

2018 NATIONAL CLE CONFERENCE

LAW PRACTICE MANAGEMENT TRACK

HOW TO
MANAGE
A SMALL
LAW FIRM

HAPPY LAWYERS MAKE MORE MONEY

PRODUCTIVITY



SESSION 1

MAKING YOUR LAW FIRM BUSINESS WORK FOR YOU

.....
Understanding Why Happy Lawyers Really DO Make More Money



CHRISTOPHER T. ANDERSON

Entrepreneurial attorney with a passion for helping lawyers define and achieve success:



- ⚙️ FINANCIALLY
- ⚙️ PERSONALLY
- ⚙️ PROFESSIONAL

and realize their dreams by building law firm businesses that work for them, and those who rely on them.

 @LAWFIRMBUSINESS

 LAWFIRMBUSINESS

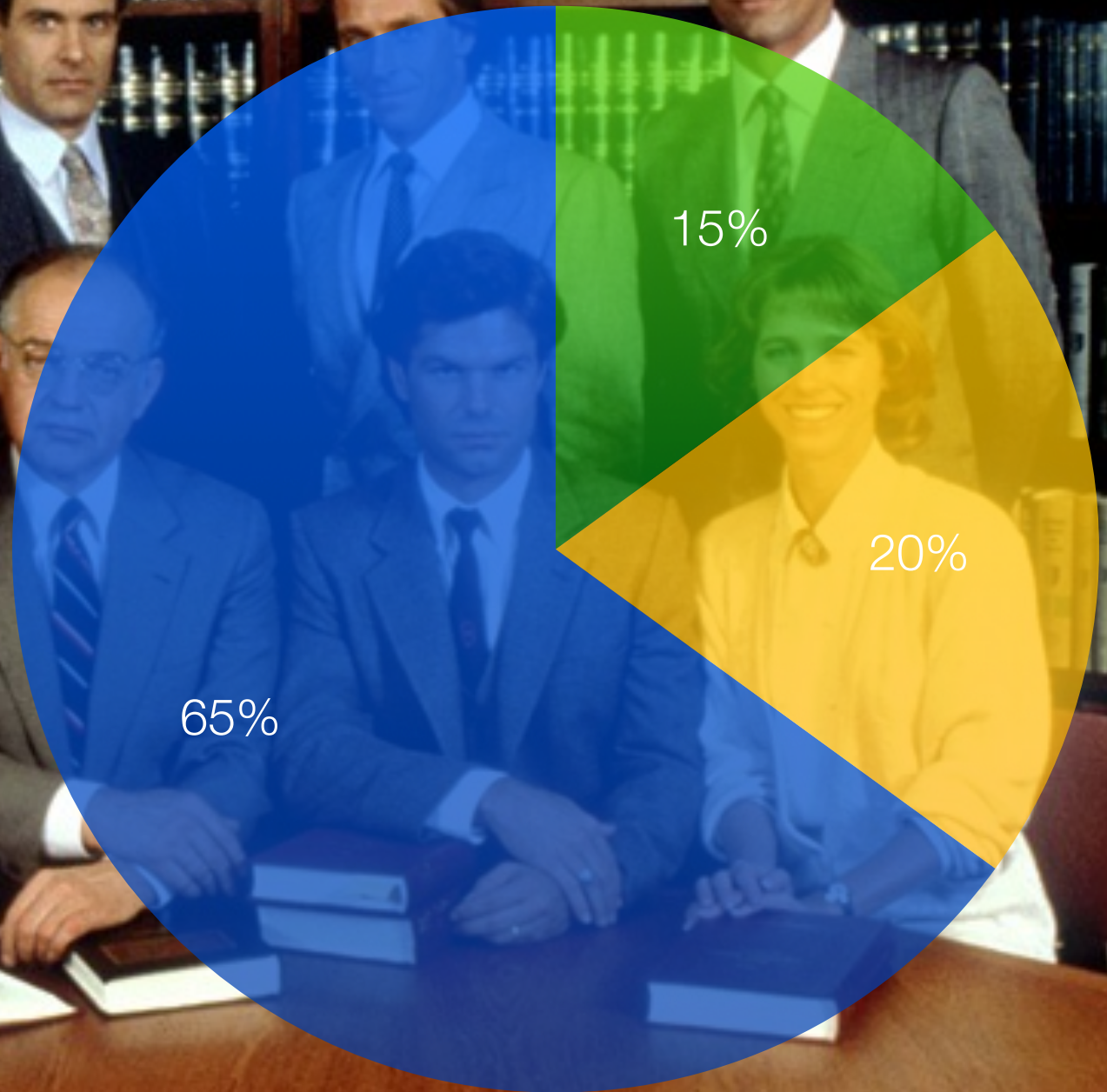


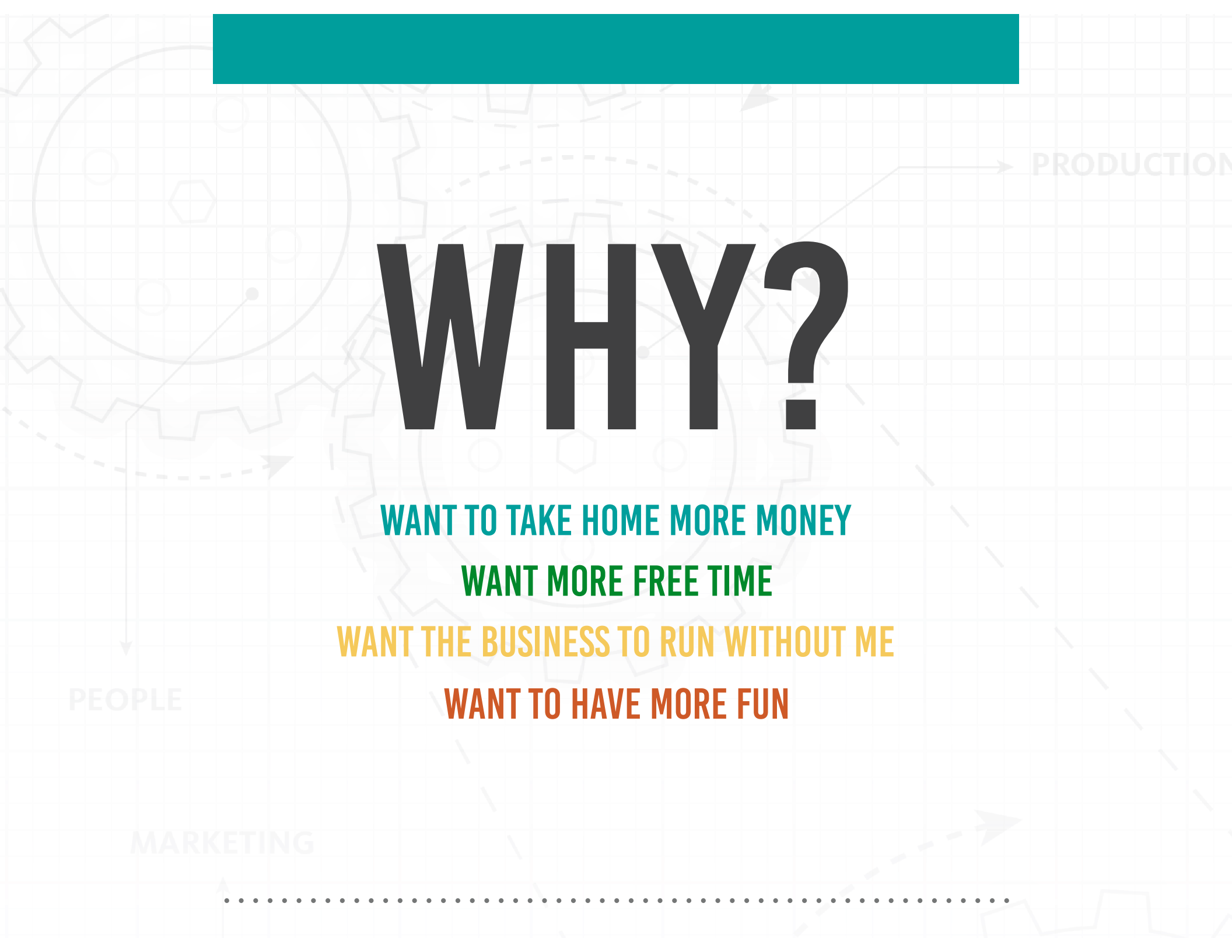


WHY?



The Dream





WHY?

WANT TO TAKE HOME MORE MONEY

WANT MORE FREE TIME

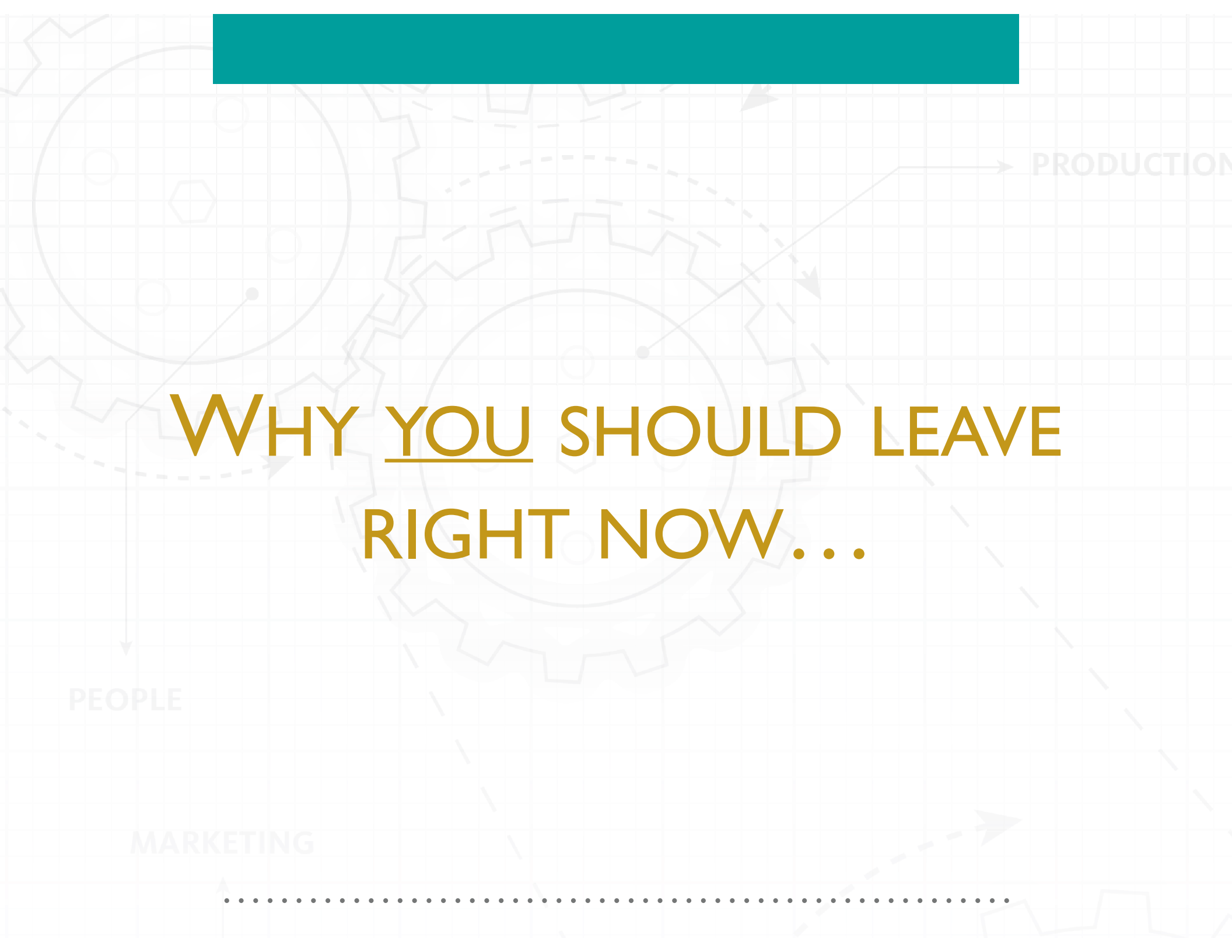
WANT THE BUSINESS TO RUN WITHOUT ME

WANT TO HAVE MORE FUN

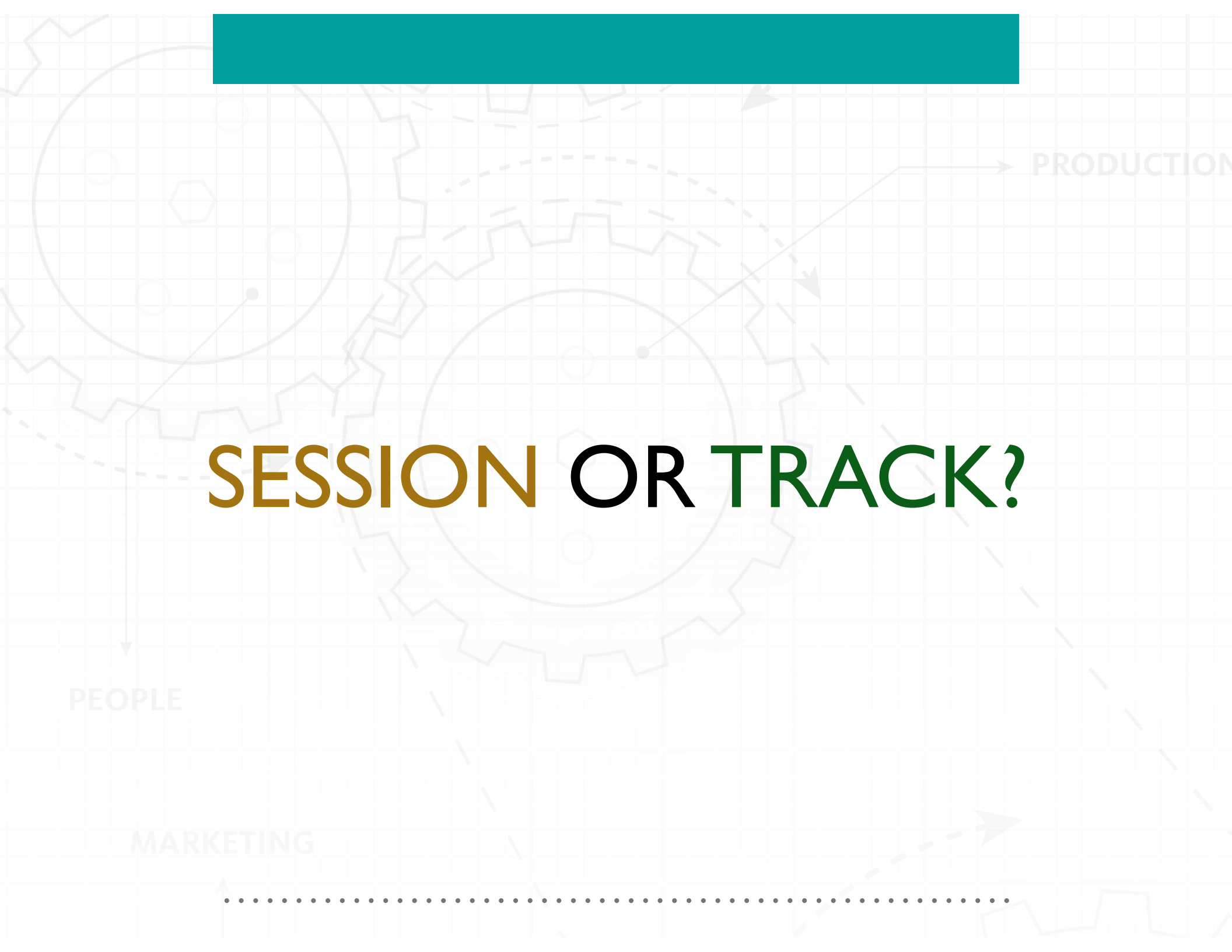
WHY?



MARKETING

The background features a light gray grid with faint, stylized gear illustrations. Three business terms are scattered around: 'PRODUCTION' in the top right, 'PEOPLE' in the bottom left, and 'MARKETING' in the bottom left. A dashed line with arrows forms a circular path around the central text. A solid teal bar is at the top, and a dotted line is at the bottom.

WHY YOU SHOULD LEAVE RIGHT NOW...

The background features a light gray grid with faint, stylized illustrations of interlocking gears and dashed arrows indicating a clockwise flow. The words 'PEOPLE', 'MARKETING', and 'PRODUCTION' are faintly visible in the background, corresponding to the arrows.

SESSION OR TRACK?



EVERYTHING YOU NEED TO KNOW

2 QUESTIONS

WHAT IS GOING
TO START YOU?

WHAT IS GOING
TO STOP YOU?

PEOPLE

MARKETING



**WHAT WOULD
YOU ADVISE?**

The background features a light gray grid with faint, stylized diagrams. These include a large gear on the left, a dashed circular arrow in the center, and a solid arrow pointing right towards the word 'PRODUCTION' on the right. On the left, the word 'PEOPLE' is written vertically, and at the bottom left, 'MARKETING' is written. A dotted line with an upward-pointing arrow is at the bottom.

DO YOU HAVE A BUSINESS PLAN?



“The Cobbler’s children go unshod”



WHAT IS THE BUSINESS OF A LAW FIRM?



