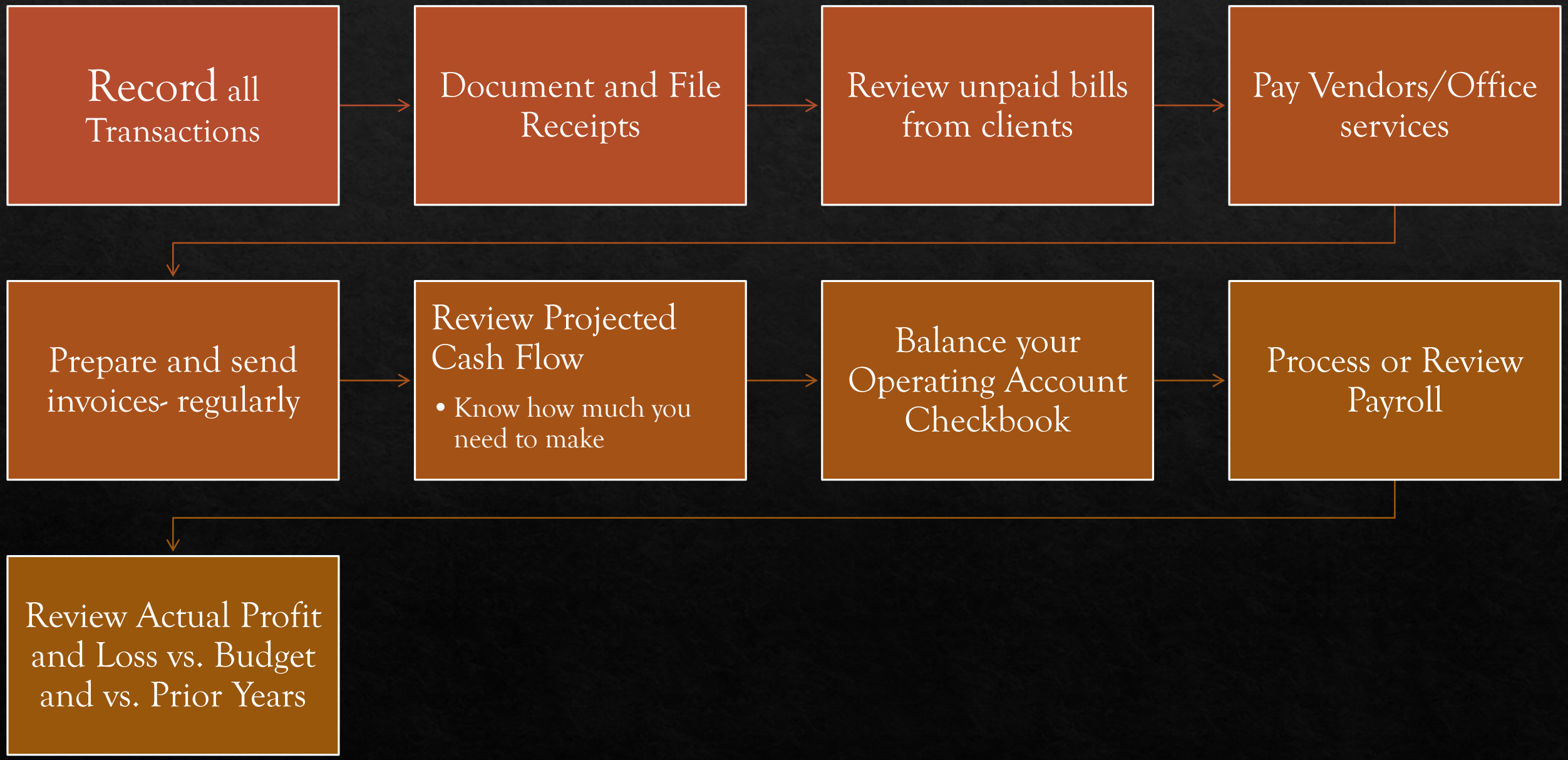


Time Management Sheet

Office Accounting Procedures

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

Accounting Tips



Productivity

1

The simple secret to productivity

2

Block out Time - important times for all ongoing task

3

Being disciplined

Managing time . . .

Working smarter . . .

How do you work the most efficiently and effectively

What are the tools you need

1. Name your workflow

2. Identify Start and End Points

3. Identify what is need to perform the process

4. List any task and activities

5. Identify the order task should be accomplished

6. Identify roles

7. Identify your flowchart type and draw it out

8. Review and finalize

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

Create Workflows

TECHNOLOGY
IS
Key

Introducing A New Name: Business & Tech.

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

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

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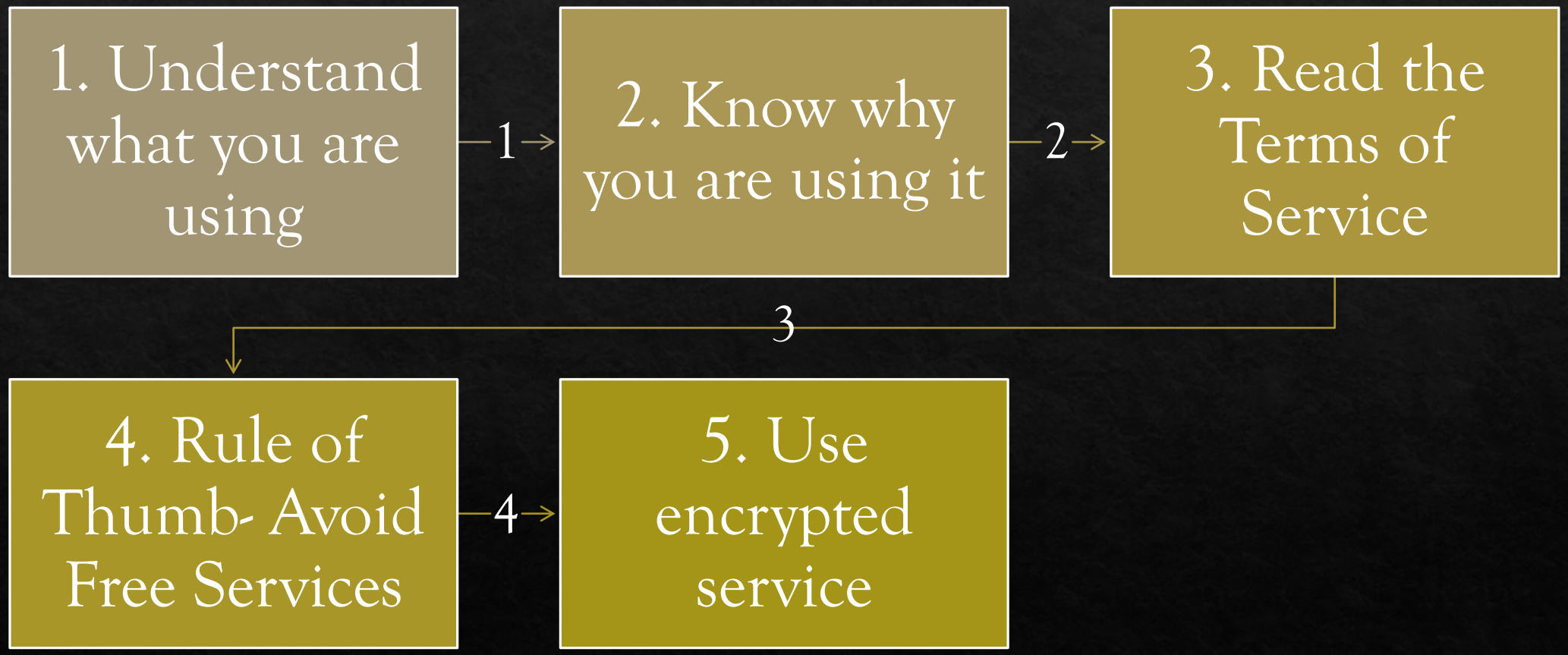
The Wall Street Journal declared "Every business is a technology business."

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

netdocuments

Document Management System

Cellphone

Printer/Scanner/Copier

CARR WORKPLACES

Virtual Office

Conference/meeting room

Website

GoDaddy

Email/web hosting

Clio

Case Management

Back Office Betties

Answering Service

CARR WORKPLACES

METROFFICES
How Will You Work Today? We Support That

wework

Regus™

OSIOFFICES

Virtual Law Firm

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

Monitors – the More the Merrier!

Printer and Scanner

And if you REALLY want to go Virtual…

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

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

Free 30 Day Trial

No Obligation. No credit card required.

Watch the Video:

Key Features of the DirectLaw Virtual Law Firm Platform

See How Our Document Automation Solution Works Inside the DirectLaw Platform

Read the Whitepaper:

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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?

Selecting Your Product

- 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

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/

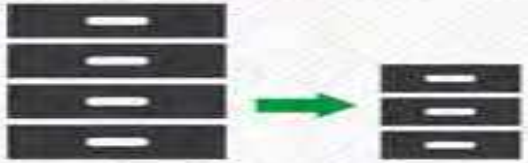
BENEFITS AND SAVINGS

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

iMazing

Features Reviews Download Enterprise Store Support Blog

Get iMazing

Manage your iPhone. Your way.

Get a trusted software to transfer and save your music, messages, files and data. Safely back up any iPhone, iPad or iPod touch. Powerful and user-friendly, iMazing is simply the best iOS device manager for Mac and PC.

Free Download | Buy Now

iOS 13

Press about iMazing

SAAS vs. Software on PC

Basic Technology for Lawyers

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

CASE MANAGEMENT

GET SMART

Clio

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

User reviews: 1,023
Average rating: 4.7

VISIT WEBSITE

LEARN MORE

MyCase

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

User reviews: 310
Average rating: 4.7

VISIT WEBSITE

LEARN MORE

PracticePanther

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

User reviews: 323
Average rating: 4.78

VISIT WEBSITE

LEARN MORE

Aderant Expert ...

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

User reviews: 7
Average rating: 4.43

VISIT WEBSITE

LEARN MORE

LegalEdge

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

User reviews: 0
Average rating: N/A

VISIT WEBSITE

LEARN MORE

Actionstep

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

User reviews: 91
Average rating: 4.41

VISIT WEBSITE

LEARN MORE

Zola Suite

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

User reviews: 99
Average rating: 4.63

VISIT WEBSITE

LEARN MORE

CosmoLex

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

User reviews: 276
Average rating: 4.73

VISIT WEBSITE

LEARN MORE

Click here

G Suite vs 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

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

CLOUD FILE MANAGEMENT

OneDrive

citrix ShareFile

box

Dropbox

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.