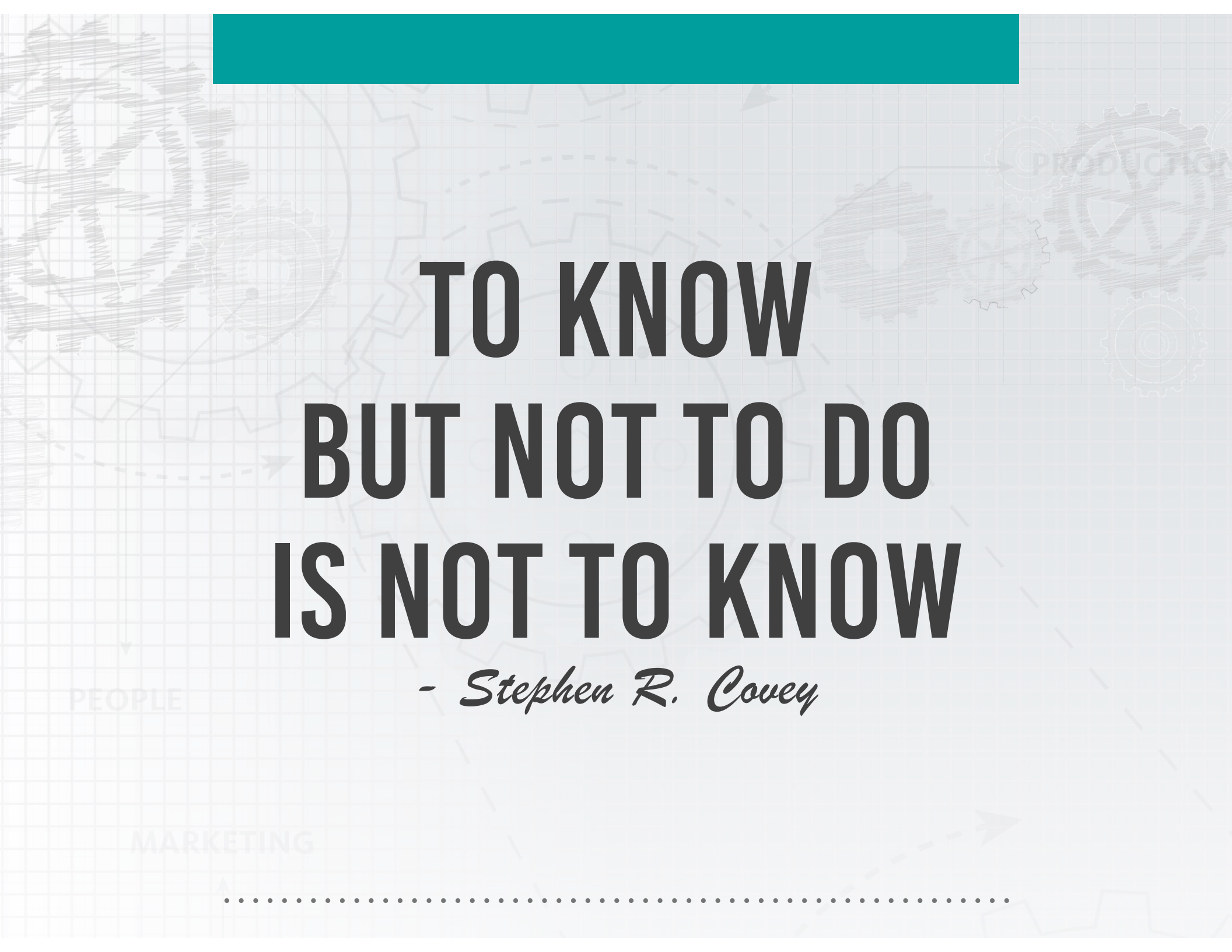
WHAT IS THE PURPOSE OF YOUR BUSINESS?

THE PURPOSE OF YOUR BUSINESS

NOT TO: PAY TAXES
PAY TAXES
PROVIDE JOBS
SUPPORT THE COMMUNITY
IMPROVE CLIENTS' LIVES
IMPROVE EMPLOYEES' LIVES

TO: SATISFY THE NEEDS OF THE OWNER
FUND HER IDEAL LIFESTYLE
GIVE HER THE ABILITY TO LIVE THE
WAY SHE WANTS TO LIVE
TO ACHIEVE HER PROFESSIONAL
GOALS

OTHERWISE WHY WOULD WE DO THIS?!?



**TO KNOW
BUT NOT TO DO
IS NOT TO KNOW**

- Stephen R. Covey

.....

WHAT IS A LAW FIRM BUSINESS PLAN?

- 1** **MARKETING**
Is your marketing getting you the **RIGHT** kinds of **prospective clients** to contact and keeping the **WRONG** type of clients away?
- 2** **SALES**
Sales is not a 4 letter word. When done correctly, its' something you do **FOR your prospective clients, not TO them.** Make sure you're selling legal services the right way.
- 3** **FACTORY**
Your firm's "factory" produces work-product, efficiently, professionally and reliably. **This way you don't become a slave to your success.**
- 4** **PEOPLE**
Did you know that there are more than 12 different Roles in every successful law firm? Many of the hats you wear actually reduce the profitability of your firm. **Are you wearing the right ones?**
- 5** **PHYSICAL PLANT**
Make sure your physical office space, equipment, policies & procedures meets the needs of your ideal clients and your team! **Don't throttle your growth** with poor planning.
- 6** **METRICS AND MONEY**
As a business owner you need to **understand how to analyze, interpret, make sense of** your numbers so you can **MAKE MORE CONFIDENT DECISIONS** about YOUR business.
- 7** **YOU**
You are the "wild card" in your business. **Do you believe** your firm can be successful and profitable and give you more time for the things you love? The answer to that question will dictate your **RESULTS.**

PEOPLE

MARKETING

**HOW TO
MANAGE
WHAT DO WE DO?
A SIMPLE
LAW FIRM**

HAPPY LAWYERS MAKE MORE MONEY

MARKETING

.....

WHAT IS

HOW TO
MANAGE
A SMALL
LAW FIRM?

HAPPY LAWYERS MAKE MORE MONEY

PRODUCTION

LIVE QUARTERLY MEETINGS



OUR TEAM



Rjon Robins
Owner



Alejandra Leibovich
Owner



Christopher Anderson
General Counsel



Rick Gramatges
Senior Director of OPS



Kristen David
Law Firm Management



Brian Matter
Law Firm Management



Kevin Schulz
Law Firm Management



Renee Robertson
CLE Tour Manager



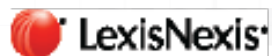
Henry Harlow
Law Firm Management



Terrence Fogarty
Law Firm Management



THANK YOU TO THESE SPONSORS OF OUR CLE TOUR AND EVENTS



HOW TO MANAGE A SMALL LAW FIRM IS ONE OF THE FASTEST GROWING COMPANIES IN AMERICA!!
OUR MEMBERS KICKED SO MUCH BUTT,
WE MADE THE INC 5000 LIST!

7 Parts of Your Business

YOU

Money &
Metrics

Marketing

Sales

Physical
Plant

Factory

People

PRODUCTION

PEOPLE

MARKETING

.....

EXERCISE: I CAN EXPLAIN TO MY STAKEHOLDERS HOW EACH OF THE 7 PARTS OF MY BUSINESS ARE SUPPOSED TO WORK



CIRCLE ONE

SCORE

MARKETING	0	1	2	3	
SALES	0	1	2	3	
FACTORY	0	1	2	3	
PEOPLE	0	1	2	3	
PHYSICAL PLANT	0	1	2	3	
MONEY & METRICS	0	1	2	3	
YOU	0	1	2	3	

TOTAL:

KEY

0 - NEVER REALLY THOUGHT ABOUT IT BEFORE

1 - I COULD EXPLAIN BUT IT WOULD HAVE TO BE VERBAL BECAUSE IT'S NOT IN WRITING.

2 - I COULD SHOW THEM SOMETHING IN WRITING BUT IT'S MORE THAN 24 MONTHS OUT OF DATE.

3 - I HAVE THIS PART OF MY BUSINESS PLAN IN WRITING AND RELEVANT TO HOW MY BUSINESS CURRENTLY OPERATES.

MARKETING

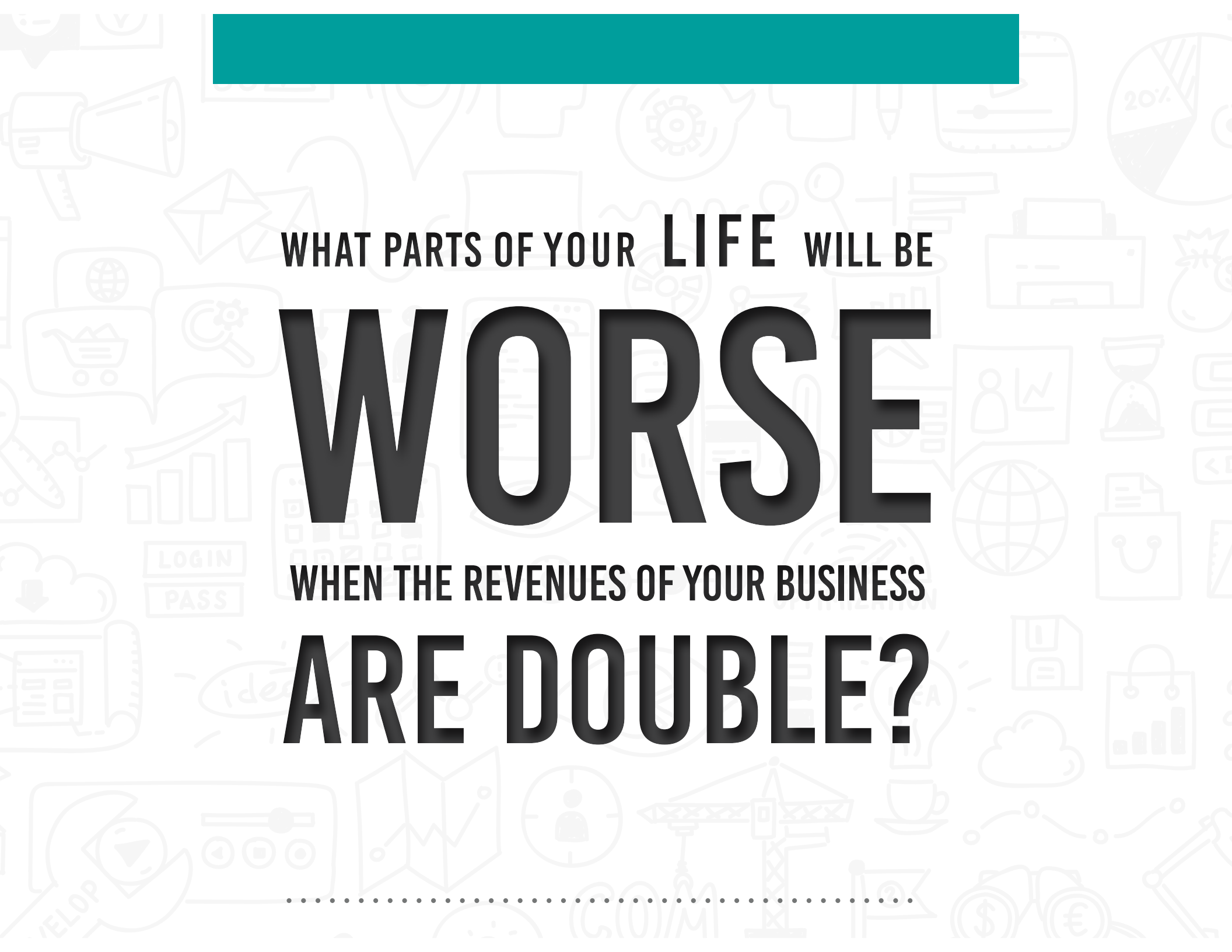
.....

“SEEING” YOUR BUSINESS

PEOPLE

MARKETING

	MARKETING	SALES	FACTORY	PEOPLE	PHYSICAL PLANT	MONEY & METRICS	YOU
INTERNAL POLICIES							
EXTERNAL POLICIES							
PROCEDURES							
CHECK LISTS							
TEMPLATES							
EXAMPLES							
SYSTEMS							



WHAT PARTS OF YOUR **LIFE** WILL BE

WORSE

WHEN THE REVENUES OF YOUR BUSINESS

ARE DOUBLE?

SESSION 2

THE 4 STAGES OF LAW FIRM GROWTH

.....

Where are you? Where do you really want to be?



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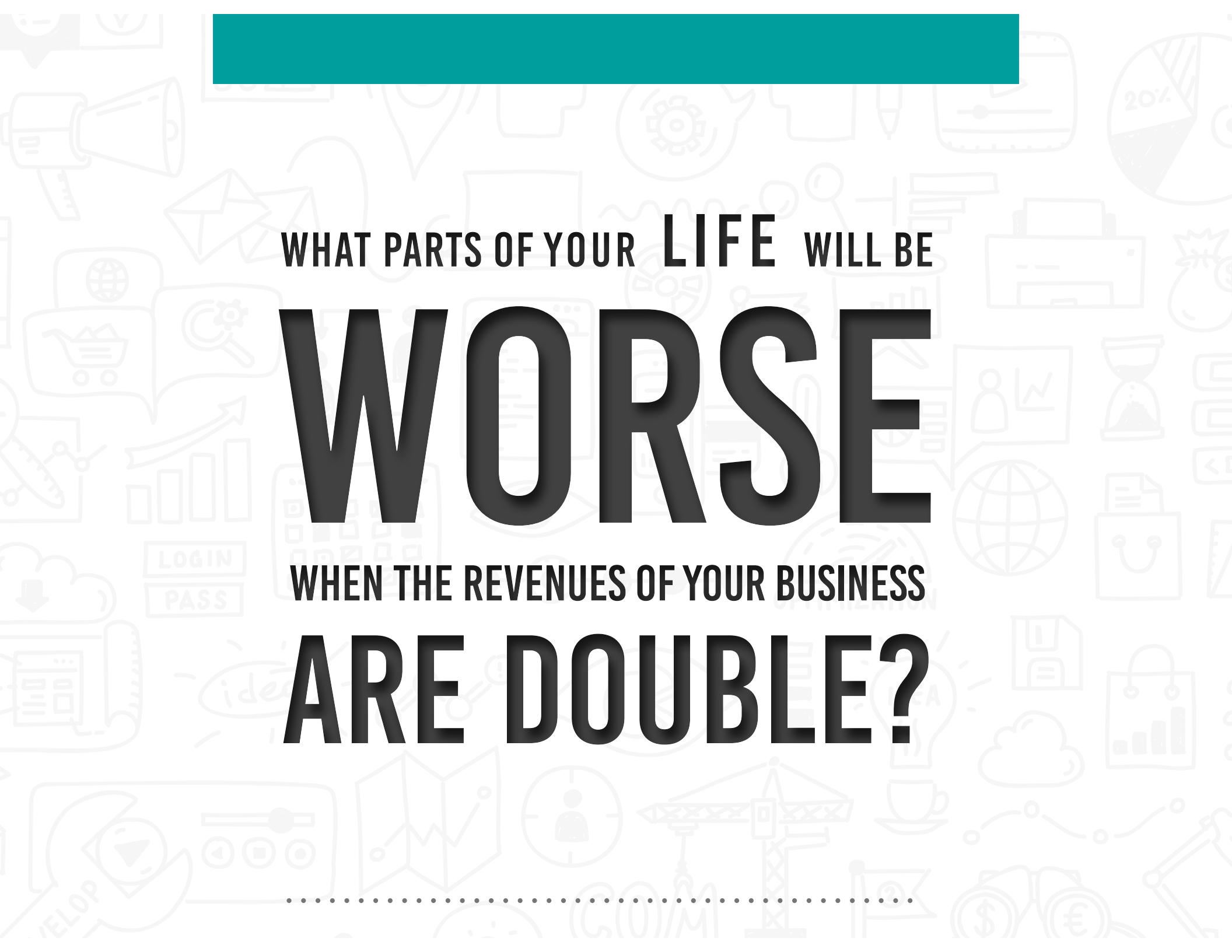
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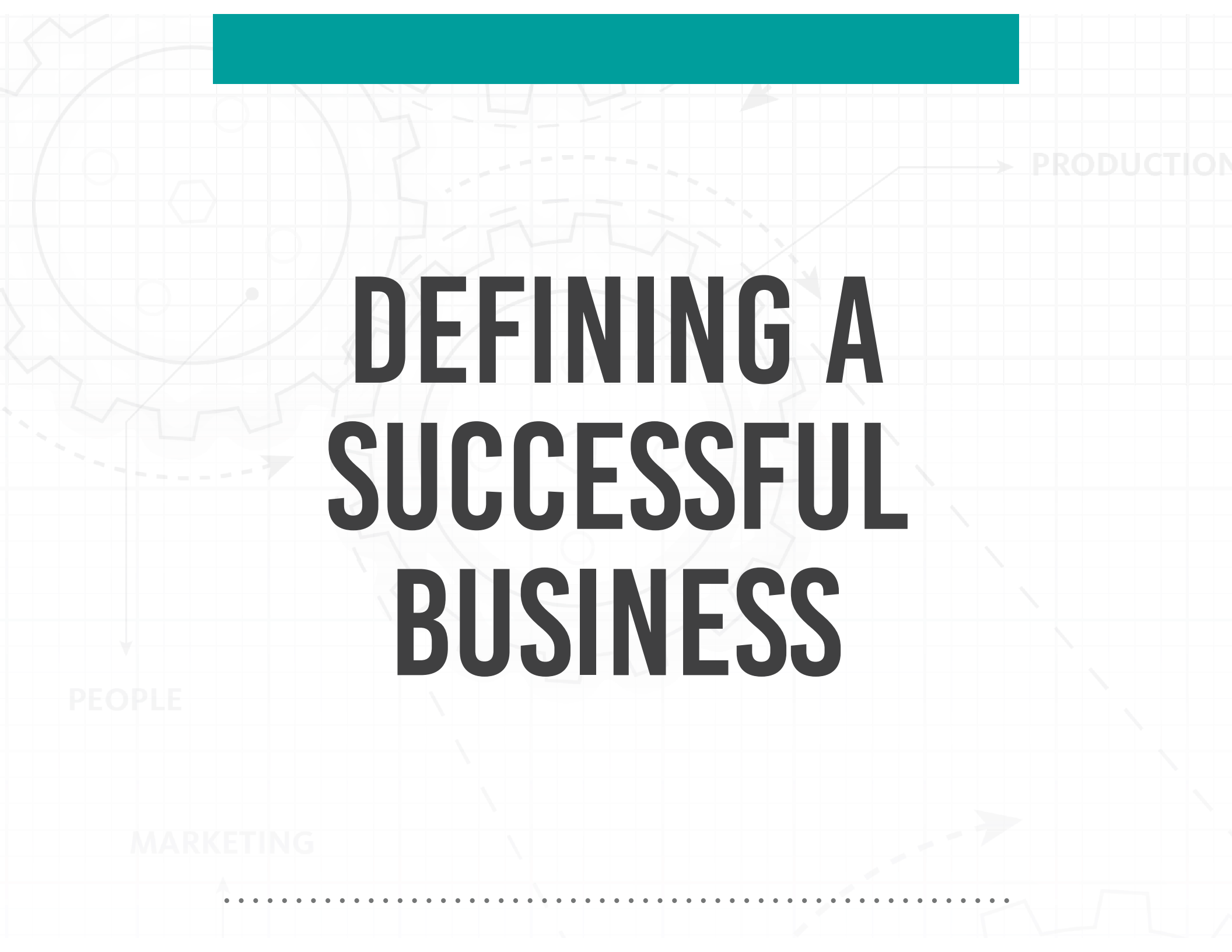


THE 6 STAGES

OF A SUCCESSFUL LAW FIRM



HOW TO
MANAGE
A SMALL
LAW FIRM

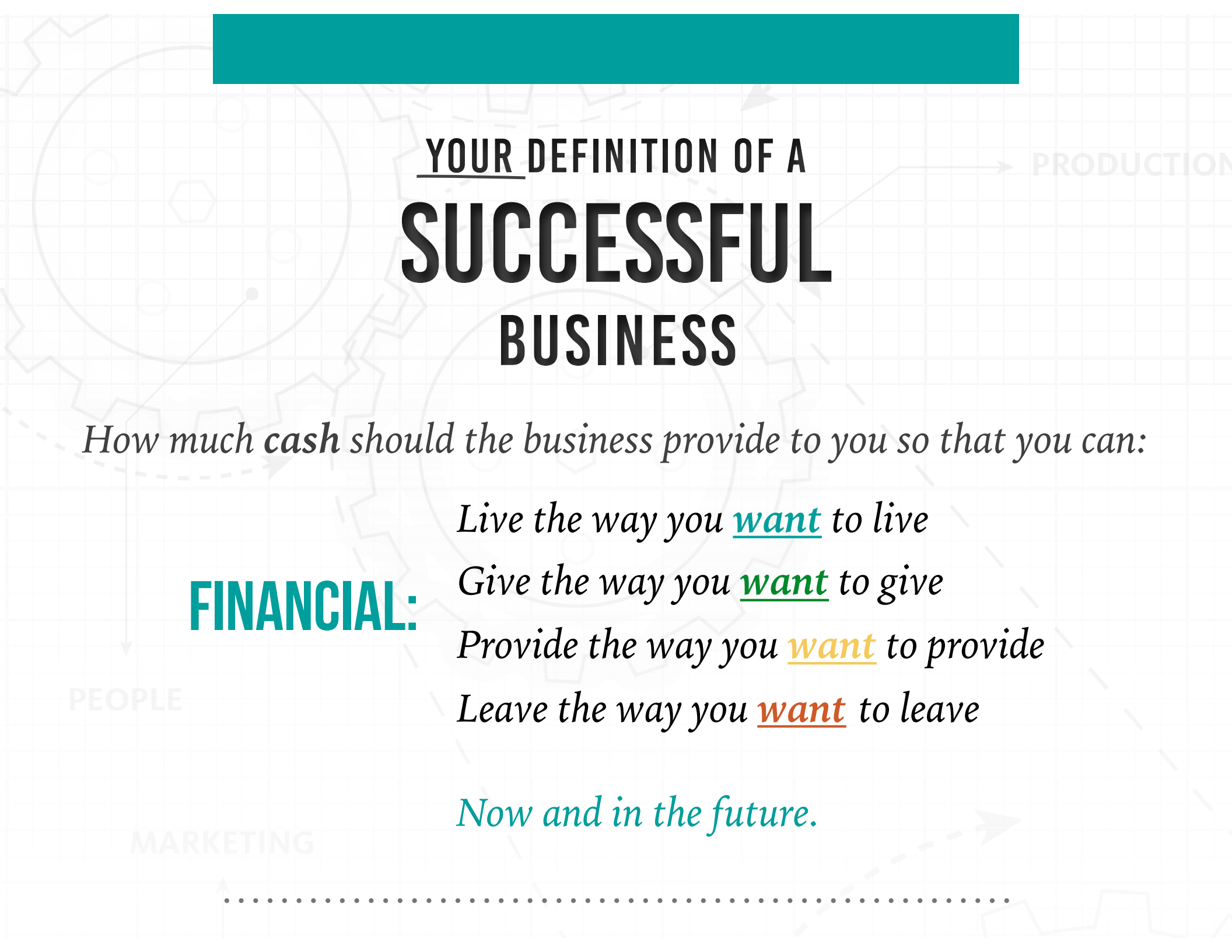


DEFINING A SUCCESSFUL BUSINESS



OUR DEFINITION OF A **SUCCESSFUL** BUSINESS

- ⚙ *financial*
 - ⚙ *personal*
 - ⚙ *professional*
 - ⚙ *(fun)*
- 



YOUR DEFINITION OF A SUCCESSFUL BUSINESS

*How much **cash** should the business provide to you so that you can:*

FINANCIAL:

Live the way you want to live

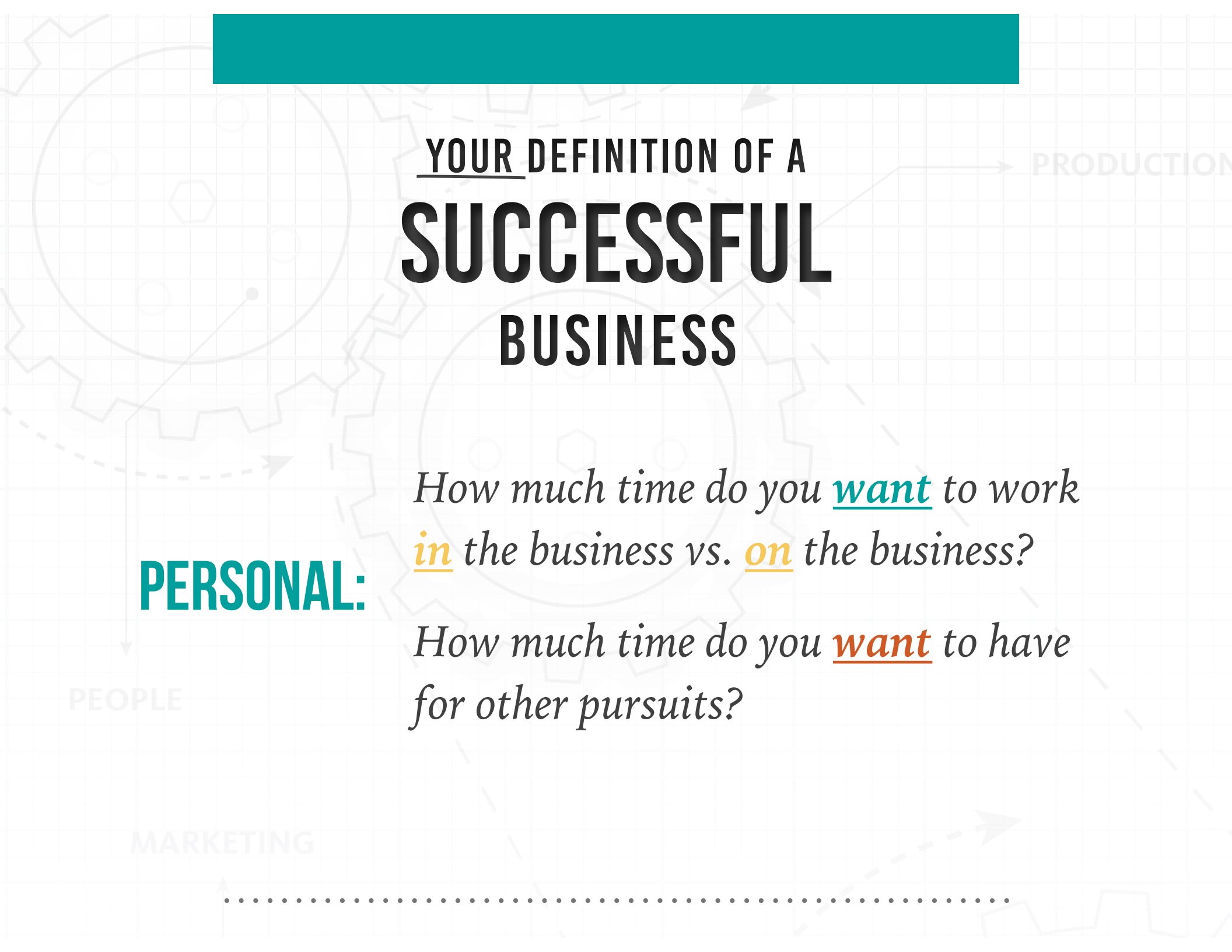
Give the way you want to give

Provide the way you want to provide

Leave the way you want to leave

Now and in the future.

.....



YOUR DEFINITION OF A SUCCESSFUL BUSINESS

PERSONAL:

*How much time do you want to work
in the business vs. on the business?*

*How much time do you want to have
for other pursuits?*

.....



YOUR DEFINITION OF A SUCCESSFUL BUSINESS

PROFESSIONAL:

*What should the business be/do
that makes you proud? How can
it be an expression of your values?*

FIRST 4 STAGES OF LAW FIRM GROWTH

CREATING A
SUCCESSFUL PRACTICE

STAGE 1

\$0 - \$250,000

CHALLENGES:

- TOO MUCH TIME WITH WRONG CLIENTS
- HAVE TO DO ALL THE WORK
- DON'T BELIEVE GROWTH IS POSSIBLE

OPPORTUNITIES:

- LEARN TO EFFECTIVELY SELL LEGAL SERVICES
- GAIN CLARITY & FOCUS ON BUSINESS MODEL

UPGRADING YOUR PRACTICE
TO A SUSTAINABLE BUSINESS

STAGE 2

\$250,000 - \$500,000

CHALLENGES:

- UNWILLING TO GIVE UP THE "DOING"
- AD-HOC SYSTEMS ARE OUTGROWN
- BUILD & LEAD YOUR "A-TEAM"

OPPORTUNITIES:

- SYSTEMS BEGIN FORMING
- MORE TIME OFF
- REVENUES BECOME MORE RELIABLE & PREDICTABLE

GROWING YOUR BUSINESS
TO BREAK 7 FIGURES

STAGE 3

\$500,000 - \$1MM

CHALLENGES:

- FINANCES NOW WARRANT CONTROLS
- FEEDING THE FACTORY
- OUTGROWING PHYSICAL PLANT

OPPORTUNITIES:

- MAXIMIZE PROFIT
- OPPORTUNITY TO SCALE
- CAN STEP AWAY FROM FIRM EASILY

BECOMING A CEO: PROFITING
FROM YOUR PURPOSE

STAGE 4

\$1MM ++

CHALLENGES:

- LONELINESS
- BOREDOM
- STAKES ARE HIGHER

OPPORTUNITIES:

- CHANGE THE WORLD
- DISCOVER YOUR REAL POTENTIAL
- CONTROL YOUR TIME
- MORE FUN!!

4 STAGES

CREATING A SUCCESSFUL PRACTICE

STAGE 1

\$0 - \$250,000

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UPGRADING TO A SUSTAINABLE

STAGE 2

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CHALLENGES:

- UNWILLING TO LET GO OF THE "A-TEAM"
- AD-HOC DECISIONS
- BUILDING A TEAM

OPPORTUNITIES:

- SYSTEMATIZING THE FIRM
- MORE CLARITY & FOCUS
- REVEALING MORE POTENTIAL

GROWTH

BUSINESS RESOURCES

STAGE 3

\$500,000 - \$1MM

CHALLENGES:

- LACK OF TOOLS
- LACK OF STORY
- LACK OF PHYSICAL

OPPORTUNITIES:

- SCALE FROM

BECOMING A CEO: PROFITING FROM YOUR PURPOSE

STAGE 4

\$1MM ++

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4 STAGES

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UPGRADING
TO A SUSTAINABLE

STAGE 2

\$250,000 - \$500,000

CHALLENGES:

- UNWILLING TO LET GO OF THE "A-TIME"
- AD-HOC DECISIONS
- OUTGROWING PHYSICAL PLANT
- BUILDING A TEAM

OPPORTUNITIES:

- SYSTEMATIZING THE FIRM
- MORE TIME FOR PERSONAL LIFE
- REVENUE GROWTH
- MORE PREPARED FOR THE FUTURE

GROWING YOUR BUSINESS
TO BREAK 7 FIGURES

STAGE 3

\$500,000 - \$1MM

CHALLENGES:

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- FEEDING THE FACTORY
- OUTGROWING PHYSICAL PLANT

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GROWTH

BECOMING A CEO: PROFITING FROM YOUR PURPOSE

STAGE 4

\$1MM ++

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4 STAGES

BECOMING A CEO: PROFITING FROM YOUR PURPOSE

GROWTH

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UPGRADING
TO A SUSTAINABLE

STAGE 2

\$250,000 - \$500,000

CHALLENGES:

- UNWILLING TO LET GO OF THE "A-TIME"
- AD-HOC WORK
- OUTSOURCING
- BUILDING A TEAM

OPPORTUNITIES:

- SYSTEMATIZING
- FORMALIZING
- MORE CLARITY
- REVEALING MORE POTENTIAL

STAGE 4

\$1MM ++

CHALLENGES:

- LONELINESS
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BUSINESS
RESOURCES

STAGE 3

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BECOMING A CEO: PROFITING FROM YOUR PURPOSE

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ASSESSMENT

- ⚙ *Where is your business now?*
- ⚙ *Where do you want it to be?*
- ⚙ *Why isn't it there yet?*

PEOPLE

MARKETING

.....

THE 6 STAGES

OF A SUCCESSFUL LAW FIRM



HOW TO
MANAGE
A SMALL
LAW FIRM



HOW CONFIDENT ARE YOU THAT EACH OF THE
7 MAIN PARTS **OF YOUR BUSINESS**
WILL CONTINUE
TO BE EFFECTIVE WITH YOU
AWAY FROM THE BUSINESS FOR
30 CONSECUTIVE DAYS?



THINKING QUESTION (AND PART OF THE PROBLEM)

WHAT IS THE **#1**
NO EXCUSES
REASON

WHY YOU ARE **COMMITTED** TO IMPROVING THE
PERFORMANCE OF YOUR BUSINESS?

.....

YOUR BUSINESS IS A VEHICLE



SESSION 3

MARKETING - BUILDING A BUSINESS BY HELPING OTHERS

Done The Right Way

Marketing & Sales Makes Most Lawyers Very Happy



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and realize their dreams by building law firm businesses that work for them, and those who rely on them.

 @LAWFIRMBUSINESS

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QUESTION TO ANSWER

**HOW MANY CLIENT
PROSPECTS MUST
MARKETING DELIVER
TO SALES?**

PEOPLE

MARKETING

2 JOBS OF MARKETING

**1. TO DELIVER THE RIGHT KIND OF PROSPECT
TO THE RIGHT PLACE
AT THE RIGHT TIME
IN THE RIGHT QUANTITY
WITH THE RIGHT EXPECTATIONS
IN THE RIGHT FRAME OF MIND**

PEOPLE

2. TO KEEP EVERYONE ELSE THE HELL AWAY & TO PROTECT THE BUSINESS.

MARKETING

.....

COMMON MARKETING MISTAKES

- ❏ *Too Many New Client Prospects to Sales*
- ❏ *Right Kinds of Clients at the Wrong Time*
- ❏ *Right Clients, Right Time, Wrong Expectations or Wrong Frame of Mind*

PEOPLE

MARKETING

.....

THE RIGHT KIND OF PROSPECT

4 TYPES OF PROSPECTIVE NEW CLIENTS:

1. The True Believer

2. The Skeptic With Criteria

3. The Skeptic With No Criteria

4. The Naysayer

PEOPLE

MARKETING

WHO DO YOU WANT?

GRADE YOUR CLIENTS

PEOPLE

MARKETING

A

B

C

D

F

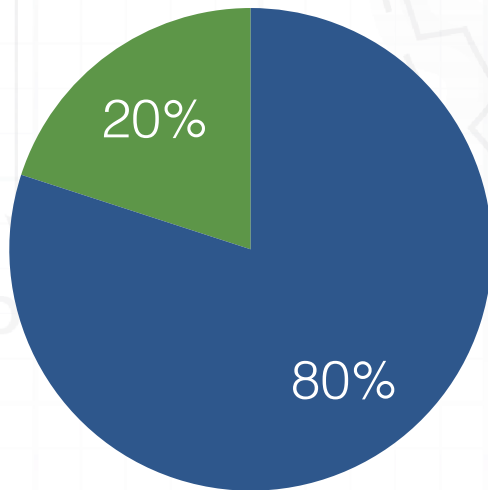
Types of cases we take

Types of cases we don't take

WHO DO YOU WANT?

GRADE YOUR CLIENTS

Profits



A

B

C

D

F

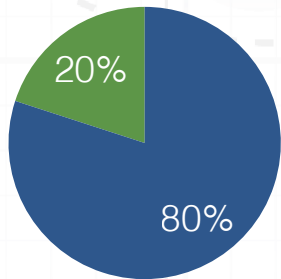
Types of cases we take

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WHO DO YOU WANT?

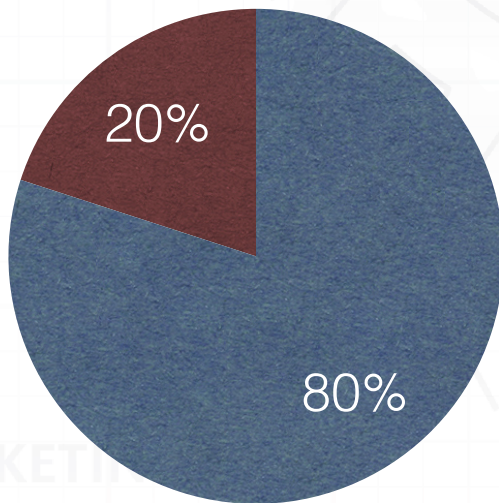
GRADE YOUR CLIENTS

Profits



PEOPLE

Busy-ness



MARKET

A

B

C

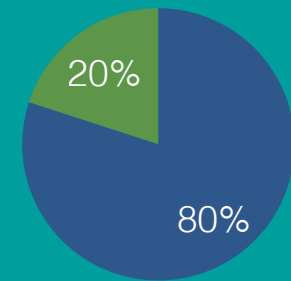
D

F

Types of cases we take

Types of cases we don't take

BUILD A CLIENT PERSONA



LINDSEY



“Successful business person who enjoys adventure travel.”