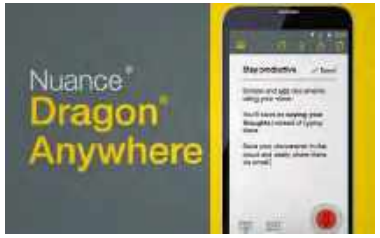
Dragon Professional Individual

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!

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

IRON MOUNTAIN

CARBONITE™

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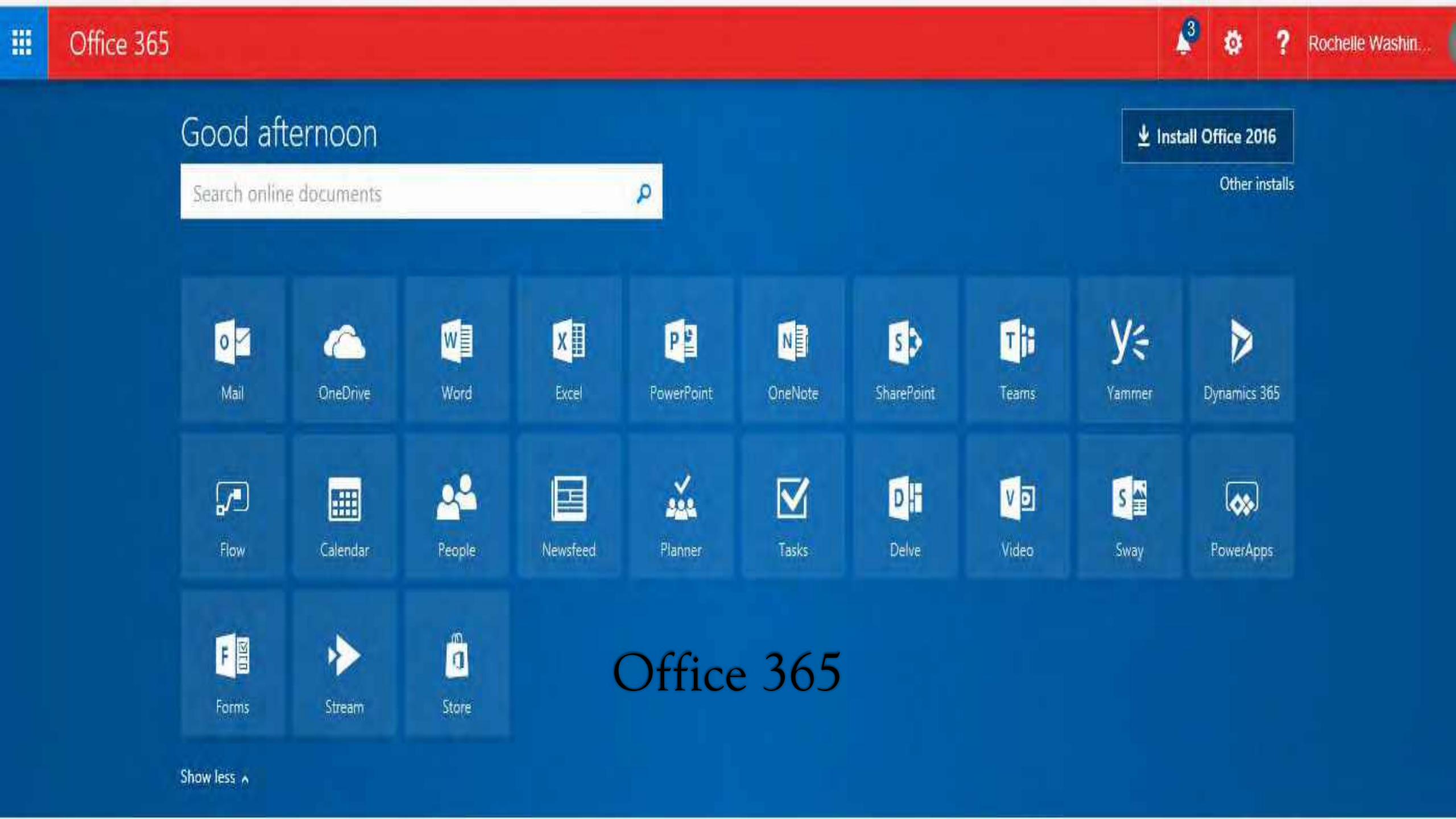
- www.carbonite.com
- www.ironmountain.com

mozy® BY EMC


Office 365
3
Rochelle Washin...
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
Show less

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) [3]