Occup’n : Professional (Finance, Management)
Role : Junior VP
Demogs : Skews Male
Age 27-35
HH Income: \$125 - 225
Young children

Lindsey is a successful entrepreneur who strives to push the envelope in everything she does, at work, at home, and in travel. She is a young parent, and beginning to consider how her plans are consistent with her expectations for the childrens’ education, and her own retirement, young enough to let the adventure continue.

Background & Skills

- 5-10 years experience
- MBA or equivalent
- Advance Management Training
- Feeling used by the corporation, looking for something more

Motivations

- Wants to be secure in income growth path
- Concerned about college costs for kids
- Wants to be more “present” in her life.
- Looking for more “meaning.”

Goals

- To have the freedom to make important changes.
- To secure retirement income by age 55.
- To have colleges fully funded by childrens’ 17th birthday.

Pain points

- Time is owned by current employment.
- “Golden Handcuffs” due to uncertainty.
- Inability to include family in wealth discussions

MARKETING PLAN

PEOPLE

MARKETING

PRODUCTION



MARKETING PLAN



NET INCOME GOAL:

From your definition of a successful business.

GROSS REVENUE REQ:

VALUE AVG CASE:

HOW MANY CASES DOES THE FIRM NEED?

CHEAT SHEET

$\text{NET} \times 2 = \text{GROSS}$

$\text{GROSS} / \text{AVG VAL} = \text{\#CASES}$

HISTORICAL CONVERSION RATE:

HOW MANY PNC DOES MARKETING HAVE TO DELIVER?

PER YEAR:

PER MONTH:

PER WEEK:



MARKETING PLAN-CLASSIC

	Annual	Monthly	Weekly
Net Revenues	\$500,000	\$41,667	\$9,615
Gross Revenues (x2)	\$1,000,000	\$83,333	\$19,231
Average Case Value	\$5,000	\$5,000	\$5,000
= # of New Cases Needed	200	17	4
Historical Conversion Rate	50%	50%	50%
Sales Calls Needed = NCN/HCR	400	33	8
Funnel Conversion Rate	2%	2%	2%
Exposures Needed = SCN/FCR	20000	1667	385



MARKETING PLAN-PPC

	Annual	Monthly	Weekly
Net Revenues	\$500,000	\$41,667	\$9,615
Gross Revenues (x2)	\$1,000,000	\$83,333	\$19,231
Average Case Value	\$5,000	\$5,000	\$5,000
= # of New Cases Needed	200	17	4
Historical Conversion Rate	50%	50%	50%
Sales Calls Needed = NCN/HCR	400	33	8
Funnel Conversion Rate	5%	5%	5%
Clicks Needed = SCN/FCR	8000	667	154

MARKETING FUNNEL

PEOPLE

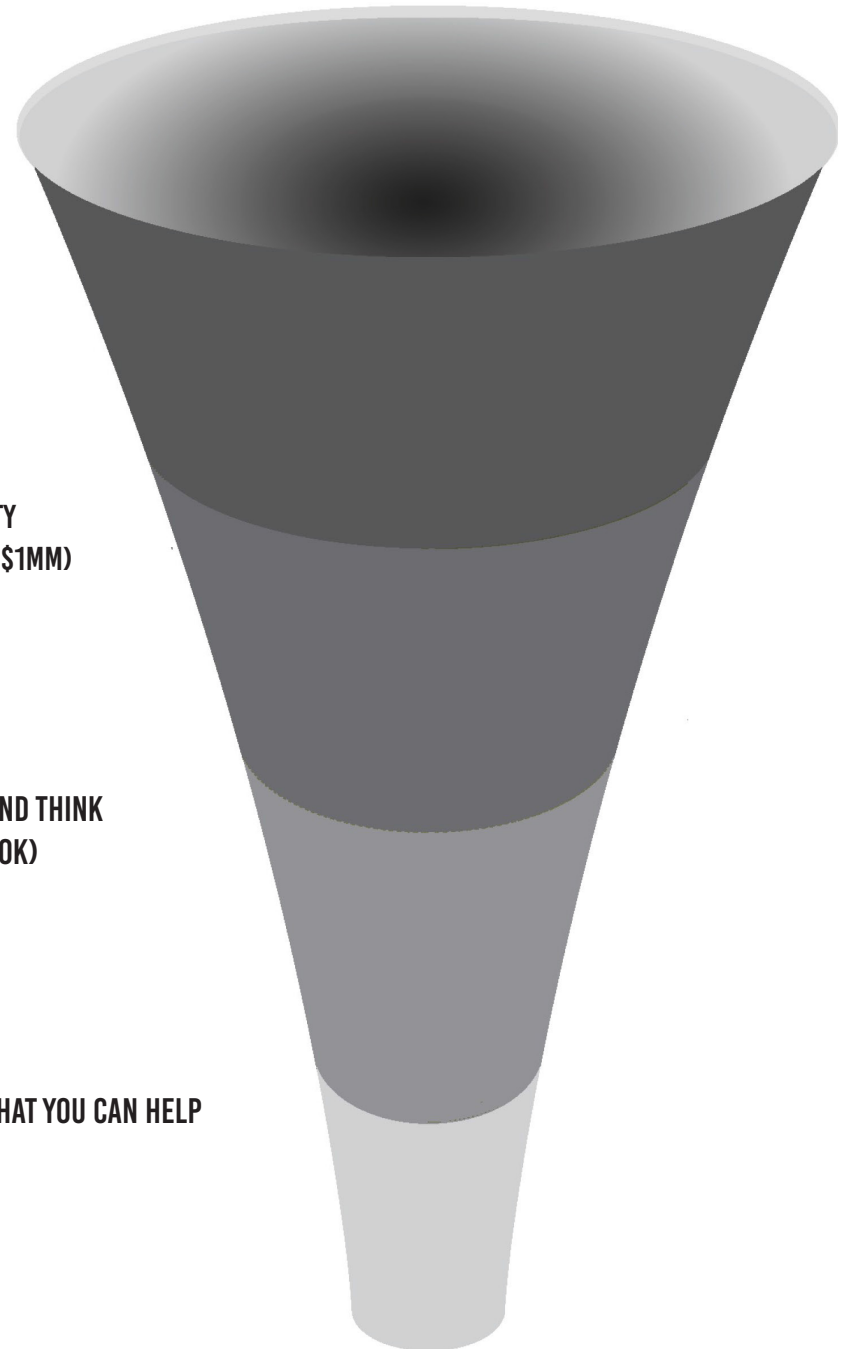
MARKETING

HAVE A PROBLEM OR OPPORTUNITY THEY
DON'T KNOW ABOUT (\$1MM+)

KNOW THEY HAVE A PROBLEM OR OPPORTUNITY
AND ARE LOOKING FOR A SOLUTION (\$500K – \$1MM)

THEY HAVE A PROBLEM OR OPPORTUNITY AND THINK
YOU MIGHT BE THE SOLUTION (\$250 – \$500K)

THEY HAVE A PROBLEM OR OPPORTUNITY THAT YOU CAN HELP
THEM SOLVE (0 – \$250K)



SAMPLE STRATEGIES

PEOPLE

MARKETING

EXAMPLES:

MONTHLY INVESTMENT:

PAPER NEWSLETTER MAILED EVERY MONTH FOR 12 MONTHS TO: 500 FORMER CLIENTS; 100 STRATEGICALLY-CHOSEN POTENTIAL REFERRAL SOURCES; ALL 100 CURRENT CLIENTS; AND 300 PROSPECTIVE NEW CLIENTS WE'VE MET THROUGH NETWORKING, WHO REQUESTED IT FROM THE WEBSITE, AND JUST IN OUR DAILY DEALINGS.

\$2,500

PURSUDE RELEVANT-INDUSTRY SPEAKING ENGAGEMENTS

\$1,000

"WORK" AN INDUSTRY NETWORKING EVENT TWICE-A-MONTH EVERY MONTH FOR 12 MONTHS. "WORKING" A NETWORKING EVENT IS NOT THE SAME THING AS JUST GOING THERE AND SOCIALIZING WITH A BUNCH OF PEOPLE YOU ALREADY KNOW OR JUST GOING THERE TO TRY & MEET EVERYONE IN THE ROOM. THE GROUP MUST BE CHOSEN STRATEGICALLY, THERE MUST BE AN IN-ROOM STRATEGY, AND A FOLLOW-UP STRATEGY TOO.

\$500

BEGIN EXPERIMENTING-WITH AND TESTING ONLINE ADS

\$500

MAINTAIN MONTHLY FILE REVIEW & STATUS-REPORT PROCEDURES WITH ALL CURRENT CLIENTS.

\$500

MAINTAIN FORMER CLIENT COURTESY CHECK-IN PROCEDURE

\$500

WEBSITE STRATEGY TO BUILD YOUR LIST. MEANING, YOUR WEBSITE SHOULD HAVE A STRATEGY THAT CAUSES THE RIGHT KINDS OF PROSPECTIVE CLIENTS TO REQUEST MORE INFORMATION IF THEY'RE NOT READY TO SCHEDULE AN APPOINTMENT RIGHT NOW.

\$100

INTERVIEW POTENTIAL REFERRAL SOURCES AND ASSEMBLE YOUR "TEAM 100"

\$100

ELECTRONIC VERSION OF PAPER NEWSLETTER EMAILED TO ALL OF THE ABOVE PLUS 2,500 MORE POTENTIAL NEW CLIENTS AND REFERRAL SOURCES WHO REQUESTED IT VIA THE WEBSITE, SOCIAL MEDIA, ETC.

\$100

MAINTAIN YOUR RAINMAKING ROLODEX

\$25

MAKE 3 REFERRALS PER WEEK

\$0

SOCIAL MEDIA STRATEGY

\$0

TOTAL ANNUAL INVESTMENT:

\$68,800

ROI:

\$400,000 (580%)



BONUS!!!

151 THINGS YOU CAN DO TO MARKET YOUR SOLO LAW FIRM

DOWNLOAD THE COMPLIMENTARY LIST AT

WWW.HOWTOMANAGEASMALLLAWFIRM.COM/151MARKETING

.....

SESSION 4

MARKETING EXECUTION

*The small law firm's guide to implementing
effective marketing campaigns*



CHRISTOPHER T. ANDERSON

Entrepreneurial attorney with a passion for helping lawyers define and achieve success:



- ⚙️ FINANCIALLY
- ⚙️ PERSONALLY
- ⚙️ PROFESSIONAL

and realize their dreams by building law firm businesses that work for them, and those who rely on them.

 @LAWFIRMBUSINESS

 LAWFIRMBUSINESS



THE 5 COMMANDMENTS

**THOU SHALT NOT ENGAGE IN ANY MARKETING
ACTIVITY, UNLESS:**

- 1. YOU HAVE A HYPOTHESIS OF WHAT THE RESULT WILL BE (ROI)**
- 2. YOU HAVE A CALL TO ACTION**
- 3. YOU COMMIT TO MEASURE YOUR RESULTS AGAINST YOUR HYPOTHESIS**
- 4. YOU COMMIT TO LEARN FROM YOUR MEASUREMENTS**
- 5. YOU COMMIT TO TAKE ACTION BASED ON WHAT YOU HAVE LEARNED**

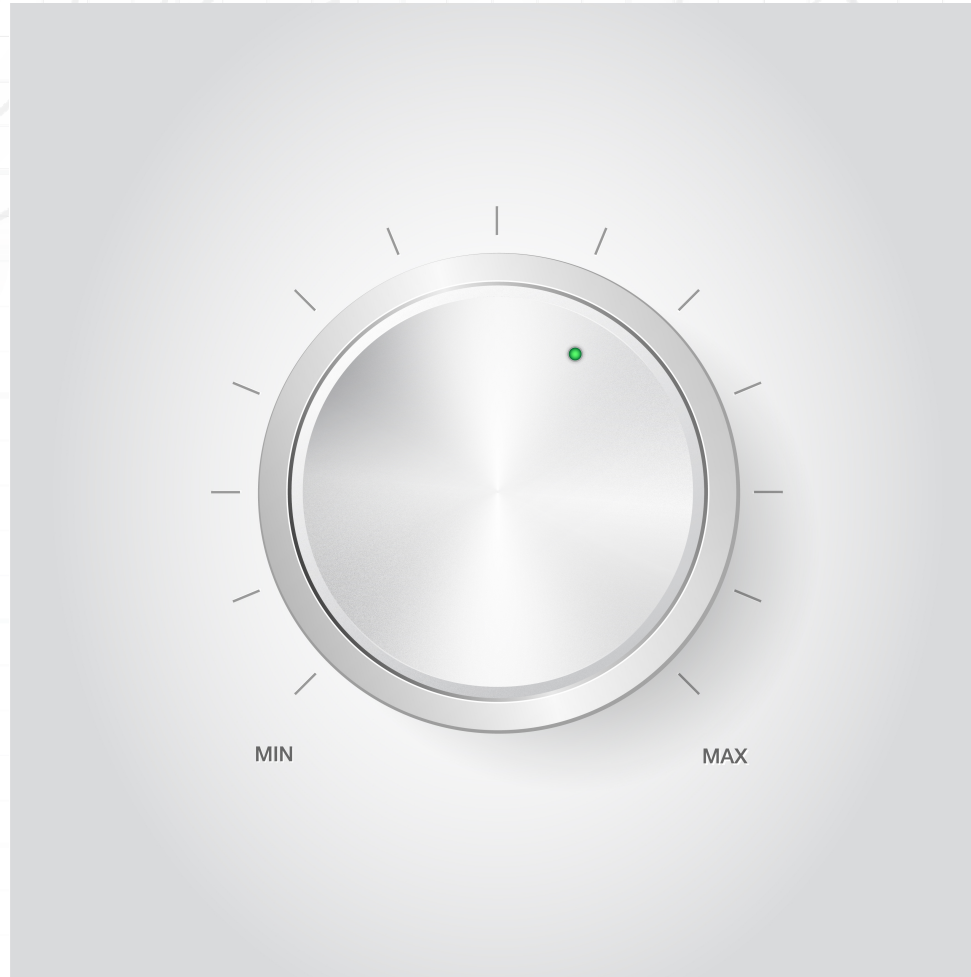
MARKETING CAMPAIGN

	Campaign 1
CPM	
CPC	
Impresssions	
“Click”	
Action(s)	
(Screening)	
Set Appointment	
Show Up	
Buy	
CPA	

MARKETING CAMPAIGN

	PPC	
CPM		
CPC	\$2.50	
Impresssions		39,683
	2%	
“Click”		794
	20%	
Action(s)		159
	20%	
Set Appointment		32
	70%	
(Screening)		22
	90%	
Show Up		20
	50%	
Buy		10
CPA		\$198