Services included

Exchange, OneDrive, SharePoint, Teams

Not just Microsoft

Dropbox

Doodle®

17hats

asana

zoom

zapier

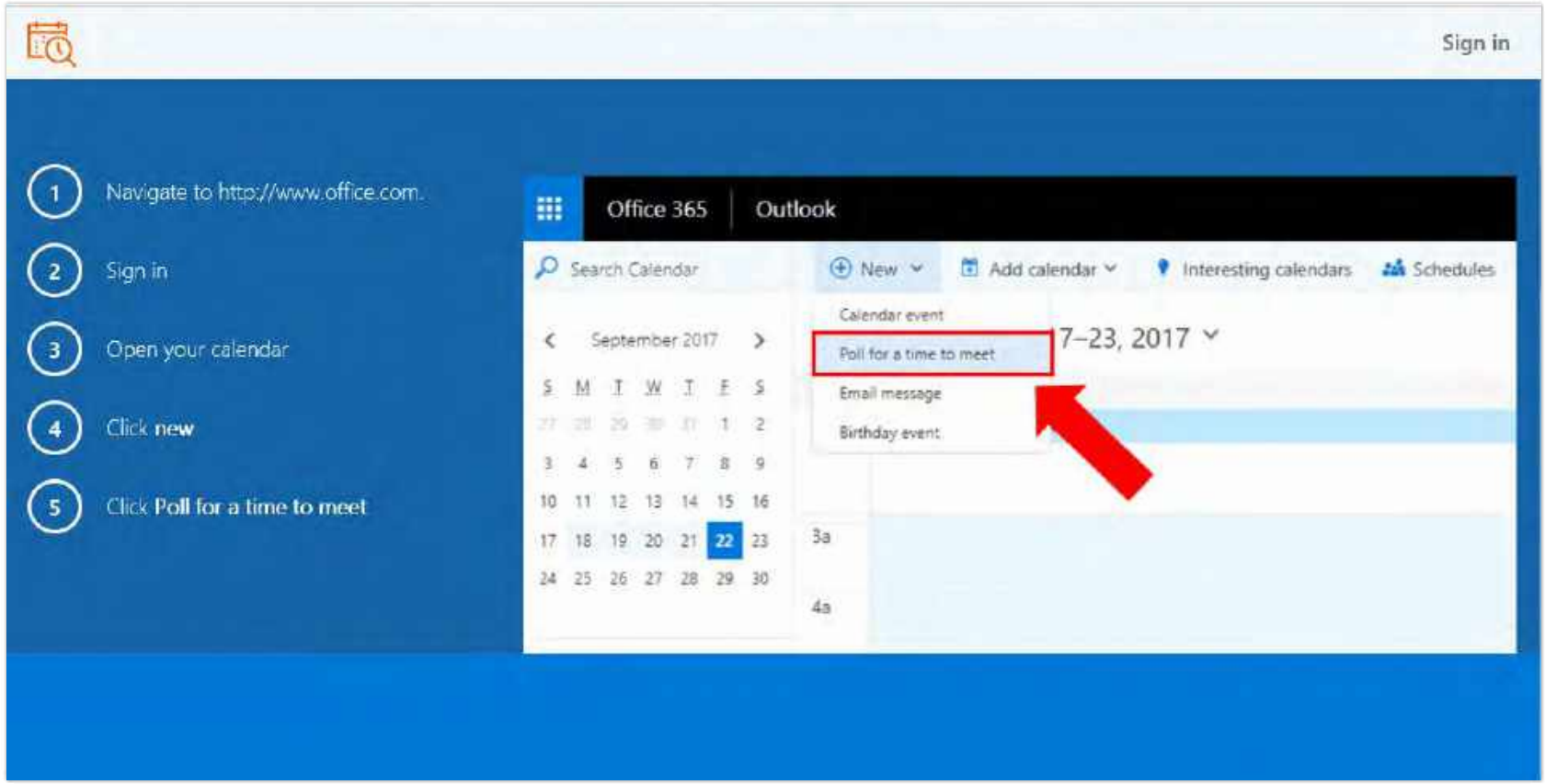
slack

EVERNOTE

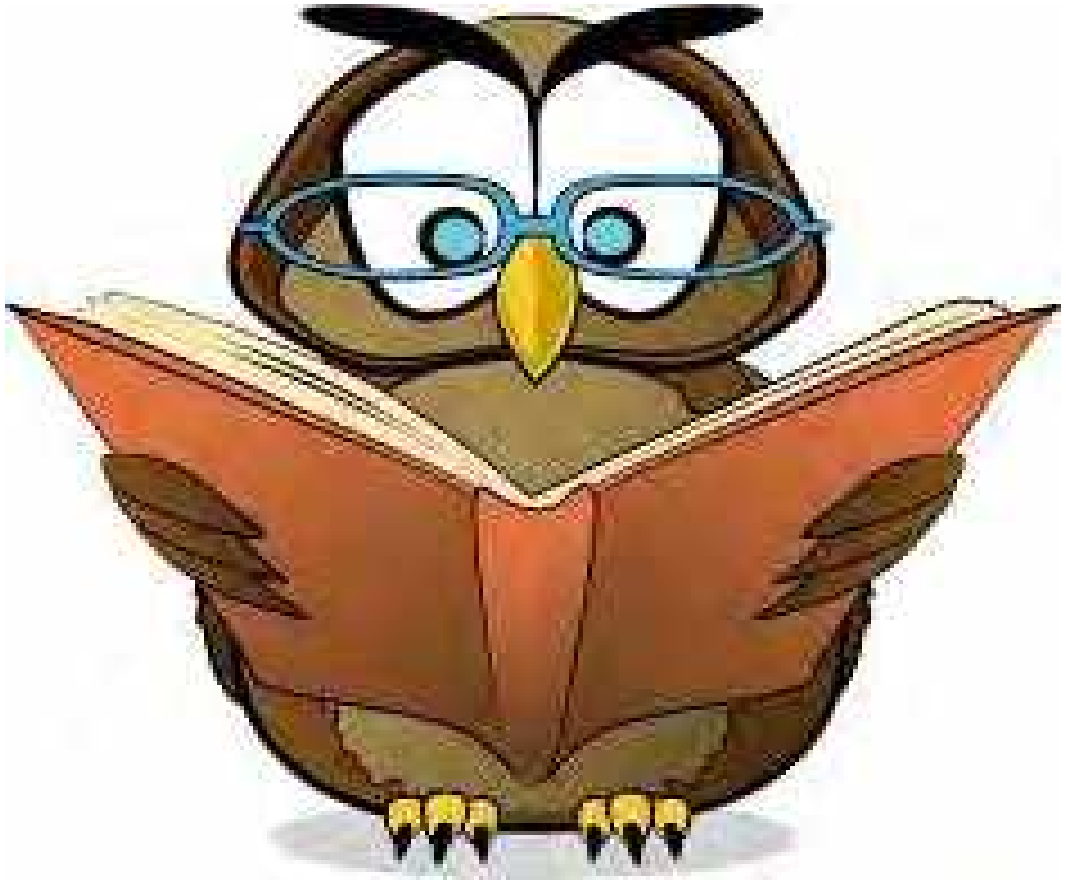
SurveyMonkey

Appointment Scheduling

Find Time*
(this will be rereleased and renamed October 2017



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

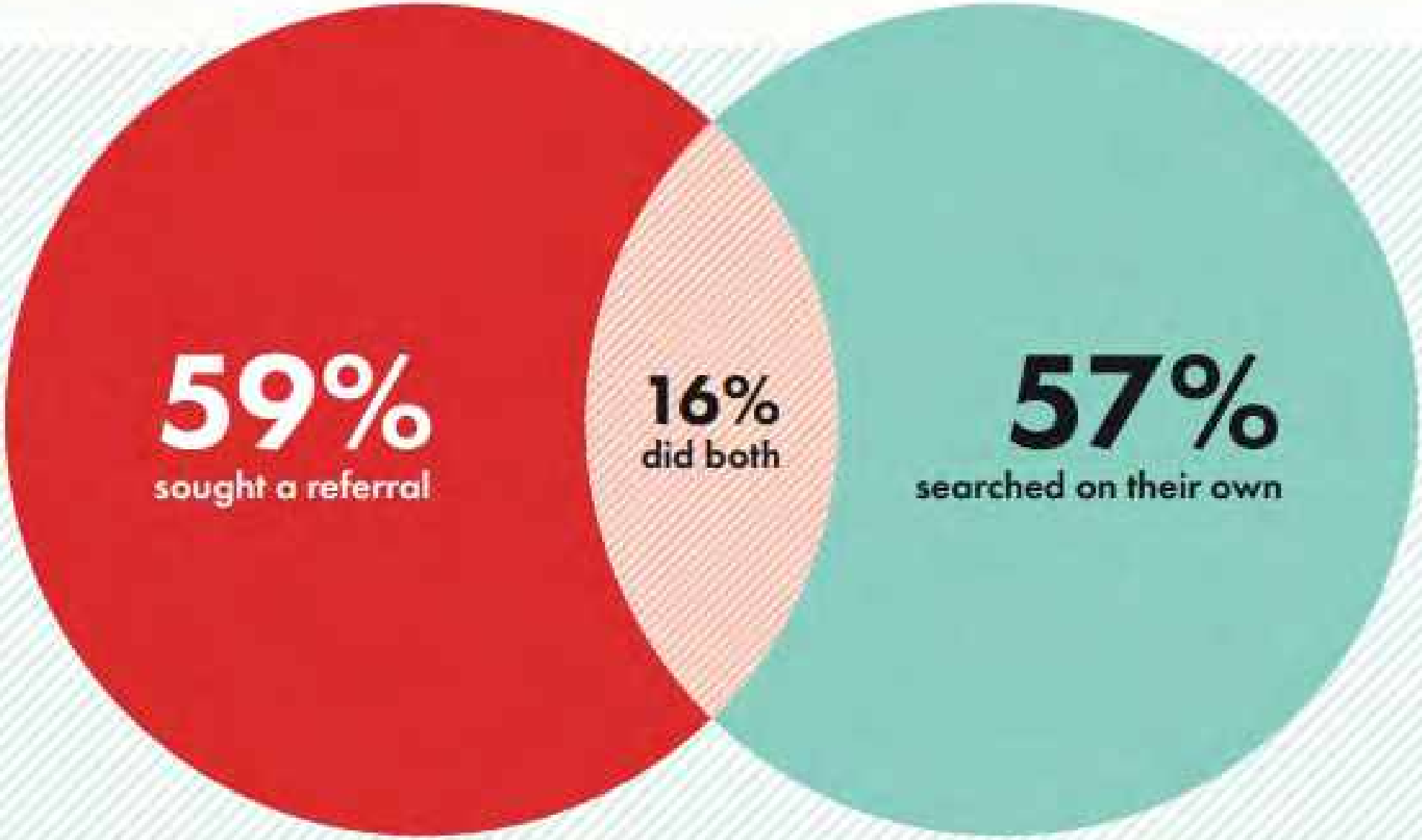
LASTPASS

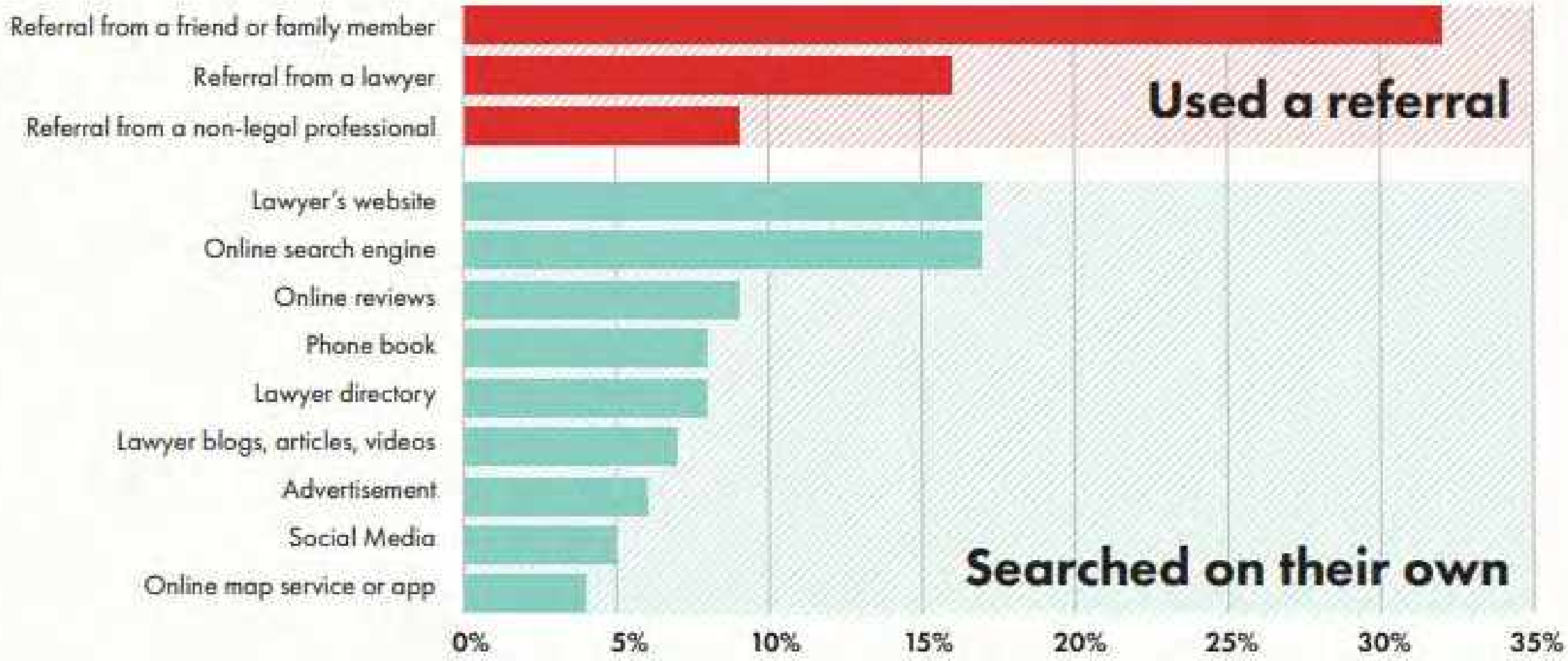
Email SCAMS

CONGRATULATIONS!
YOU'VE WON
£1,000,000
Not every scam is this obvious – learn how to stay ahead of the con men

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

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

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

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

What do clients look for?

Honesty/ Ethics Ratings

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

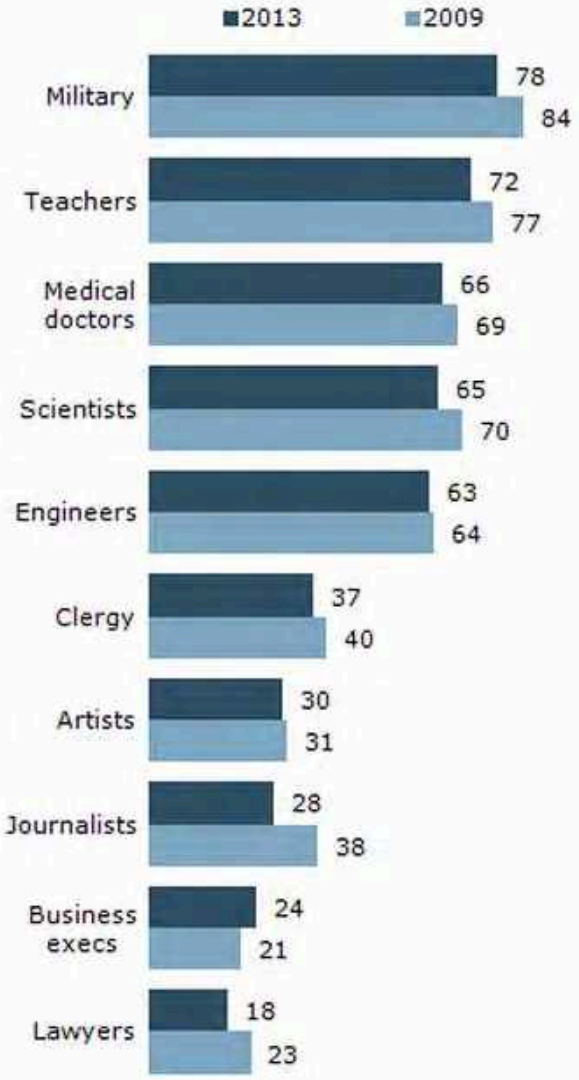
	Very High	High	Average	Low	Very Low
	%	%	%	%	%
Nurses	29	55	13	2	1
Pharmacists	15	52	26	6	2
Medical doctors	15	50	29	5	2
Engineers	13	52	29	4	1
Dentists	10	49	34	5	2
Police officers	16	42	29	10	3
College teachers	10	37	32	12	6
Clergy	12	32	39	9	4
Psychiatrists	6	32	45	9	3
Chiropractors	5	33	45	10	3
Bankers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

Dec. 7-11, 2016

GALLUP

Trend in Perceived Contribution

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



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

PEW RESEARCH CENTER

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

http://www.abajournal.com/lawscribbler/article/do_lawyers_really_suck_no_potential_clients_antipathy_can_be_overcome

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

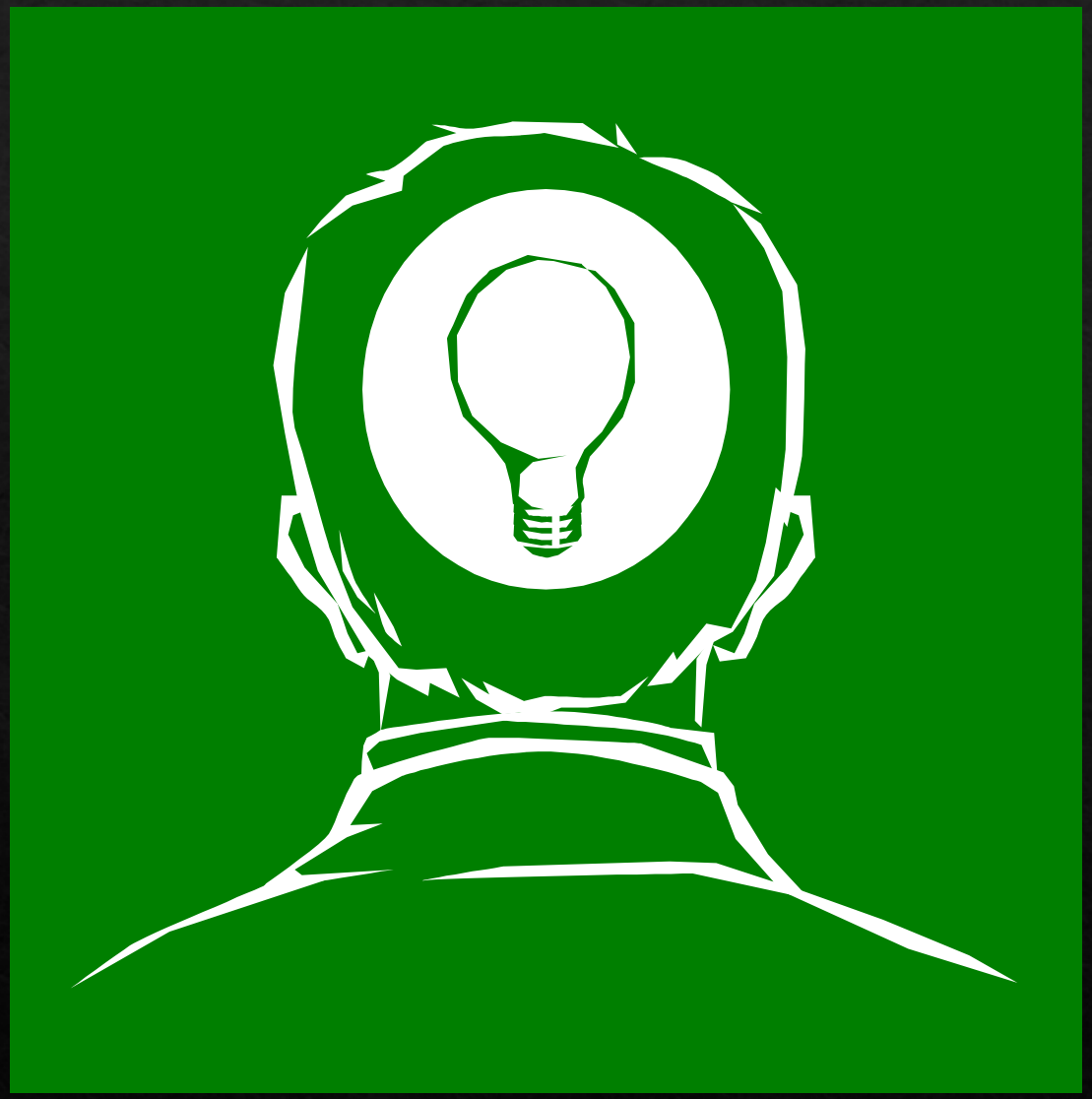
1. Solve the problem
2. Remain Ethical
3. Exceed expectations
4. Develop a referral source
5. Make a profit

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

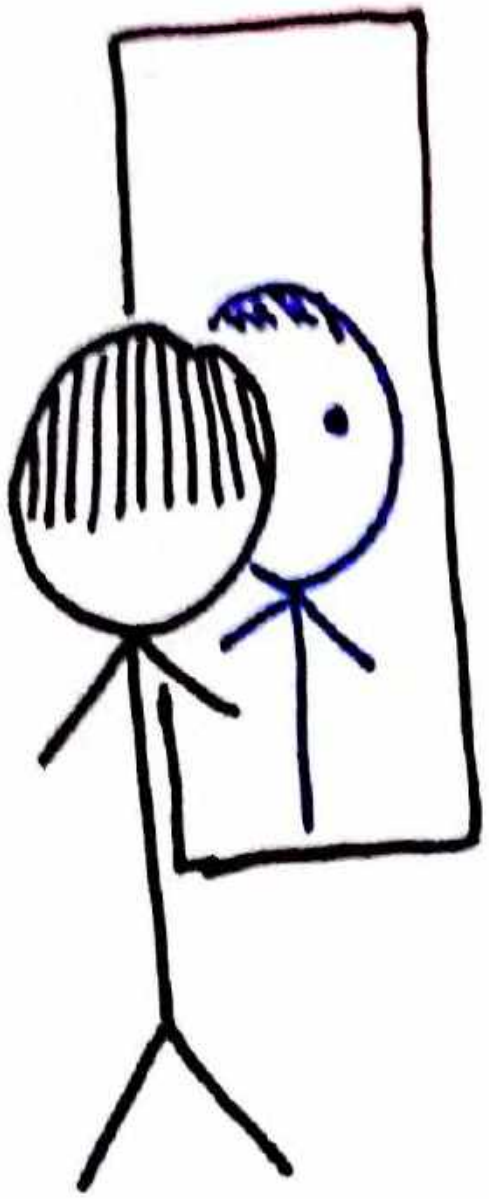
3. Needs Assessment

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

4. Summarize/Restate

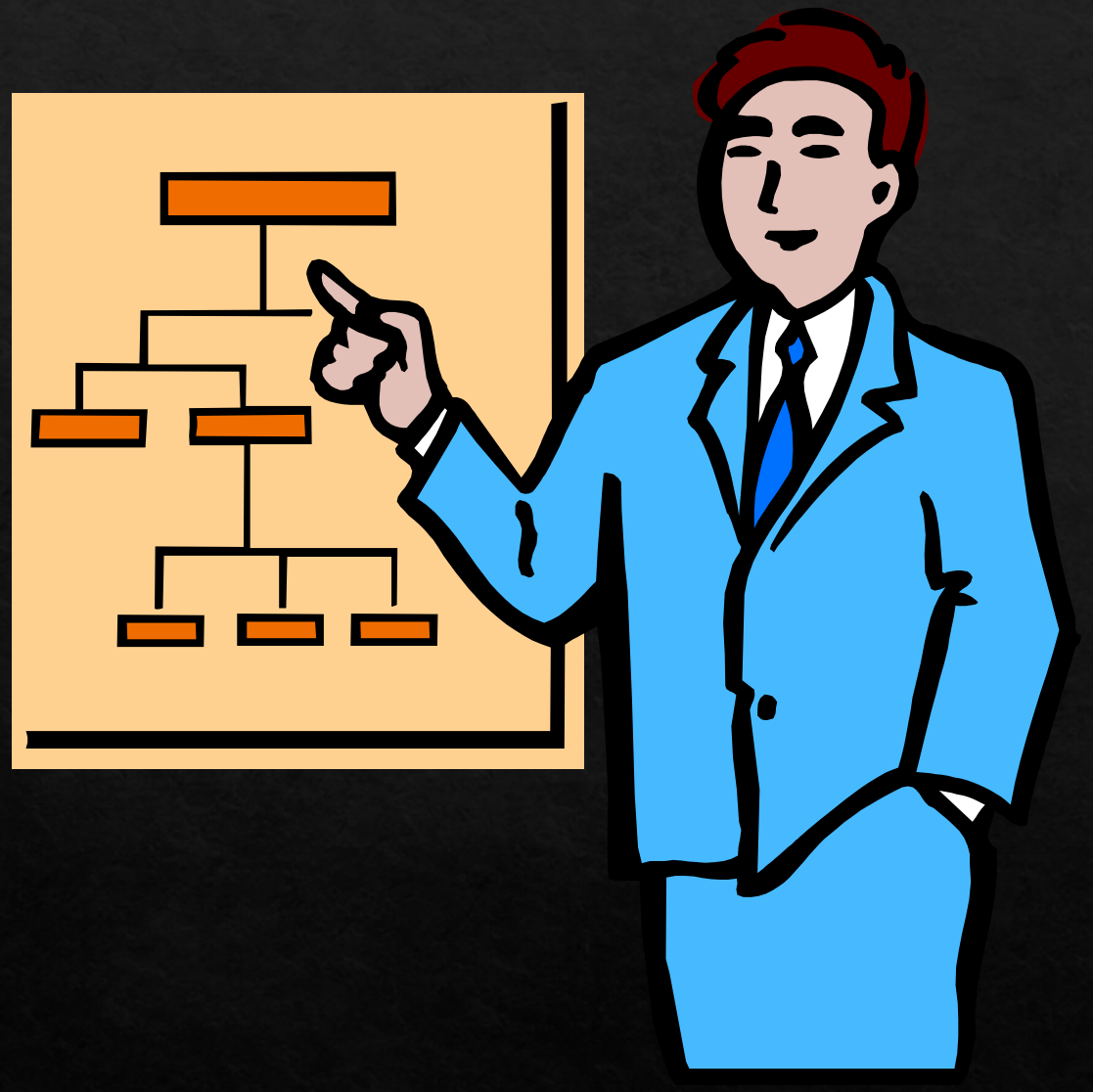
Restate your understanding

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....