MARKETING CAMPAIGN

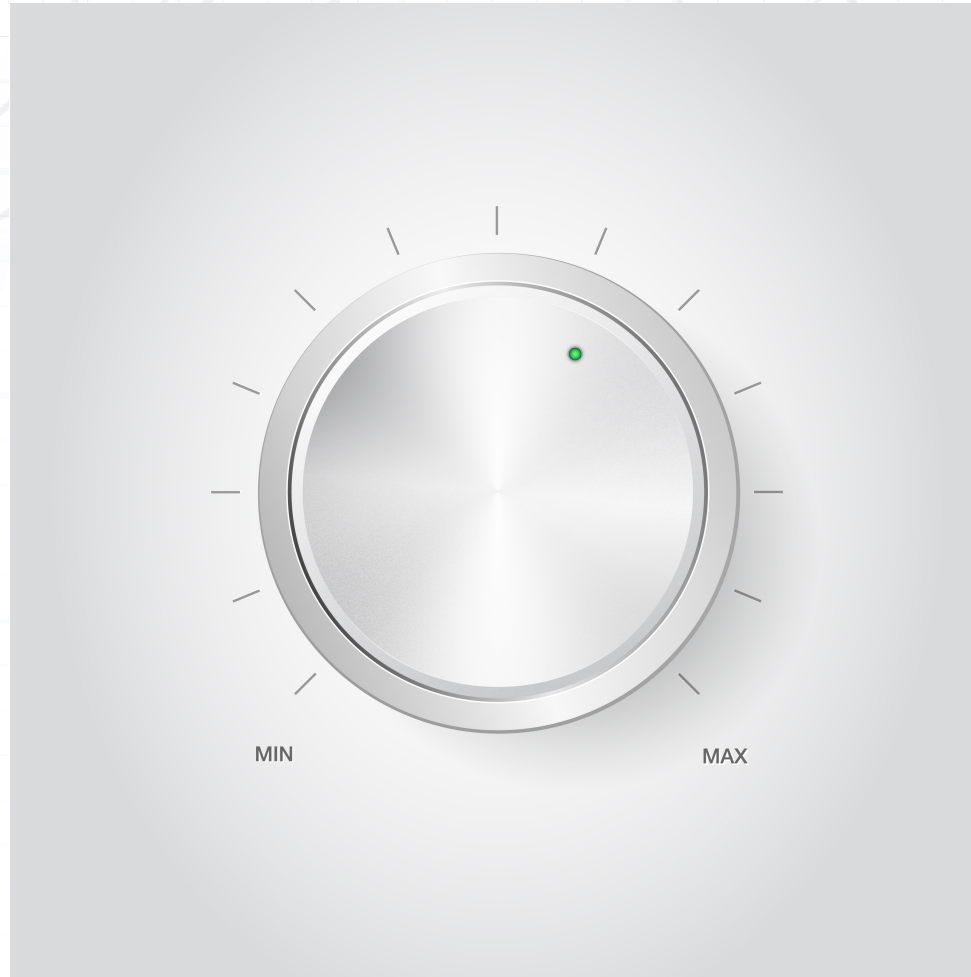


PEOPLE

MARKETING

PAY PER CLICK

MARKETING CAMPAIGN



PEOPLE

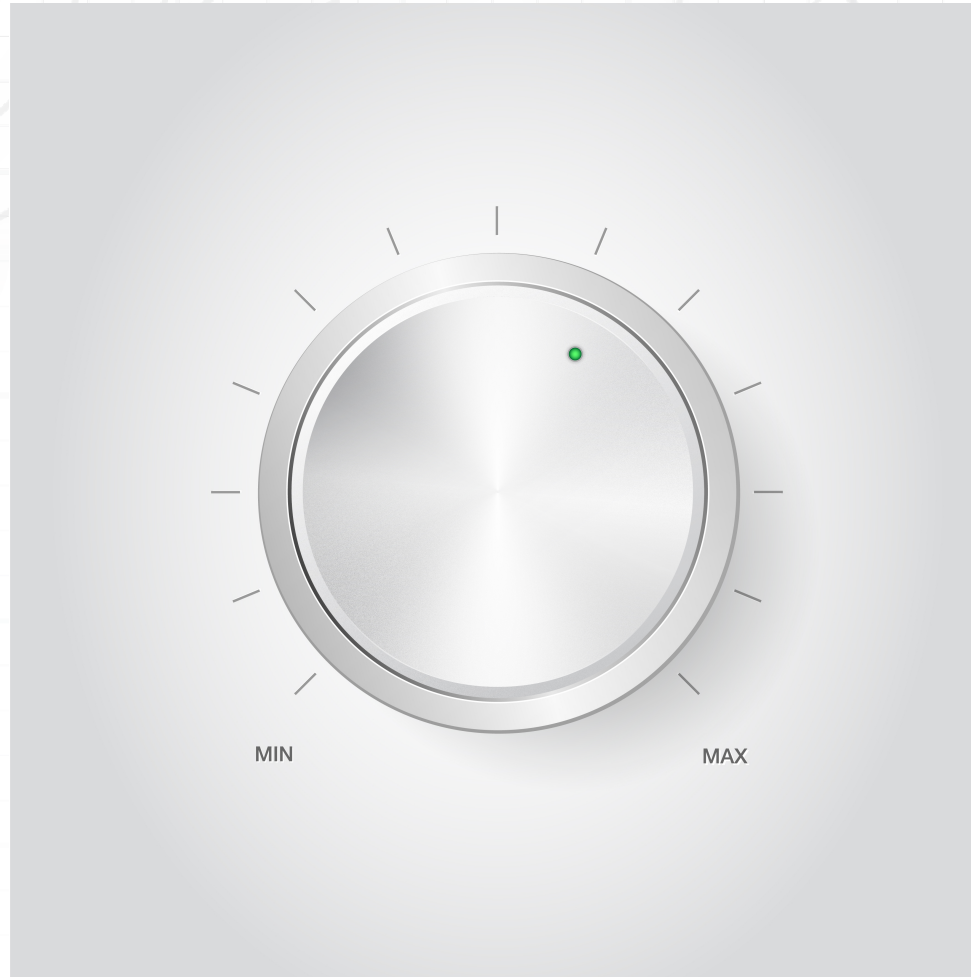
MIN

MAX

MARKETING

SOCIAL MEDIA

MARKETING CAMPAIGN

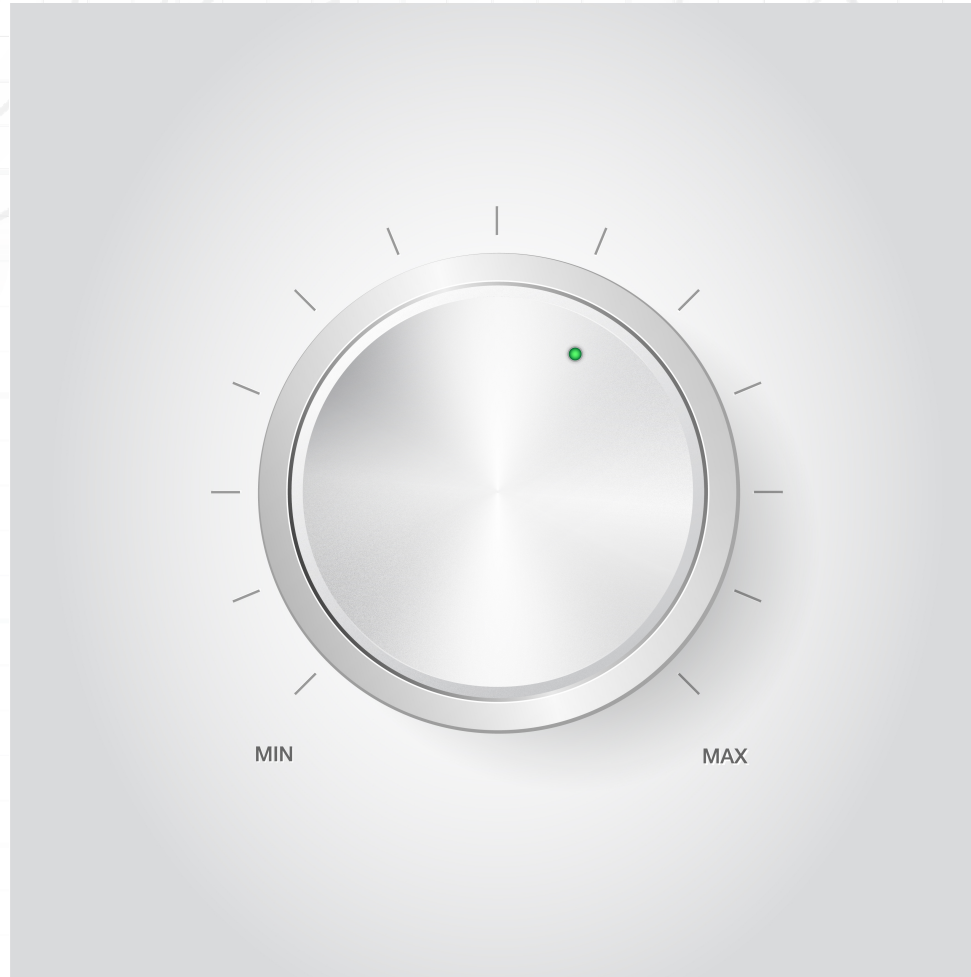


PEOPLE

MARKETING

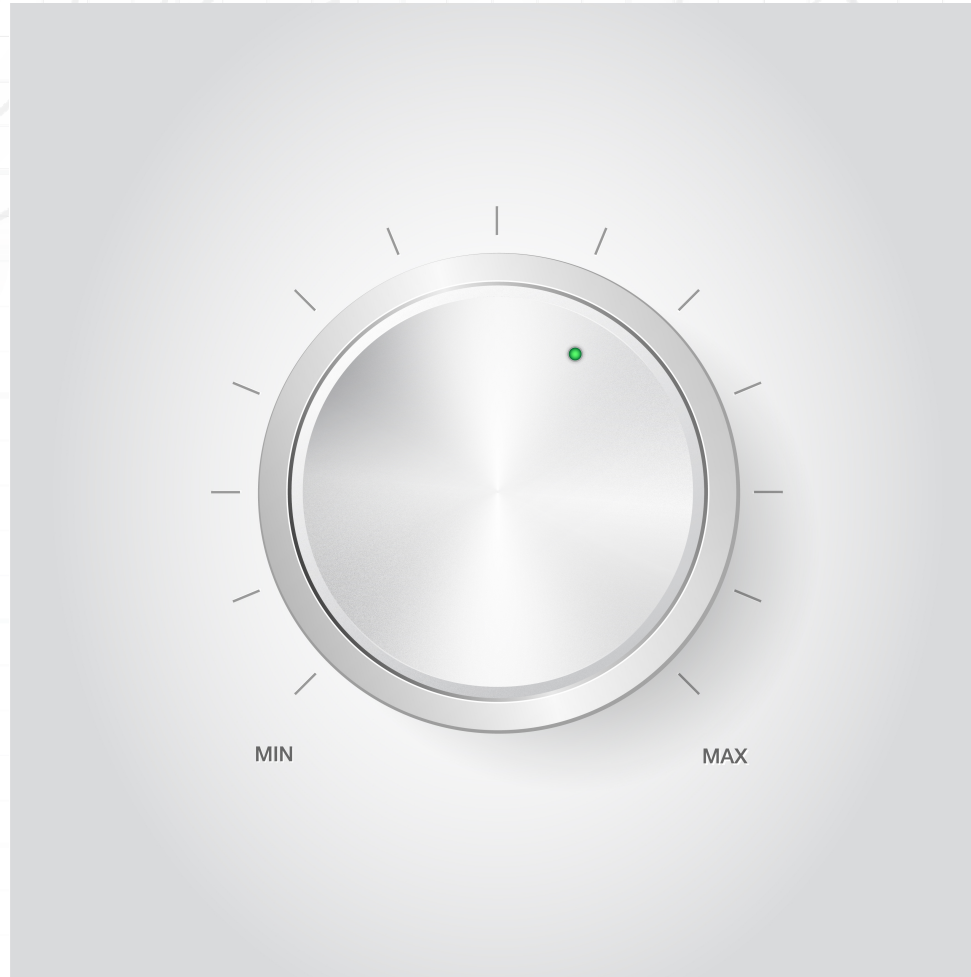
YOUR WEBSITE

MARKETING CAMPAIGN



PRINT ADVERTISING

MARKETING CAMPAIGN

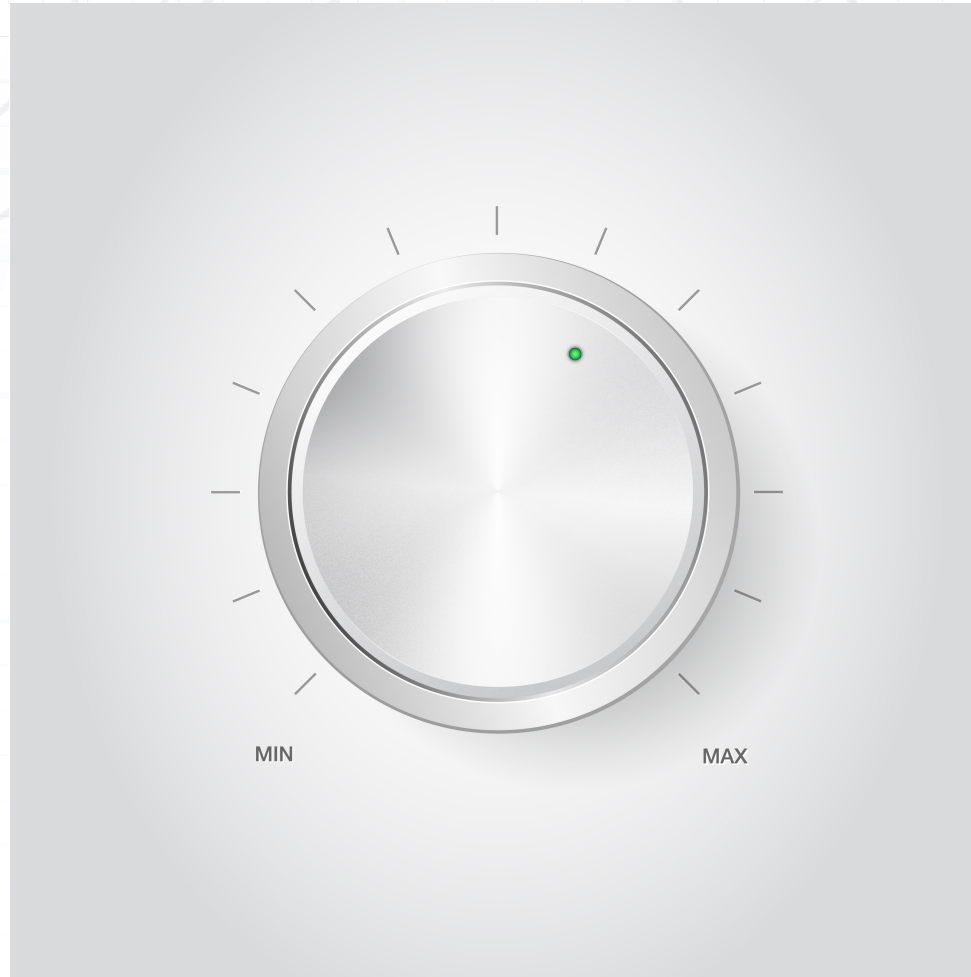


PEOPLE

MARKETING

WORKSHOPS

MARKETING CAMPAIGN

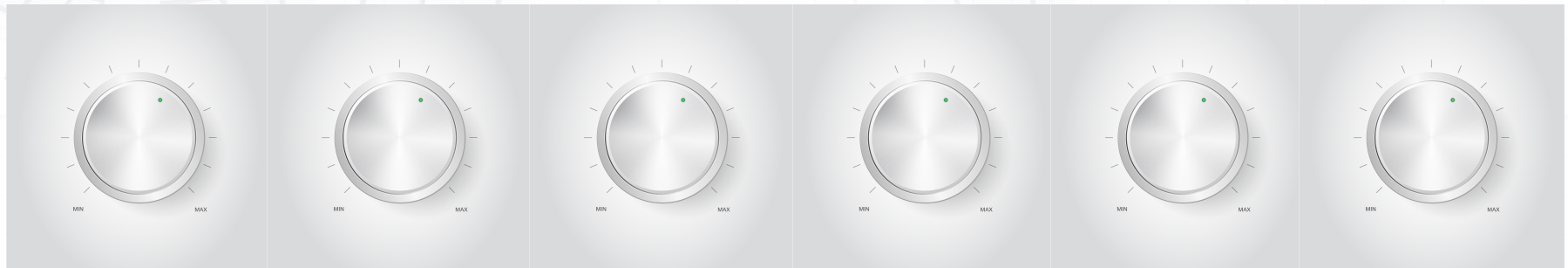


PEOPLE

MARKETING

RADIO

MARKETING STRATEGIES



PPC

SOCIAL

WEBSITE

PRINT

WORKSHOPS

RADIO

PEOPLE

MARKETING

WHAT TO DO WHEN ONE FAILS?



PPC

SOCIAL

WEBSITE

PRINT

WORKSHOPS

RADIO

PEOPLE

MARKETING

MARKETING CAMPAIGN

	PPC Campaign	Facebook	Radio	Billboard
CPM			\$15.00	\$5.00
CPC	\$2.50	\$1.00		
Impresssions	39,683	5,511	69,444	347,222
	2%	4%	0.5%	0.1%
“Click”	794	220	347	347
	20%	40%	100%	100%
Action(s)	159	88	347	347
	20%	30%	30%	30%
(Screening)	32	26	104	104
	70%	70%	30%	30%
Set Appointment	22	19	31	31
	90%	90%	80%	80%
Show Up	20	17	25	25
	50%	60%	40%	40%
Buy	10	10	10	10
CPA	\$198	\$22	\$104	\$174

MARKETING CAMPAIGN

	Campaign 1	Campaign 2	Campaign 3	Campaign 4	Campaign 5	Campaign 6
CPM						
CPC						
Impresssions						
“Click”						
Action(s)						
(Screening)						
Set Appointment						
Show Up						
Buy						
CPA						

FUNDING YOUR MARKETING WITH A “TAX”



SAMPLE STRATEGIES

PEOPLE

MARKETING

EXAMPLES:

MONTHLY INVESTMENT:

PAPER NEWSLETTER MAILED EVERY MONTH FOR 12 MONTHS TO: 500 FORMER CLIENTS; 100 STRATEGICALLY-CHOSEN POTENTIAL REFERRAL SOURCES; ALL 100 CURRENT CLIENTS; AND 300 PROSPECTIVE NEW CLIENTS WE'VE MET THROUGH NETWORKING, WHO REQUESTED IT FROM THE WEBSITE, AND JUST IN OUR DAILY DEALINGS.

\$2,500

PURSUDE RELEVANT-INDUSTRY SPEAKING ENGAGEMENTS

\$1,000

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.....

SESSION 5.1

SUPER NETWORKING

*Stop NetSocializing and
Start NetWorking*



CHRISTOPHER T. ANDERSON

Entrepreneurial attorney with a passion for helping lawyers define and achieve success:



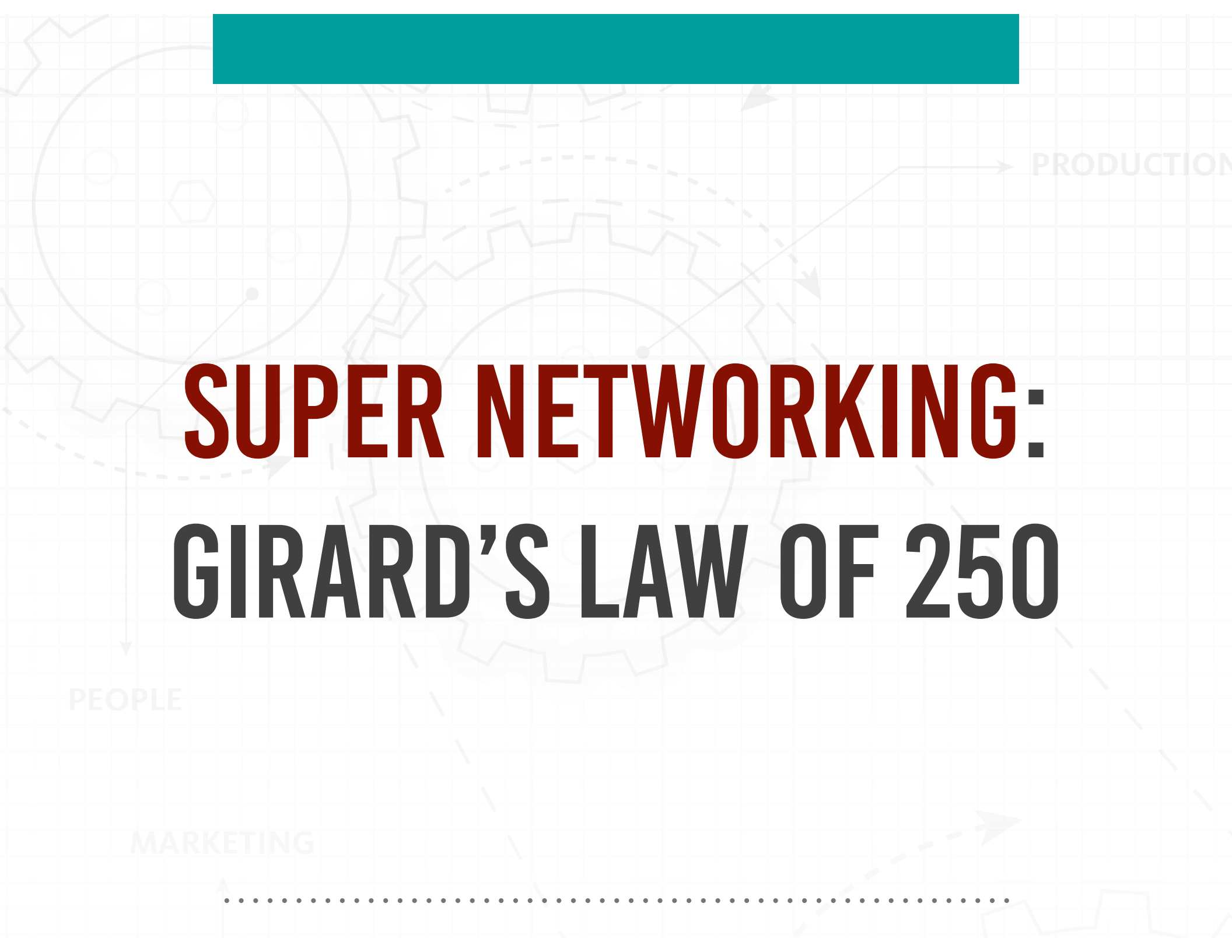
- ⚙️ FINANCIALLY
- ⚙️ PERSONALLY
- ⚙️ PROFESSIONAL

and realize their dreams by building law firm businesses that work for them, and those who rely on them.