Don’t let them beat you up on price!

9. Follow-up

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

10. Start Working Now

Their choice too!

Contextualized Knowledge

Technologically Competent

Reasonably Accessible

Industry Awareness

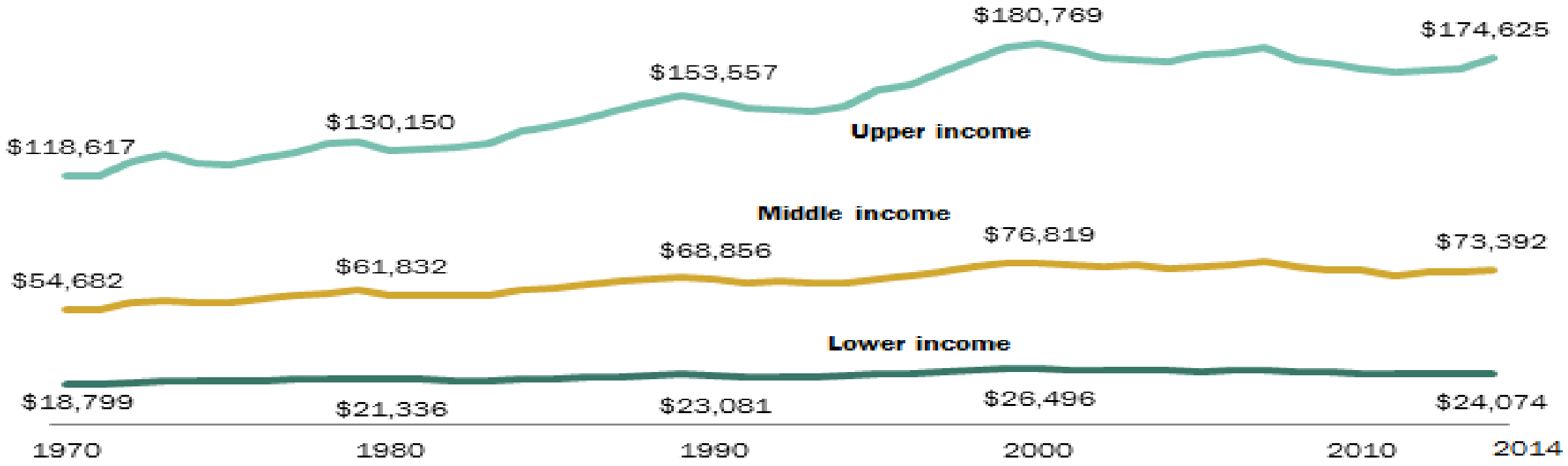
Trust is the Key: Listening is the Way

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

But They Said No???

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

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



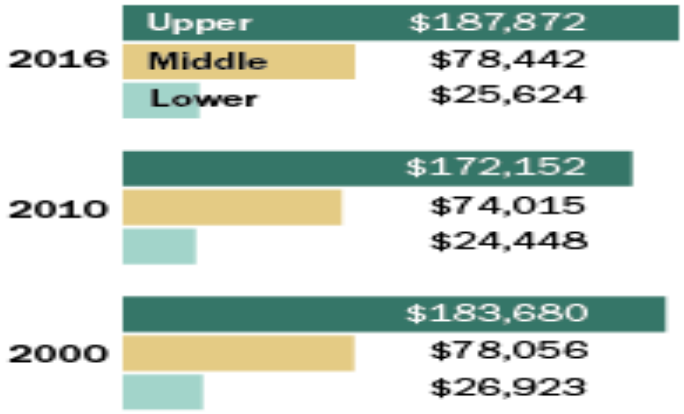
Note: Households are assigned to income tiers based on their size-adjusted income in the calendar year prior to the survey year.

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

PEW RESEARCH CENTER

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

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

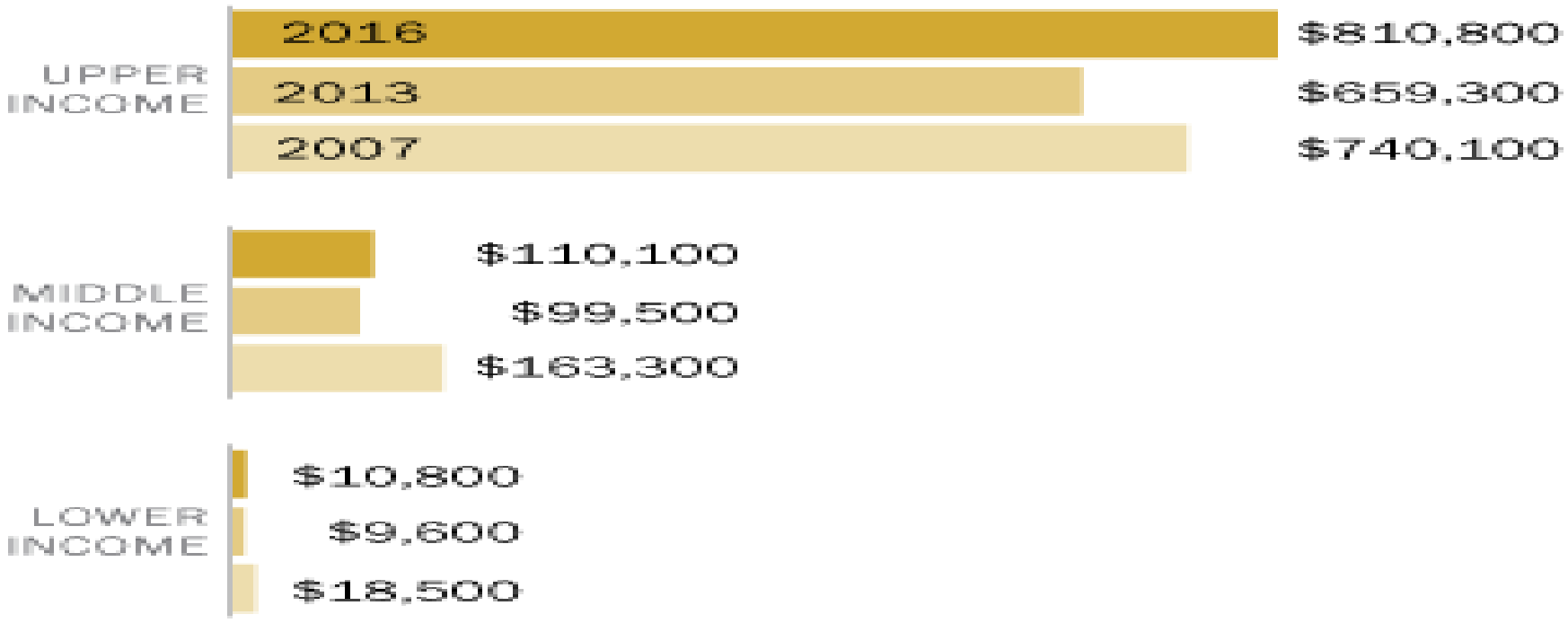


Note: Income data collected in the 2016 American Community Survey pertain to the 2015-16 calendar years. In the 2001 and 2011 Current Population Survey, incomes refer to earnings in the prior calendar year. Incomes are adjusted to 2016 dollars using the CPI-U-RS.
Source: Pew Research Center analysis of 2001 and 2011 Current Population Survey Annual Social and Economic Supplements and 2016 American Community Survey (IPUMS).

PEW RESEARCH CENTER

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

Median household net worth by income, in 2016 dollars



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

PEW RESEARCH CENTER

You may be the problem!

How We Drive Clients Away!

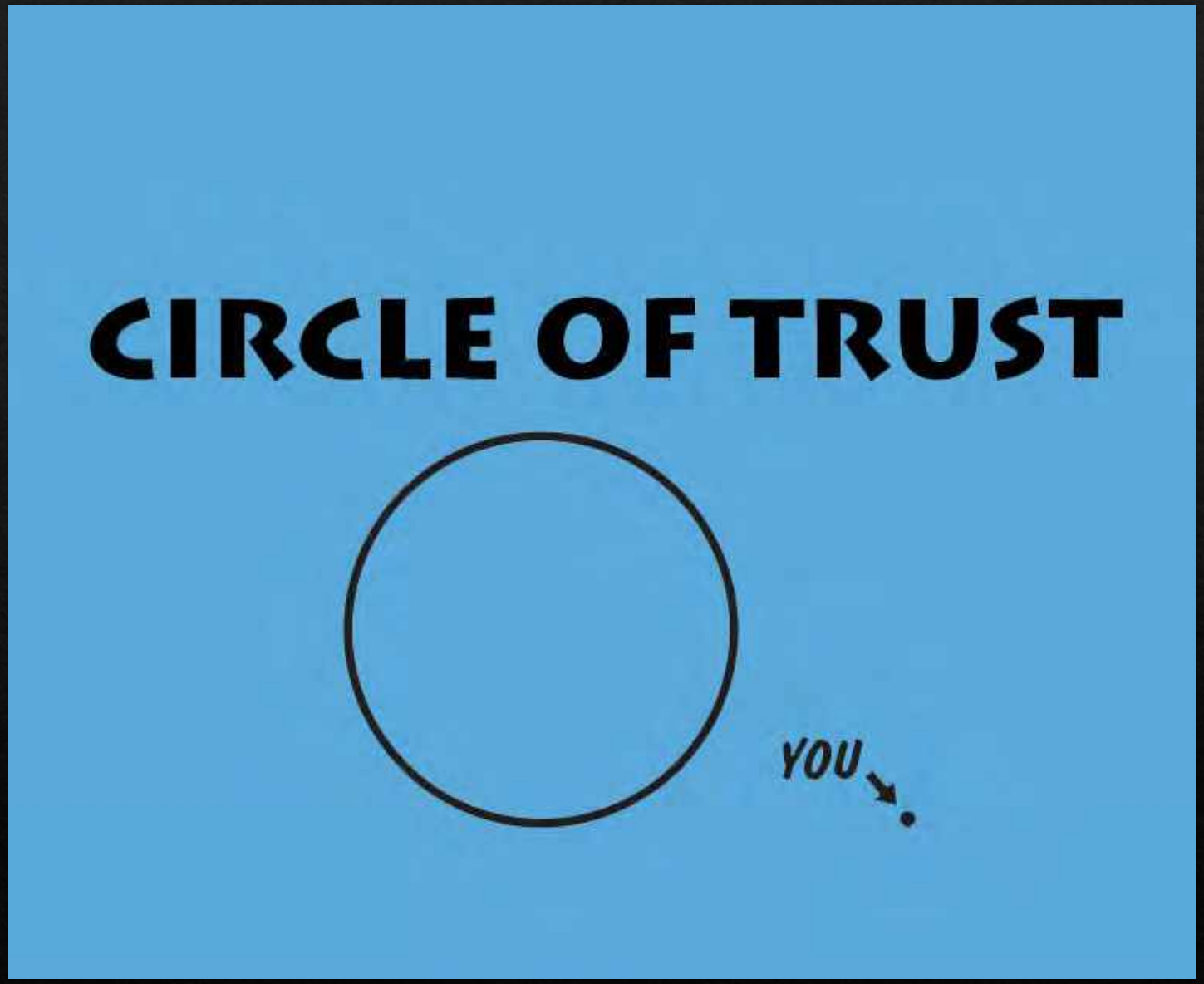
Clio 2019 Legal Trends Report Says:

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

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!



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 77, e-Manual

BUT WAIT!

Who should you avoid?

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

Symptoms of a Problem Client

Managing the Difficult Client

1. Special Time

2. Document, Document, Document LEO 333

3. Set Boundaries- before, during and after

4. Train and Remind

You're Fired!
<u>Rule 1.16(b)</u>

Stop wasting precious time

But you can…

We Can't Control Everything!
Things you can't control or change
Things you can control or change
Being *proactive* means you focus on things you have control over to make things better

Getting Clients to Pay

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

LAW FIRM AV
MARKETING ST

Applicable Rules: 7.1 and 7.5

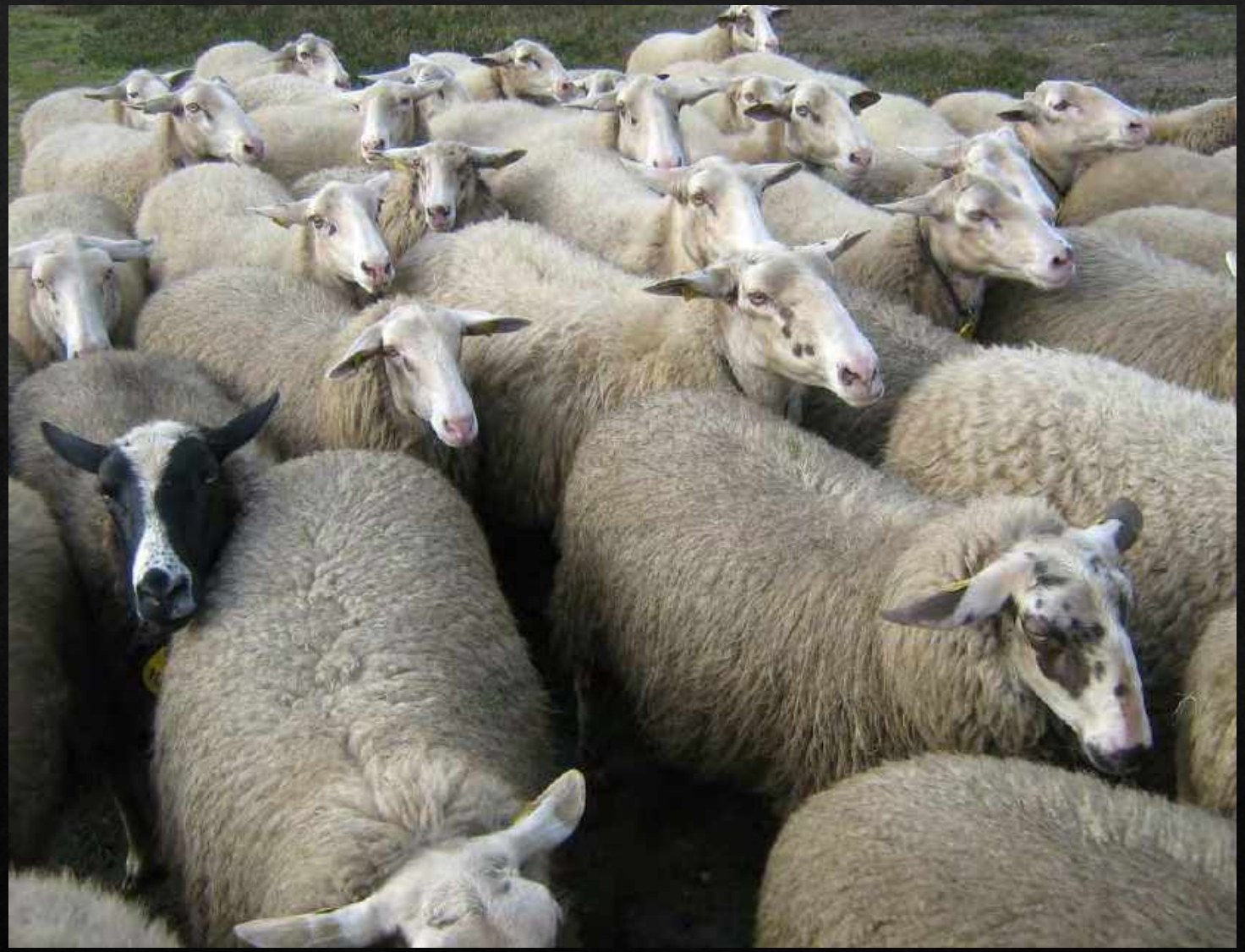
New Ethics Opinions LEO 370 and 371

Codes, regulations & other jurisdictions can also apply.

Example:

Bergman v District of Columbia

DC Court of Appeals 08-CV-859



Marketing

The history.

Herd mentality.

Figuring out what works for you.

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?

THE MESSAGE

Talk about you

Or

The problems you solve

Your Choice

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

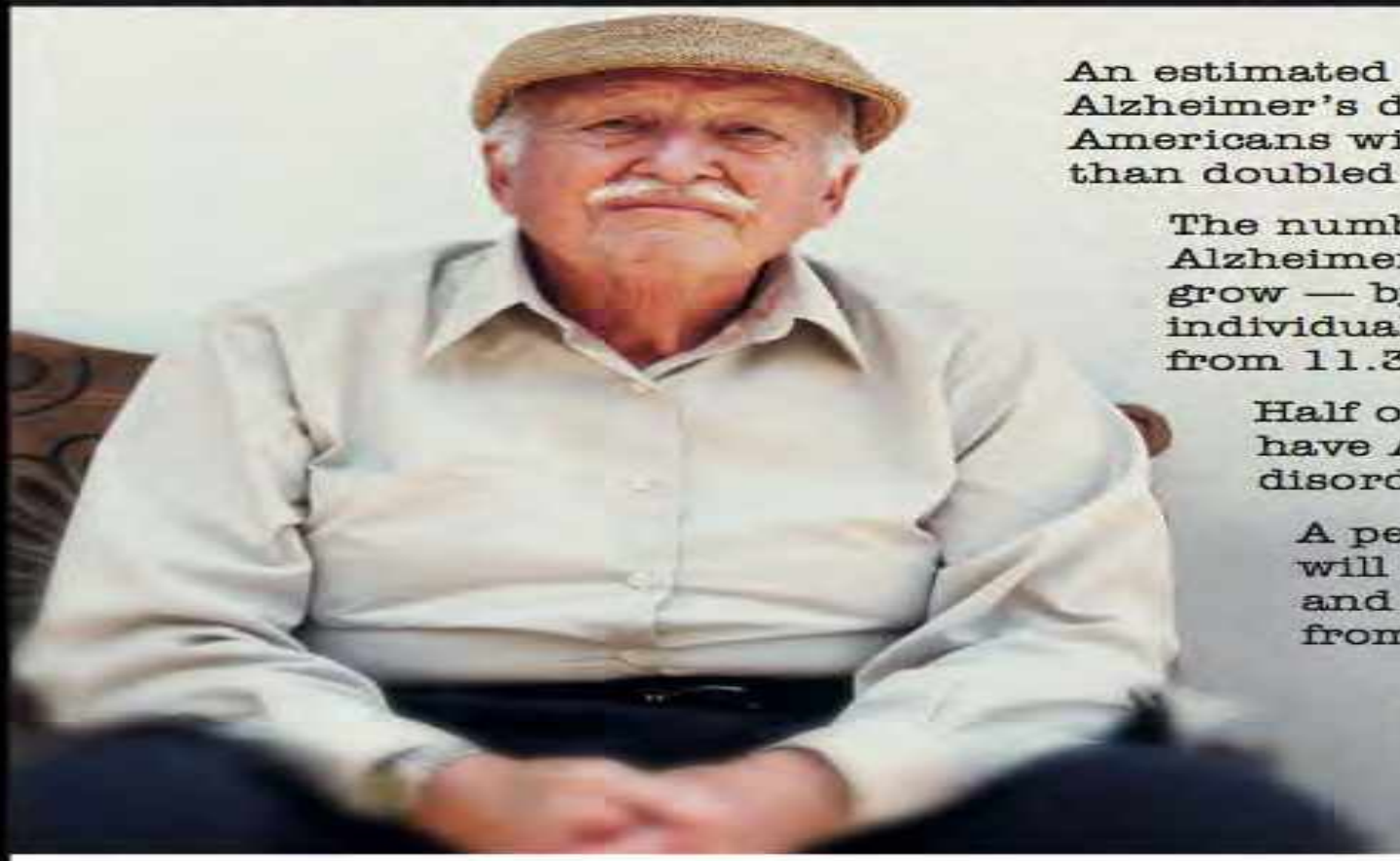
This is Serious
No one thinks their child will end up here
For HELP when the unthinkable happens call
Thomas Wright
Attorney at Law
555-555-1212

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

ROSEN LAW FIRM
NORTH CAROLINA
DIVORCE

Divorce | Finances | Children | Tools | About Us | The Next Step

How do I get a Divorce in North Carolina?

ABSOLUTE DIVORCE

CHILD SUPPORT

CHILD CUSTODY

PROPERTY DIVISION

ALIMONY

DOMESTIC VIOLENCE

MEDIATION

DIVORCE & TAXES

RETIREMENT

ENTREPRENEURS

SPOUSAL SPYING

LAWYER LOCATOR

Get answers at the webinar

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

Free attorney advice

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

https://vimeo.com/168929480

Marketing focused on "me"

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

Attorney and accountant, Notary Public. Former IRS attorney and former tax/business transactions attorney for a major corporation (Freddie Mac®). Education: University of Maryland (B.A., 1977); St. John's University School of Law (J.D., 1980); Georgetown University (M.S. Accounting, 1981); New York University School of Law (LL.M., 1987). Practice serves individuals, business, trusts, estates, partnerships, nonprofit organizations, etc. in regional, national, and international legal matters. Licensed to practice law in Maryland, District of Columbia, Virginia, and New York. Admitted to U.S. District Court-District of Maryland, U.S. District Court-Northern District of New York, U.S. Tax Court, U.S. Court of Appeals-Fourth Circuit, and U.S. Supreme Court Bar.

Computer law, high tech law, biotech law, software/product development agreements, consulting services agreements, software/product licensing agreements, software/product maintenance agreements, domestic and international software/product distribution agreements, e-commerce and web development agreements, joint ventures, teaming agreements, subcontracts, confidentiality agreements, litigation, etc.

Intellectual property (trademarks, service marks, and copyrights), applications, protection issues, infringement issues, domain name and web content protection, online brand protection issues and resolution strategies, domain name recovery and acquisition processes, unfair competition, trade secrets, trade dress claims, litigation, etc. Identifying and inventorying intellectual property assets, buying and selling intellectual property assets, etc.

Trusts, estates, wills, probate, estate planning and administration, general and special powers of attorney, health care power of attorney and advance medical directives/living wills, revocable living trusts, insurance trusts, charitable trusts, special needs

Trust Me, I'm A Lawyer!
(My Dogs Do)
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Meyer
Free Consultation For:
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otorcycle crashes
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Work Injury Attorney
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Prosecutors and Other Reptiles
BEWARE!!!

NEED A GOOD LAWYER
Expungement Special Only $500.00 *plus filing fees
Expungement Special Only $500.00 *plus filing fees
At a price you can afford!
The" Q" Firm Quality
(225) 293-6262
No Evidence
No Conviction!
*Major drug charges
*Serious felonies
*Post conviction relief
*Probation & Parole revocations
*Expungements *Bond reductions
*All Federal & State Courts
This is an advertisement

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

The Magic Lawyer™

Robert SPEER

770.517.0017

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

Your legal case is no place for on the job training.
THE NATIONAL TOP 100 TRIAL LAWYERS
TRIAL LAWYERS
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?

Marketing Opportunities

- You & your presence
- Your office
- Business card
- Website (video)
- Newsletter

01

Blog

02

Brochure

03

Social media

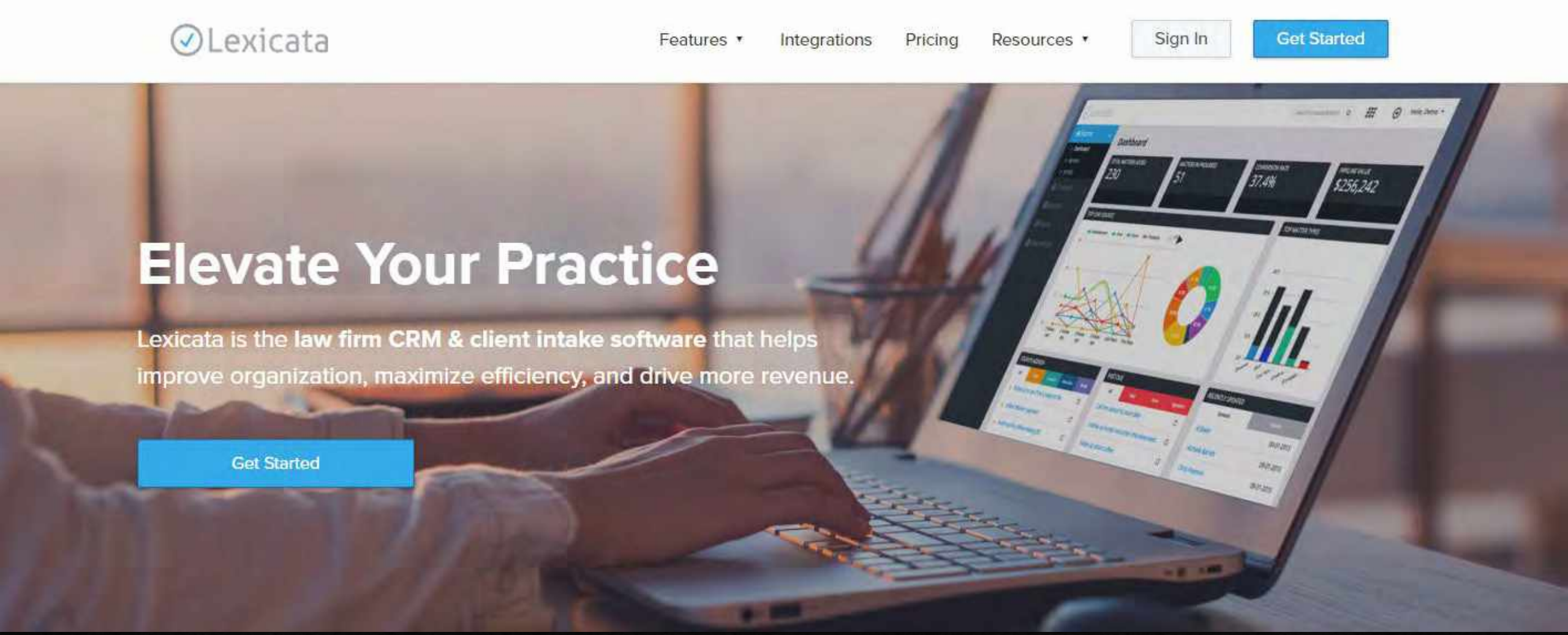
04

Speaking engagements

05

Books/ free publications

More Marketing Opportunities



Now merged - Clio Grow

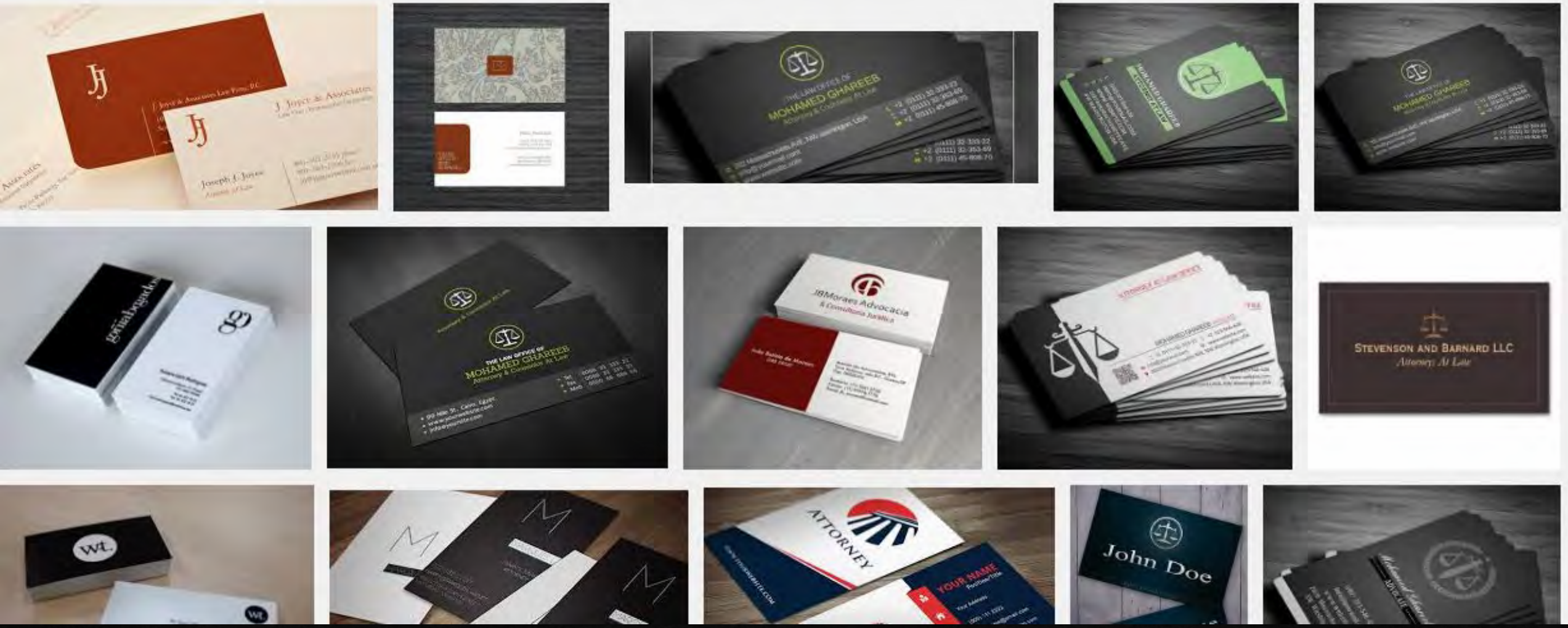
Don’t get Comfortable!

- 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

WiX
.com

weebly

WordPress

DirectLaw®
Virtual Lawyering Made Simple™

duda mobile

Must have website

- You can do the work yourself:
  - http://rollinsandchan.com/
  - www.weebley.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

Marketing: Website

- 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

the seo process
Research
Research main keywords using various tools, analytics, and competitor analysis
Structure
Develop structure for keywords on each page.
On-Site SEO
Optimize each page for main keywords.
Link Building
Build links to homepage & main pages.
Keep Improving
Search engines take time to update links and keywords.
Analyze Rankings and Traffic
As search engines update and traffic increases, look into rankings and traffic to analyze results.