 @LAWFIRMBUSINESS

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SUPER NETWORKING: **GIRARD'S LAW OF 250**

YOUR NETWORK OF 250

- ⚙️ *Top of Mind - Who do you know?*
- ⚙️ *Memory Jog #1 - use a list of professions (YP)*
- ⚙️ *Memory Jog #2 - Last names (WP)*
- ⚙️ *Memory Jog #3 - First names (Common List)*

PEOPLE
MARKETING

.....



Christopher Anderson

1st

Law Firm Business Expert, National Speaker, Attorney Professional Development Coach, Lawyer, Thought Leader

New York, New York | Legal Services

Current	How To MANAGE a Small Law Firm.com, AndersonDodson, P.C.
Previous	LexisNexis, Timmons, Warnes & Anderson, LLP, District Attorney, Western Judicial Circuit
Education	University of Georgia School of Law

Send a message



500+
connections

MARKETING

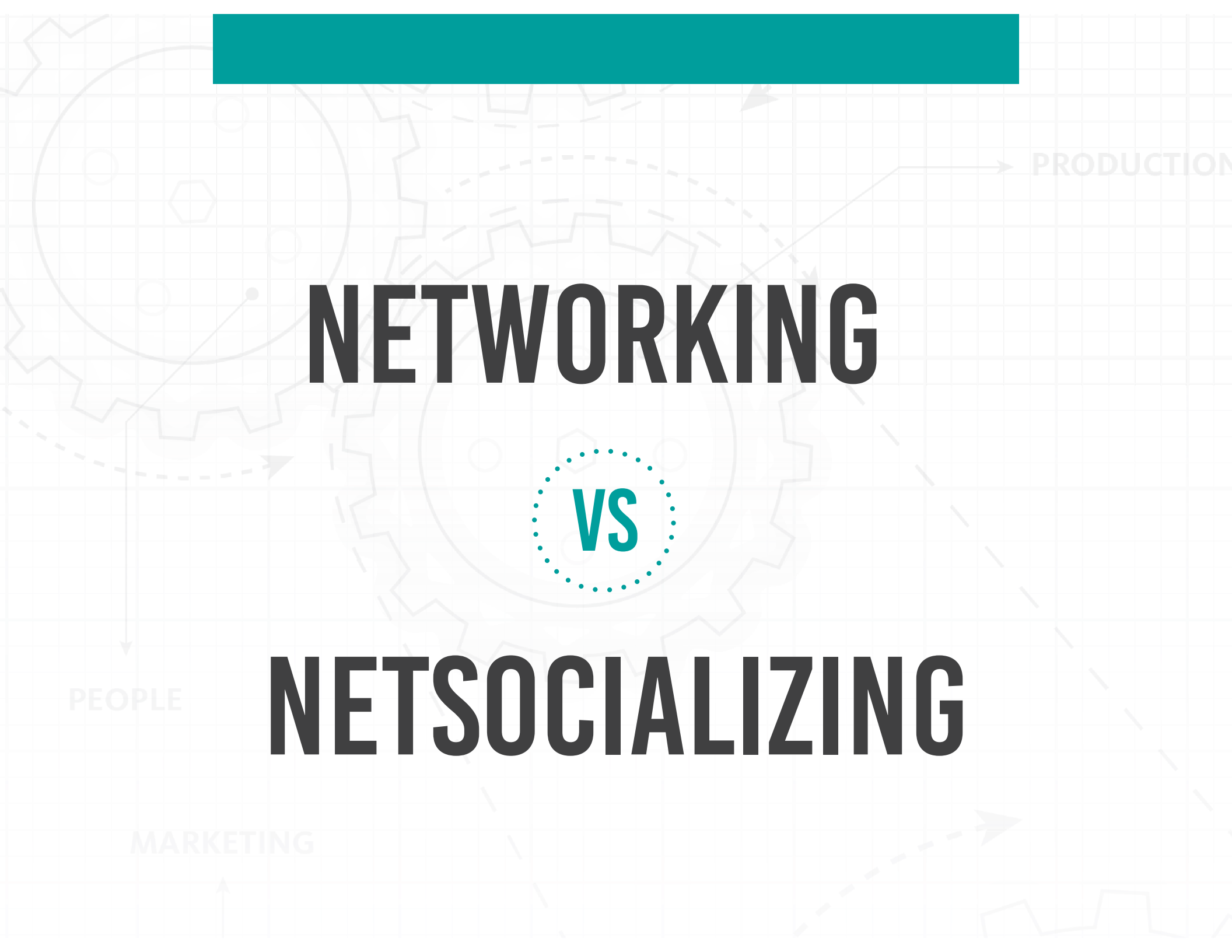
PRODUCTION

SPHERE OF INFLUENCE

- ⚙️ *These are not (primarily) your buyers*
- ⚙️ *Cultivate as your referral sources*
- ⚙️ *People refer business to people they know, like and trust*
- ⚙️ $250^2 = 62,500$ (to vicariously know, like and trust you)

PEOPLE
MARKETING

.....



NETWORKING

VS

NETSOCIALIZING

NETWORKING

NETWORKING IS **NOT**

- ⚙ *Selling!*
- ⚙ *Not about distributing business cards*
- ⚙ *Not about shaking hands*
- ⚙ *About you!*

IT IS ALL ABOUT THEM!

PEOPLE

MARKETING

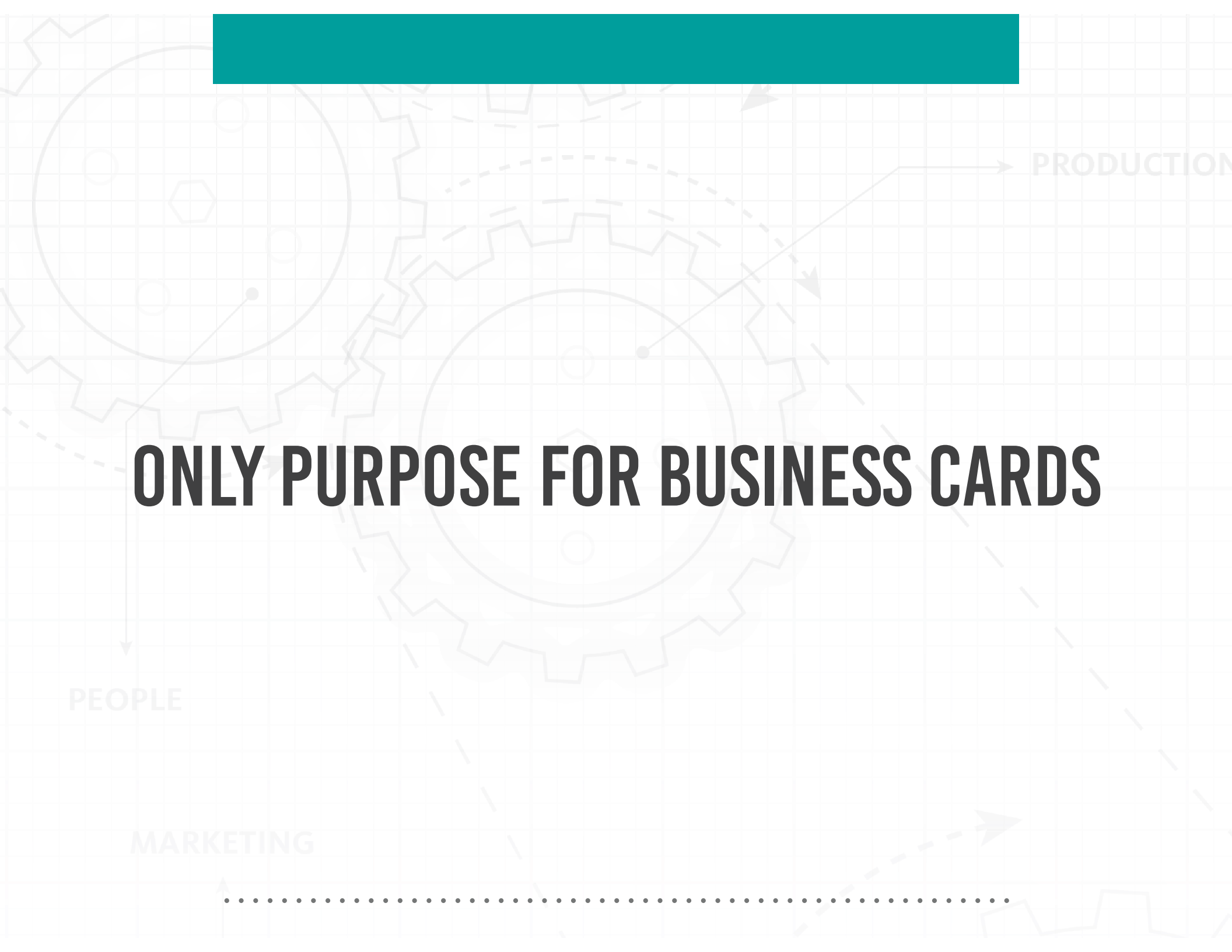


NETWORKING GOALS

- ⚙️ *Talk to Key Influencers*
- ⚙️ *Small Number Goals (x250!)*
- ⚙️ *Talk about their favorite topic (10 Questions)*
- ⚙️ *Main Goal: “How can I refer you business?”*
 - *Even if they reciprocate and clearly need your service*
 - *Turn it around to be about them. They don’t know, trust and like you, YET!*

.....

-
1. How did u get started in this line of work
 2. What do you enjoy most about what you do?
 3. What separates your company from the competition?
 4. What advice would you give to someone just starting out in your line of work?
 5. What one thing would you do with your business if you knew you could not fail?
 6. What significant changes have you seen take place in your industry over the years?
 7. What do you see as the coming trends in the widget business?
 8. Describe the strangest/ funniest event in your business
 9. What ways have you found to be the most productive for promoting your business?
 10. What one sentence would you like somebody to say as describing your business?
 11. Who is your ideal client / who can I refer to you?

The background features a light gray grid with faint, stylized illustrations of interlocking gears. Various business-related terms are scattered around: 'PRODUCTION' is at the top right, 'PEOPLE' is on the left, and 'MARKETING' is at the bottom left. Dashed lines with arrows suggest a flow or cycle between these elements. A solid teal rectangle is positioned at the very top of the image.

ONLY PURPOSE FOR BUSINESS CARDS

NETWORKING - EXERCISE

MAGIC STATEMENT

*"My business helps _____ accomplish/solve/defeat/
avoid _____ by _____."*

MARKETING

.....

SESSION 5.2

AUTOMATIC REFERRALS

How to trigger more repeat and referral business from current and former clients



CHRISTOPHER T. ANDERSON

Entrepreneurial attorney with a passion for helping lawyers define and achieve success:



- ⚙️ FINANCIALLY
- ⚙️ PERSONALLY
- ⚙️ PROFESSIONAL

and realize their dreams by building law firm businesses that work for them, and those who rely on them.

 @LAWFIRMBUSINESS

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CULTIVATING LOYAL REFERRAL SOURCES

⚙️ *1st Contact – “Nice to Meet You” note
(handwritten)*

- *Special Stationery*
- *With your Picture*

⚙️ *Stay Top of Mind*

- *Thinking of you*
- *Newsletter*

⚙️ *Refer business!!!!*

⚙️ *Thank You for referrals*

⚙️ *Make the Referrer Look Good!*

TEAM 100

The background features a light gray grid with faint, stylized illustrations of interlocking gears and dashed arrows indicating a clockwise flow. The words 'PEOPLE', 'MARKETING', and 'PRODUCTION' are positioned at the bottom left, bottom center, and top right respectively, connected by dashed lines that form a circular path around the central text.

PEOPLE

MARKETING

PRODUCTION



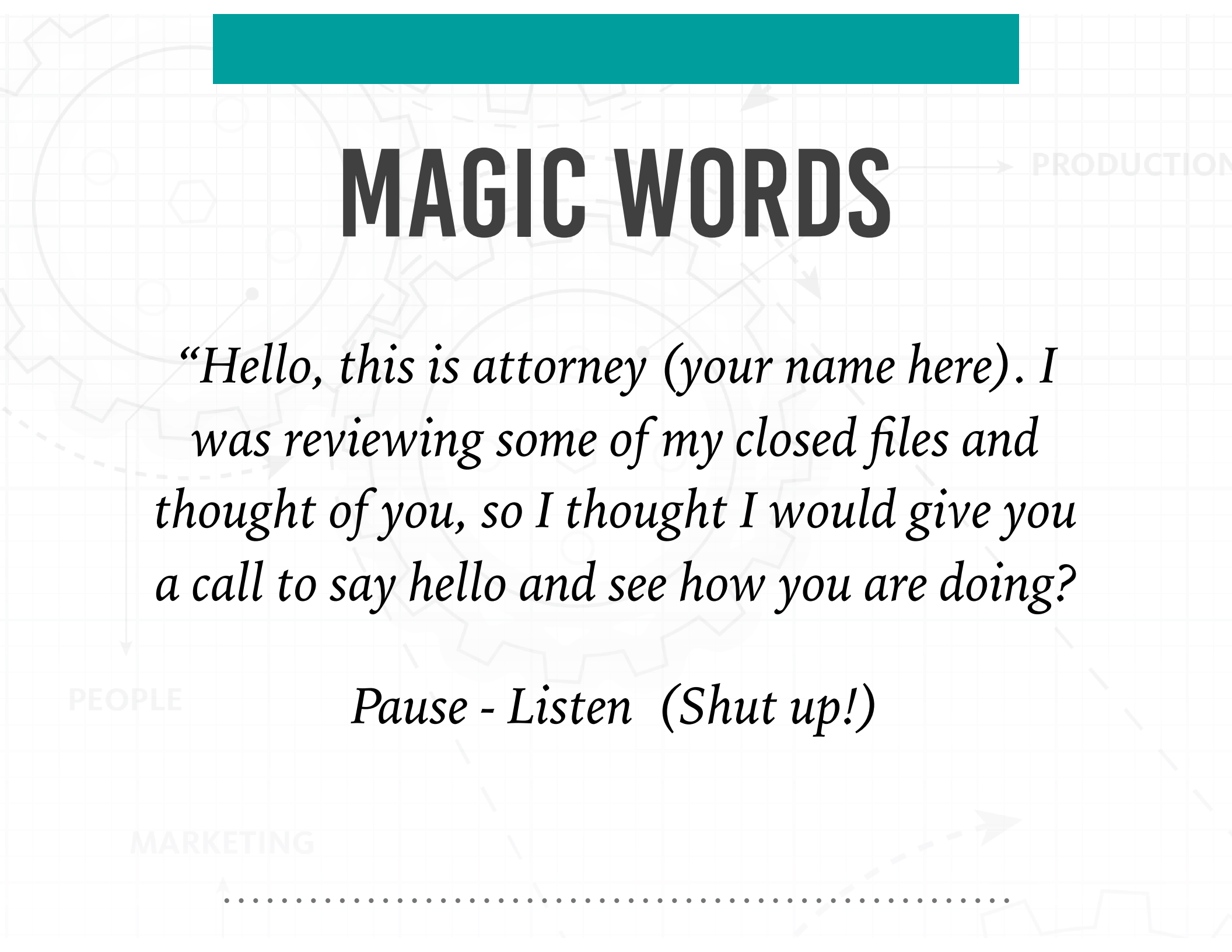
TEAM 100 FOLLOW-UP

- **PROFILE 2-3 FROM YOUR LIST**
 - **PROVIDE UPDATE ON YOUR BUSINESS**
 - **PRESENT SPECIAL OFFERS FROM OTHERS**
 - **PROMOTE - REMINDER HOW TEAM 100 WORKS**
- 





MAGIC WORDS



“Hello, this is attorney (your name here). I was reviewing some of my closed files and thought of you, so I thought I would give you a call to say hello and see how you are doing?”

Pause - Listen (Shut up!)





OTHER MAGIC WORDS

I've been looking ahead on my calendar, and I have some openings coming up in a few weeks to take on some more work.

So before I give-away that capacity to new clients I like to call my current clients and see, what else I can take off of your plate for you?