Marketing: Mobile Website

Mobile website? www.dudamobile.com

Thumb-friendly design;

Create for visibility & simplicity;

Click-to-dial phone number;

No more than 7 main navigation buttons

Before

After

Marketing

- Don't be clever . . .
- But invisible, like . . .
- www.sankel.com

Marketing: Internet

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

Home Explore Pricing FAQ Blog Contact Admin Login

The app your clients have been asking for.

Yourfirmapp.com

Newsletter

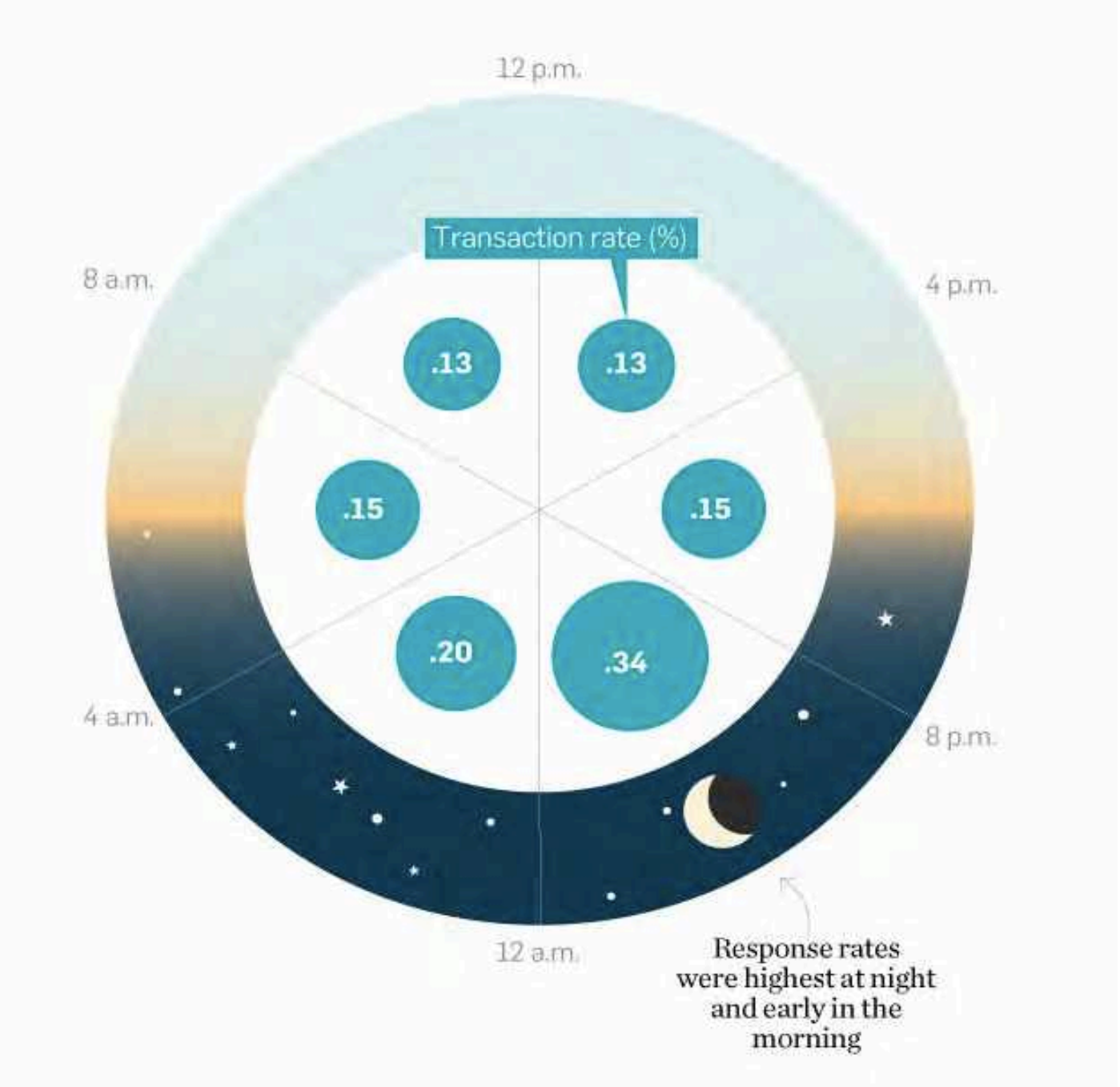
1. Talk about ideal clients problem

2. Directed to the potential client

3. Your solution reaches the problem

Newsletter-Timing

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



MailChimp

emma

facebook

LinkedIn™

buffer

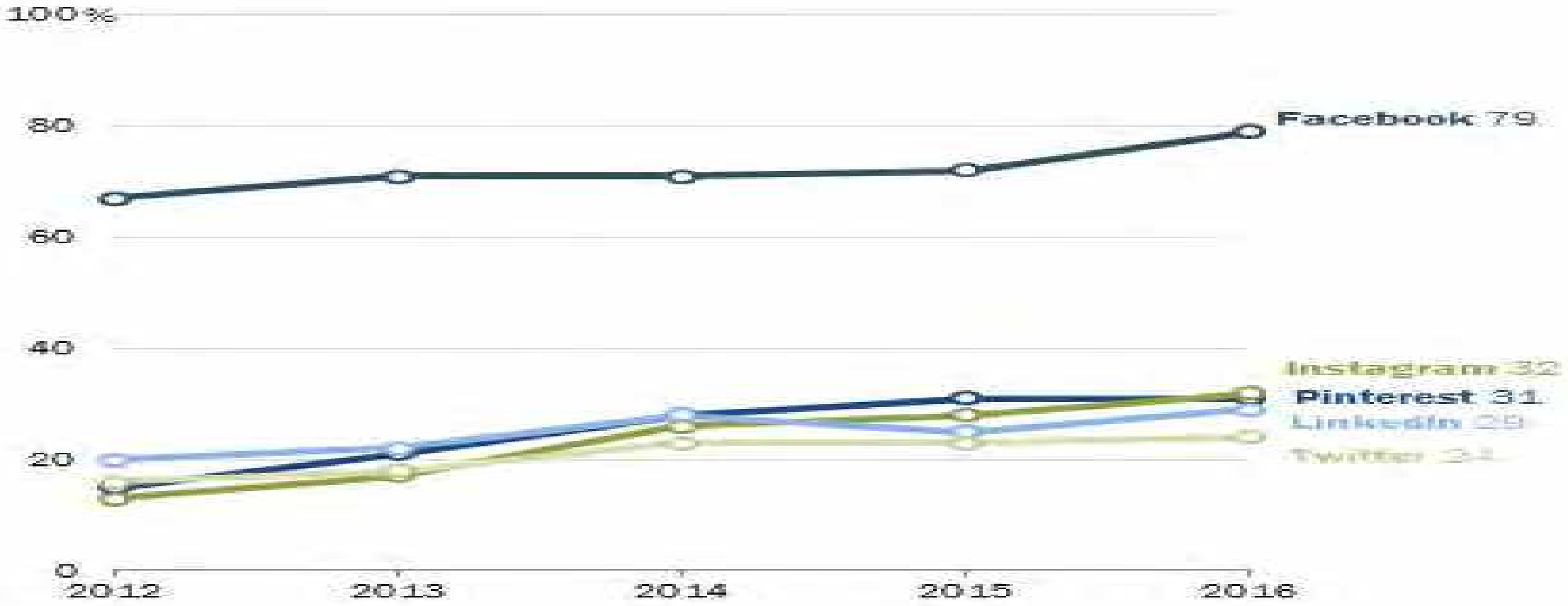
Hootsuite™

Marketing Tools

Customer Relationship Management Software

Facebook remains the most popular social media platform

% of online adults who use ...



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

PEW RESEARCH CENTER

Worst Lawyer Video

Lawyers and Video: Thoughts?

Video Marketing

www.pixability.com

www.fairfaxvideostudio.com

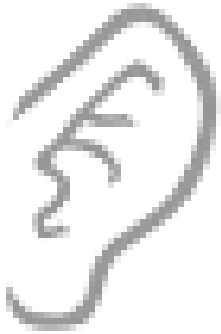
www.oginski-law.com

www.crispvideo.com

Lawyer Video Examples

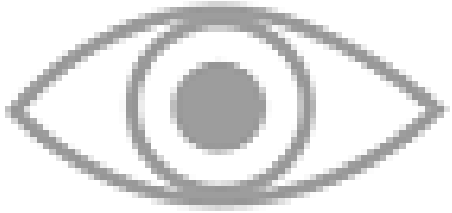
- How to apply for a work visa: http://www.youtube.com/watch?v=sUWG2MJWJ0A&feature=fvsr
- How do I file bankruptcy: http://www.youtube.com/watch?v=_aHAycjv_MM
- How to file a legal separation: http://www.youtube.com/watch?v=oi-y9s4OhEo

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

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

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

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

A FEW FINAL WORDS

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

One Practice Area

High quality work product

Be the expert

To Make It Work

Build Your Network

DC BAR

PRACTICE 360° A DAY FOR LAWYERS & LAW FIRMS

Presented by the Award-Winning D.C. Bar
Practice Management Advisory Service

Friday, May 15, 2020 | 8:30 a.m.–5 p.m.
D.C. Bar | 901 4th Street NW

FEATURED SPEAKERS

Ada Chan
Rollins and Chan Law Firm

Seth Price
Price Benowitz, LLP

Nakia Gray
Nakia Gray Legal, P.C.

Jack Newton
Clio

REGISTRATION OPENS MARCH 16

Stay tuned for more details!

LAW FIRM INNOVATION ■ ETHICS ■ WELLNESS ■ MARKETING

Join us and revolutionize the way you manage your law firm.

Network

Build a system for engaging

Create and Feed your network

Follow up

Be Bold....

Networking Opportunities

Friday, February 28, Noon Barrel & Crow, 4867 Cordell Ave., Bethesda, MD (Bethesda Metro) RSVP to rsjillions@gmail.com

- Friday, March 13, 12:30 p.m. Alto Fumo, 2909 Wilson Boulevard, Arlington, VA (Clarendon Metro) 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