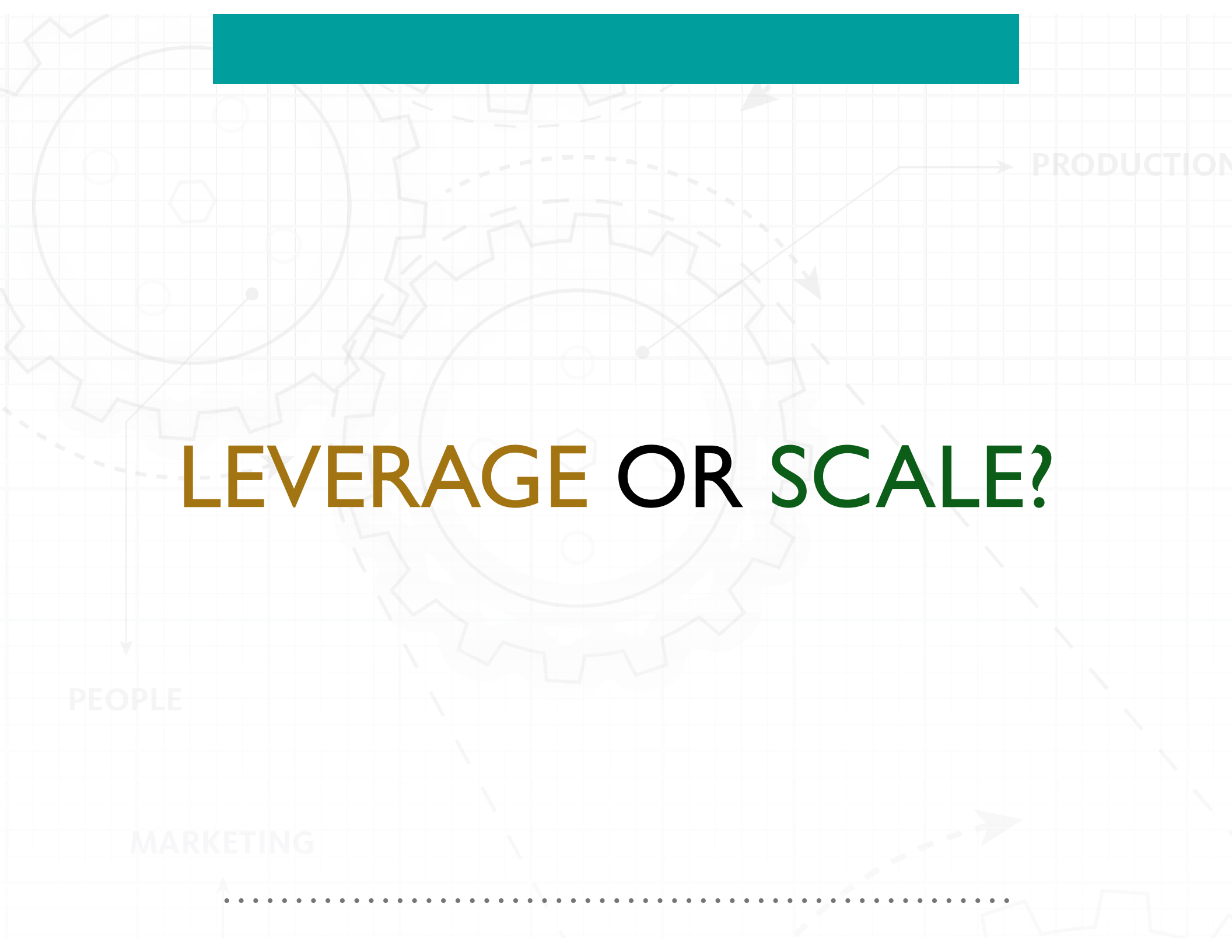
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SESSION 6

SYSTEMS: THE KEY TO SCALABILITY

Systems Run the Business
People Run the Systems



The background features a light gray grid with faint, stylized illustrations of interlocking gears. Various business-related terms are scattered around: 'PRODUCTION' in the top right, 'PEOPLE' on the left, and 'MARKETING' at the bottom left. Dashed lines and arrows suggest a flow or process. A solid teal rectangle is positioned at the top center.

LEVERAGE OR SCALE?

7 Main Systems in Your Business

YOU

Money & Metrics

Marketing

Sales

Physical Plant

Factory

People

PRODUCTION

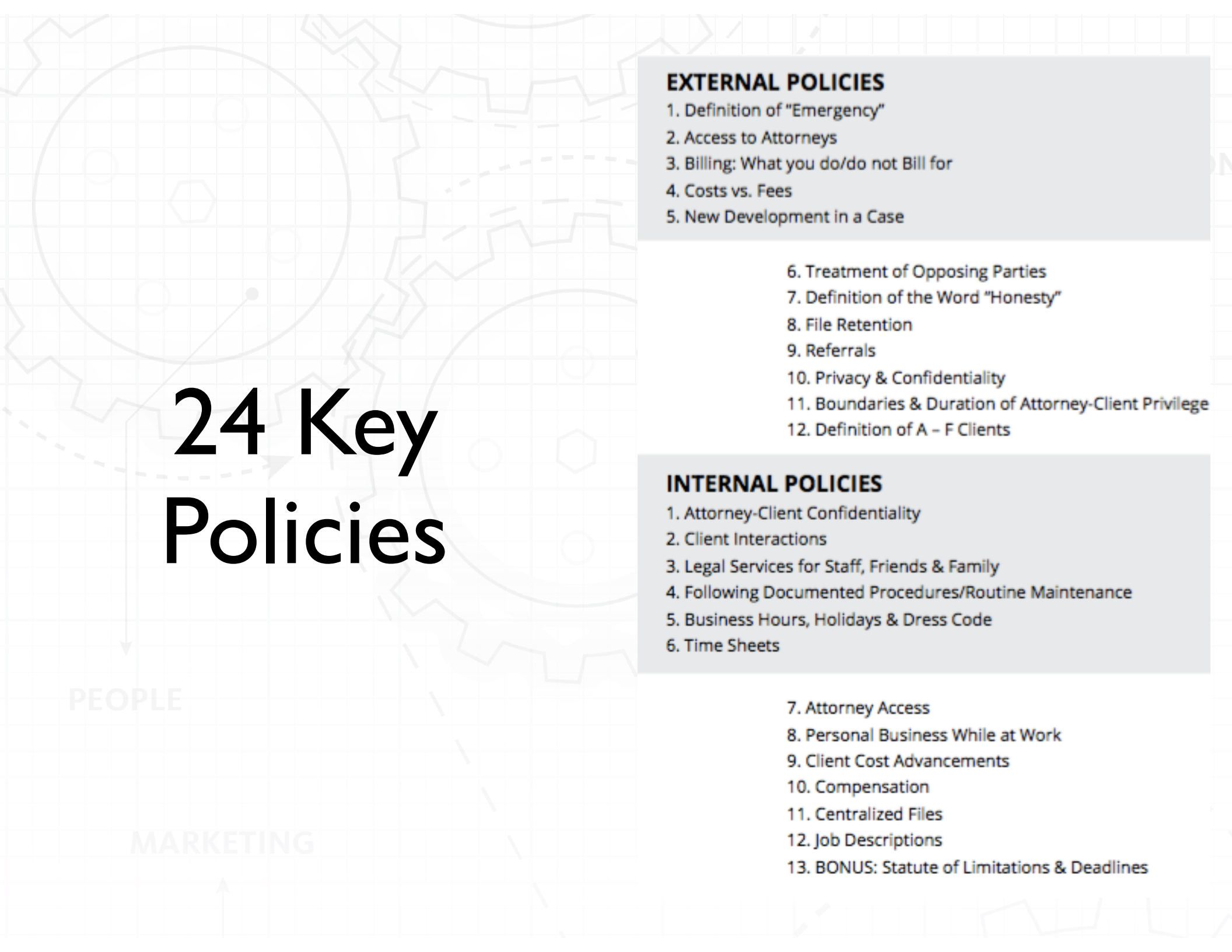
PEOPLE

MARKETING

.....

POLICIES





24 Key Policies

EXTERNAL POLICIES

1. Definition of "Emergency"
2. Access to Attorneys
3. Billing: What you do/do not Bill for
4. Costs vs. Fees
5. New Development in a Case

6. Treatment of Opposing Parties
7. Definition of the Word "Honesty"
8. File Retention
9. Referrals
10. Privacy & Confidentiality
11. Boundaries & Duration of Attorney-Client Privilege
12. Definition of A - F Clients

INTERNAL POLICIES

1. Attorney-Client Confidentiality
2. Client Interactions
3. Legal Services for Staff, Friends & Family
4. Following Documented Procedures/Routine Maintenance
5. Business Hours, Holidays & Dress Code
6. Time Sheets

7. Attorney Access
8. Personal Business While at Work
9. Client Cost Advancements
10. Compensation
11. Centralized Files
12. Job Descriptions
13. BONUS: Statute of Limitations & Deadlines

PEOPLE

MARKETING



PROCEDURES

PEOPLE

MARKETING



1. Answering the telephone and taking messages
2. Routine correspondence
3. Scheduling appointments
4. Calendaring, docketing and tickling deadlines with use of the electronic calendar and tickler system
5. Scheduling hearings, mediation and depositions

6. Opening a new file, case or matter for a new client
7. Opening a new file, case or matter for a current client
8. Monthly file review
9. File protocols
10. Closing files, cases and matters
11. Calculating and documenting statutes of limitations or other self-imposed deadlines

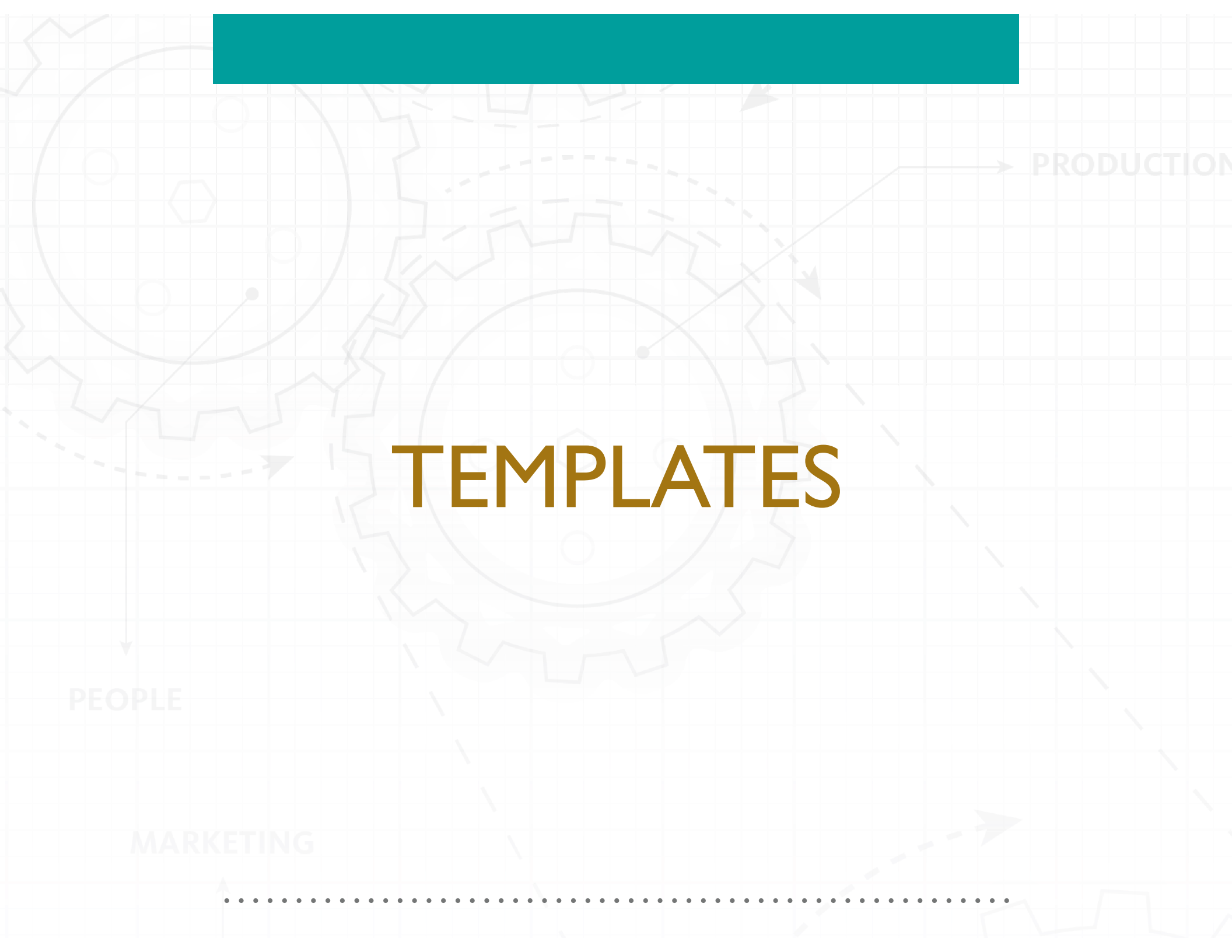
12. New client engagement
13. Pre-engagement glide path
14. Post engagement (15, 30, 60, 90, 180 days etc.)
15. Accounting for time, tasks and value
16. Preparing bills
17. Accepting Payment
18. Conflict checking and documentation

19. Declining a new case or engagement
20. Monthly book keeping
21. Computer file organization scheme
22. Computer back-up
23. Monthly maintenance meetings: policies and procedures
24. Montly Newsletter

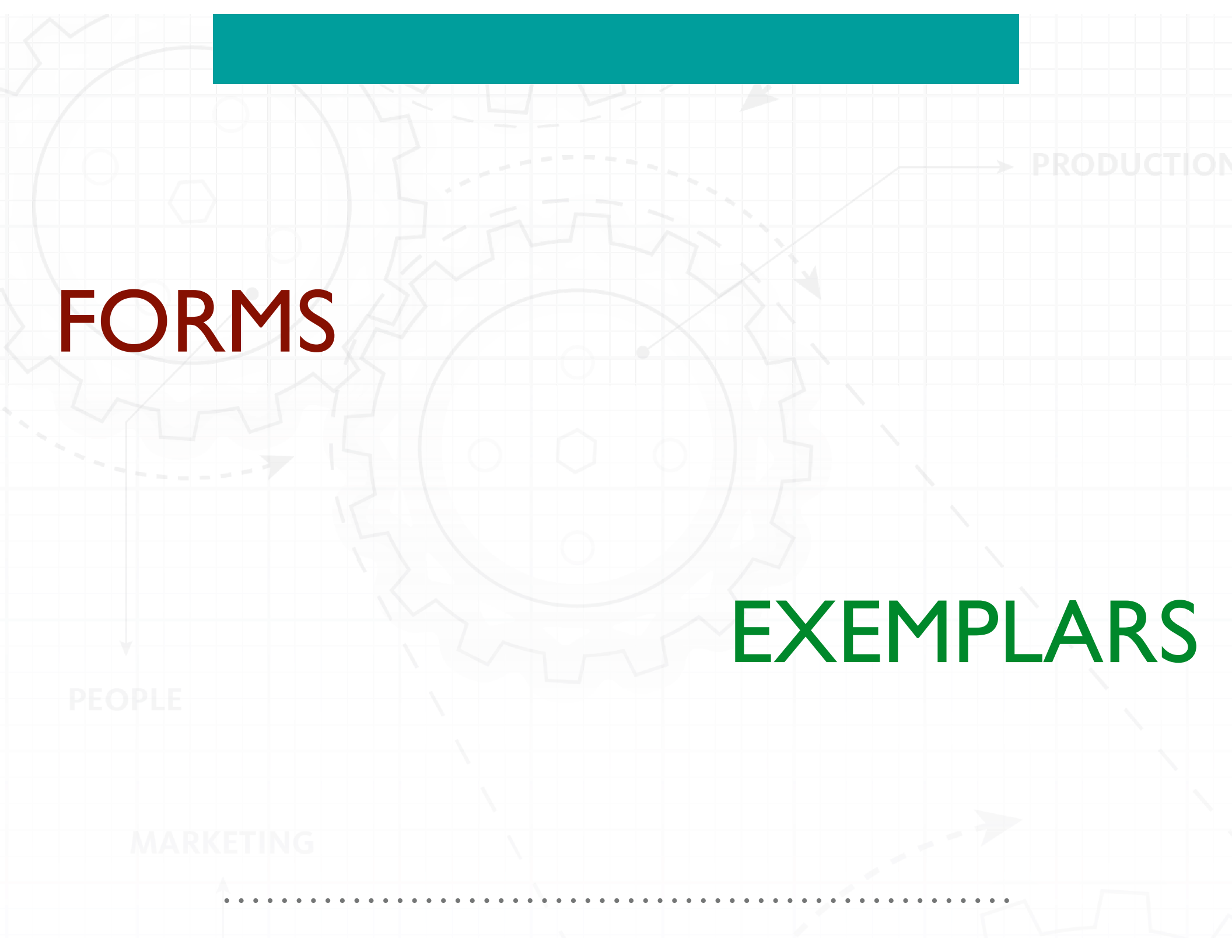
24 Key Procedures

CHECKLISTS



The background features a light gray grid with faint, stylized illustrations of interlocking gears. Dashed arrows indicate a clockwise flow between the gears. The words 'PEOPLE', 'MARKETING', and 'PRODUCTION' are positioned around the gears, connected by these dashed lines. A solid teal rectangular bar is located at the top of the image.

TEMPLATES



FORMS

The background features a light gray grid with several large, faint gears. Dashed arrows indicate a clockwise flow from the top-left gear to the top-right, then to the bottom-right, then to the bottom-left, and finally back to the top-left. Solid arrows point from the top-left gear towards the word 'PEOPLE' and from the top-right gear towards the word 'PRODUCTION'. A dotted arrow points from the bottom-left gear towards the word 'MARKETING'.

EXEMPLARS

PEOPLE

MARKETING

PRODUCTION

Policies

Procedures

Checklists

Templates

Forms

+

Exemplars

Systems

CREATE SYSTEMS

MARKETING – How do we find prospective clients who want to solve this problem / seize this opportunity and send them to the right place/right time?

SALES – How do we provide information to the prospects that our sales systems has delivered, so that they can make an informed decision. (And how do we evaluate them?)

FACTORY – How do we deliver on the promises we have sold?

PEOPLE – How do we recruit, hire, train, reward and retain the talent needed to deliver a delightful customer experience?

PHYSICAL PLANT – How do we provide the tools needed by the People to operate the Factory?

MONEY/METRICS –

What are the expected inputs?

What are the expected outcomes? What are the actual inputs?

What are the actual outcomes? What decisions do these dictate?

YOU!

What knowledge do you need?

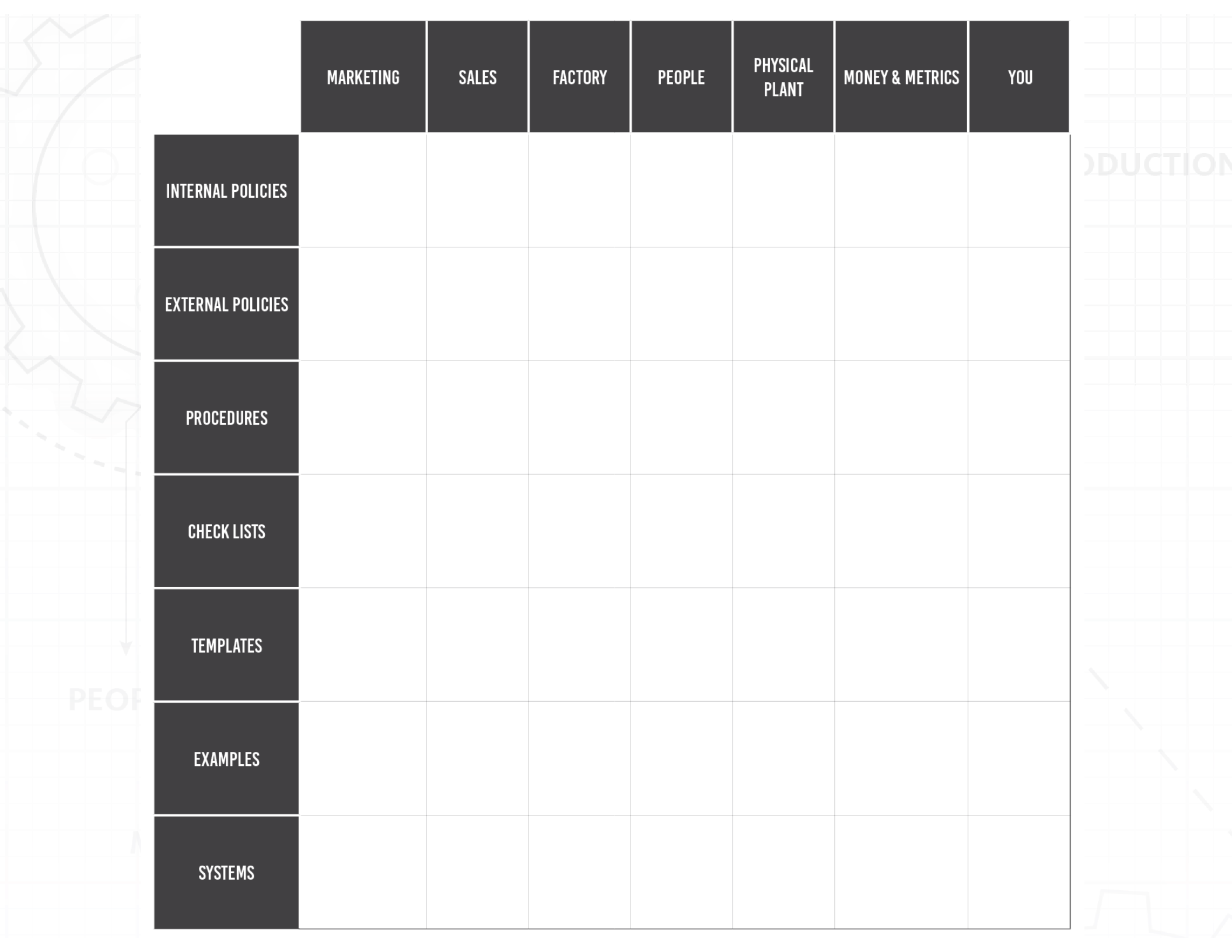
What skills do you need?

What do you believe?

CREATE SYSTEMS

- What?
- How?
- Why?





	MARKETING	SALES	FACTORY	PEOPLE	PHYSICAL PLANT	MONEY & METRICS	YOU
INTERNAL POLICIES							
EXTERNAL POLICIES							
PROCEDURES							
CHECK LISTS							
TEMPLATES							
EXAMPLES							
SYSTEMS							

CREATE SYSTEMS

**What systems am I building
for my clients?**

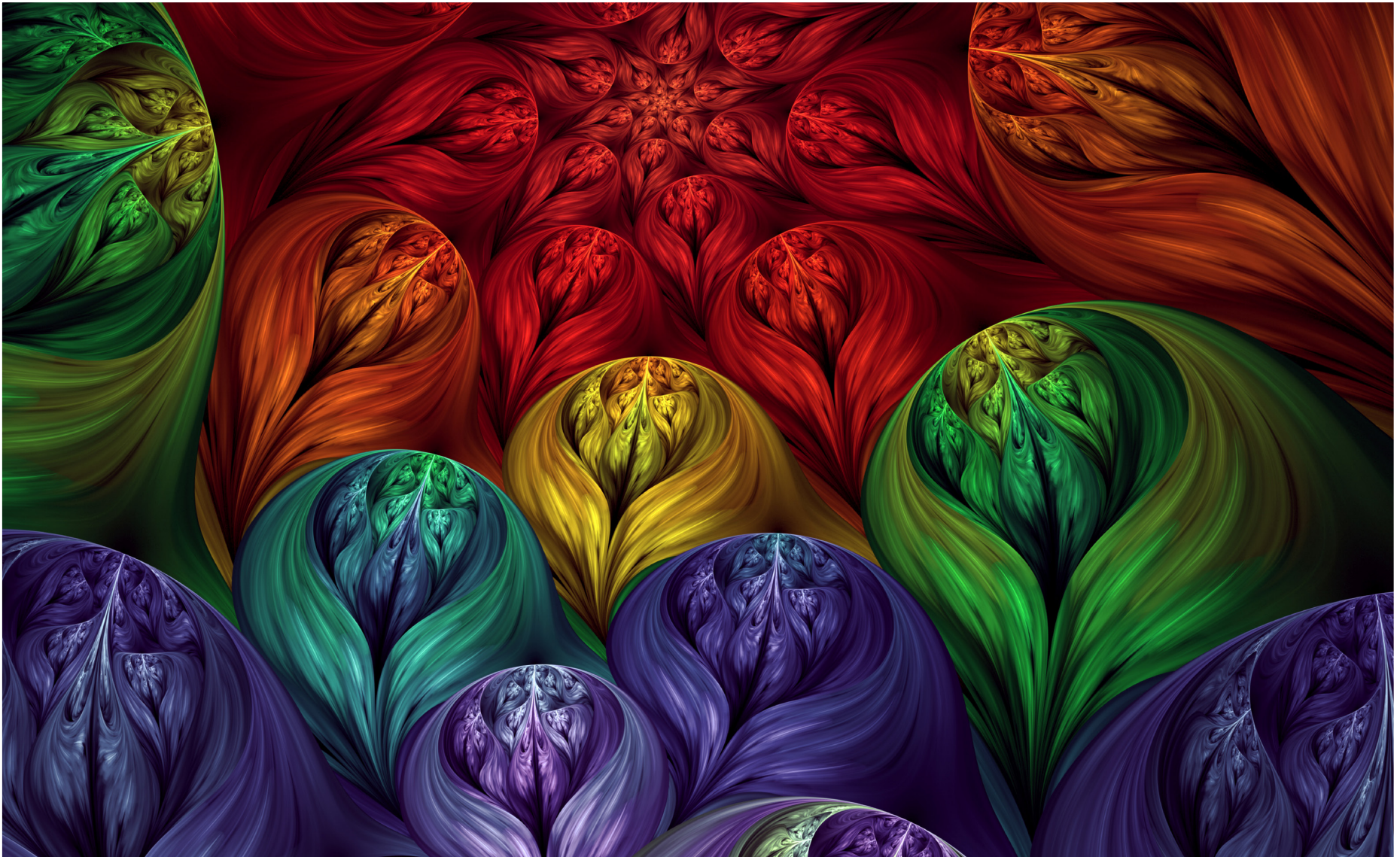
**What systems am I building
for my business?**

THE SUPER-SYSTEM

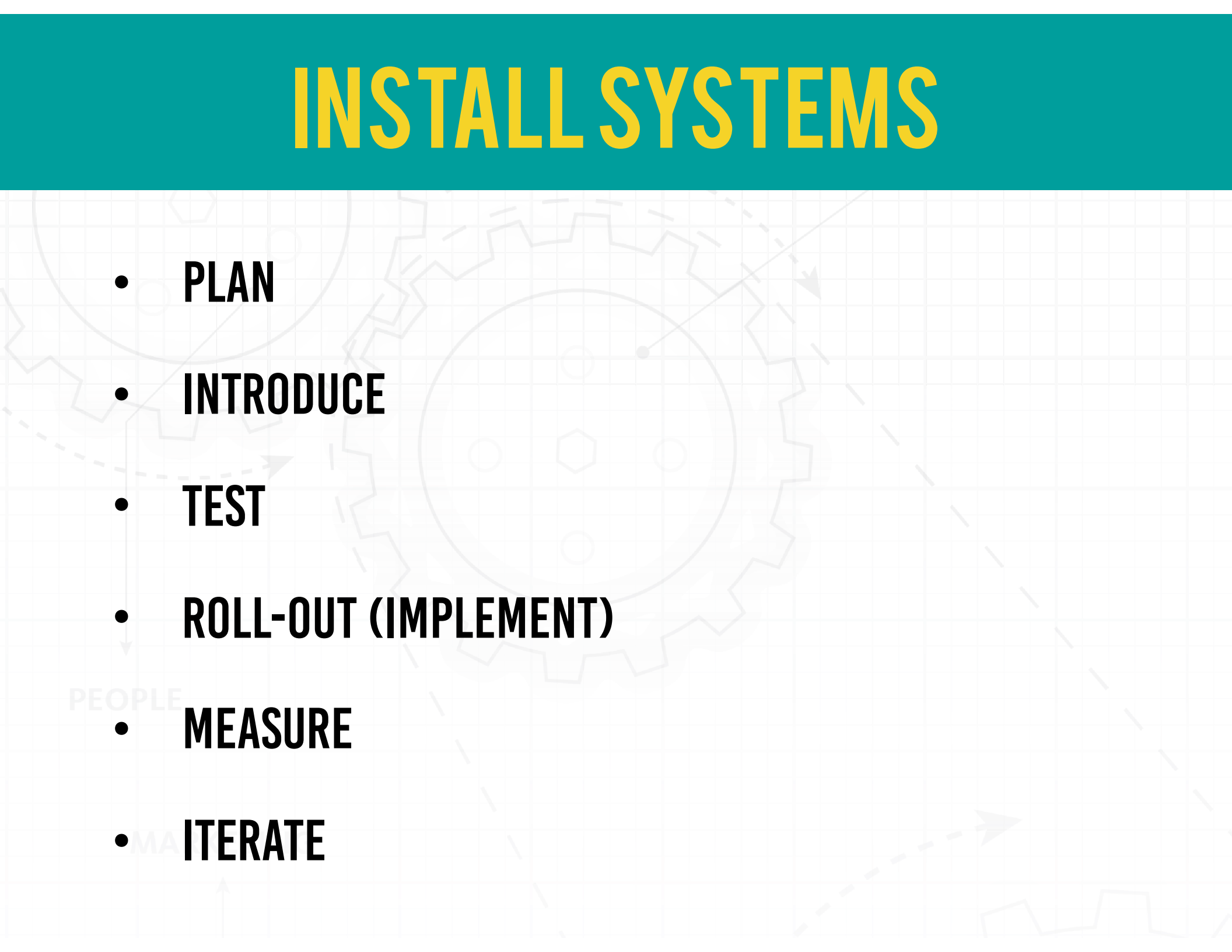
7 Main Systems in Your Business



SUB-SUB-SYSTEMS



INSTALL SYSTEMS

- **PLAN**
 - **INTRODUCE**
 - **TEST**
 - **ROLL-OUT (IMPLEMENT)**
 - **MEASURE**
 - **ITERATE**
- 
- The background features a large, faint gear with a dashed arrow pointing clockwise, suggesting a continuous cycle or process. The gear is centered on the slide, and the arrow starts near the top right and ends near the bottom right. The overall design is clean and professional, with a teal header and a light gray grid background.



PLAN

**1. STRATEGIZE YOUR
END GOAL**

**2. DETERMINE WHAT STEPS OR
SEQUENCE TO GET THERE**

**3. IDENTIFY WHAT TOOLS
AND PEOPLE ARE
NECESSARY TO BUILD IT**

**4. COMMENCE DRAFTING
YOUR SYSTEM**

MVP

LESS = Insufficient Value for Adoption

MORE = Increased Cost of Failure!

PEOPLE

MARKETING

MVP

Testing and Learning $\neq$ Asking



PEOPLE

MARKETING

INTRODUCE THE BENEFITS

- Why this makes their life better.
- Why it makes their job easier.
- Why it makes their job more enjoyable.
- Why it makes their job more predictable.
- Why it makes their job more stable.
- Why it makes their job more productive.
- Why it makes their job more rewarding.

ITERATION: FAILURE IS GOOD!



→ PRODUCTION

PEOPLE

“I have not failed. I’ve just found
10,000 ways that won’t work.”

Thomas A. Edison

THE PIVOT



FACEMASH - FACEBOOK

ODEO - TWITTER

SESSION 7

GETTING OVER YOURSELF

Getting Things Done By Getting Out of The Way





168

Problem:

We Find that We Are Working for Our Firm



MARKETING

- **TIME IS FINITE**

- **WE GET TO CHOOSE HOW TO SPEND IT:**

- **LOW VALUE** OR
- **HIGH VALUE**



THIS CHOICE IS THE CAUSE...

WE BECOME BUSY WHEN WE SHOULD BE PRODUCTIVE



PEOPLE

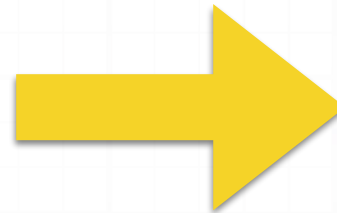
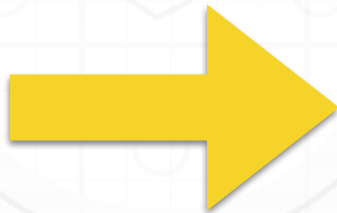
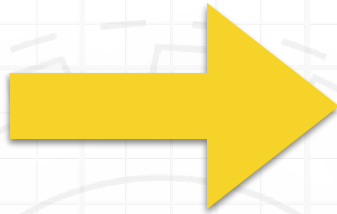
MARKETING

CATCH-22

I DON'T HAVE TIME TO DELEGATE

The background features a light gray grid. Two large, interlocking gears are visible. The left gear is solid gray, while the right gear is dashed gray. Various business-related terms are scattered around: 'PRODUCTION' is at the top right, 'PEOPLE' is on the left, and 'MARKETING' is at the bottom left. Dashed arrows indicate a clockwise flow from 'PEOPLE' to 'PRODUCTION' to 'MARKETING' and back to 'PEOPLE'. A dotted line with an arrow points upwards from the bottom left towards the center.

OUR RELATIONSHIP WITH TIME

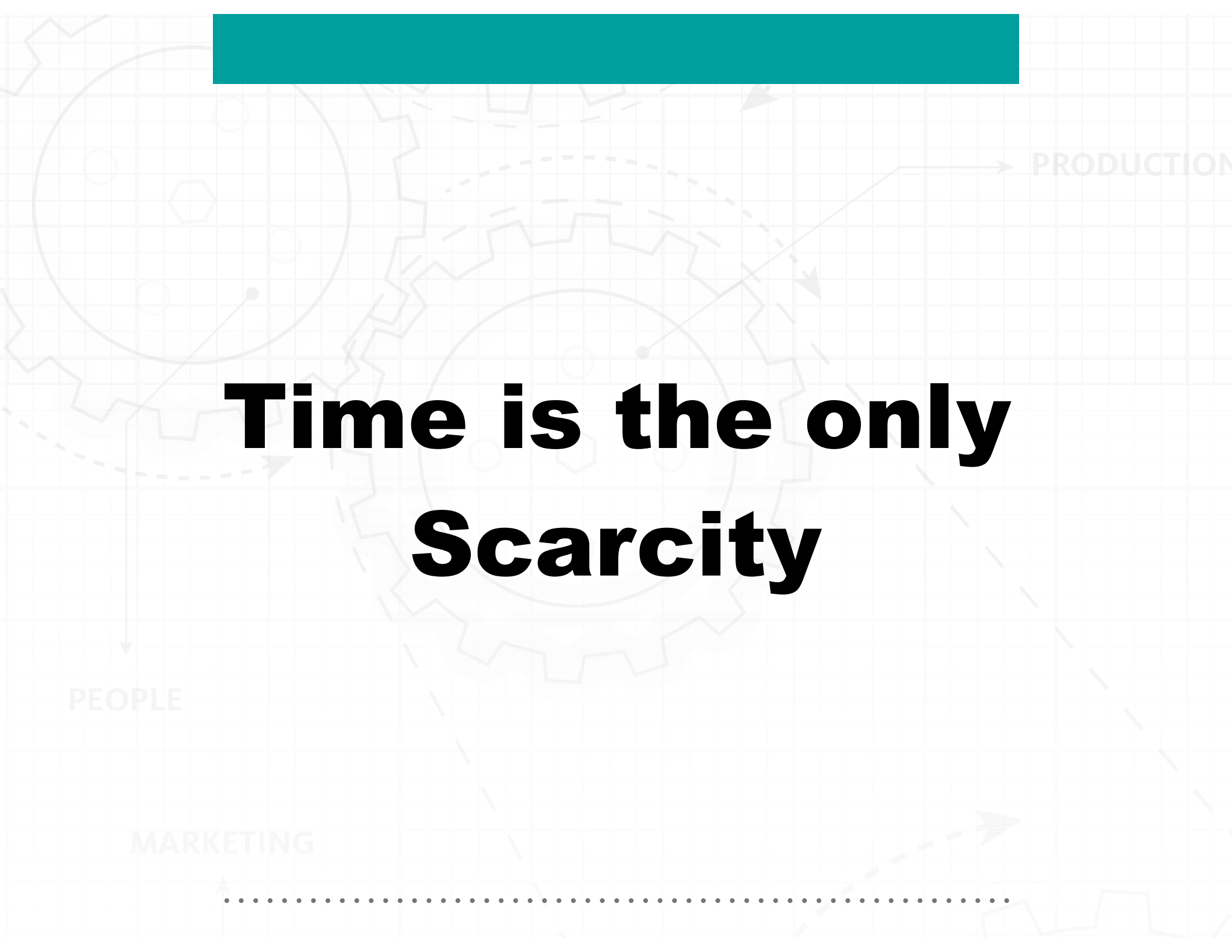


PRODUCTION

PEOPLE

MARKETING





Time is the only Scarcity

Entrepreneurs **Choose**
How to **Invest**
Their Most Precious Resource

The Tasks in a Law Firm



High Value Legal

- Marketing / Client Development
- Maintaining Client Relationships
- Strategic Planning (Firm and Cases)
- Strategic Management of the Team
- High(est) level legal skills



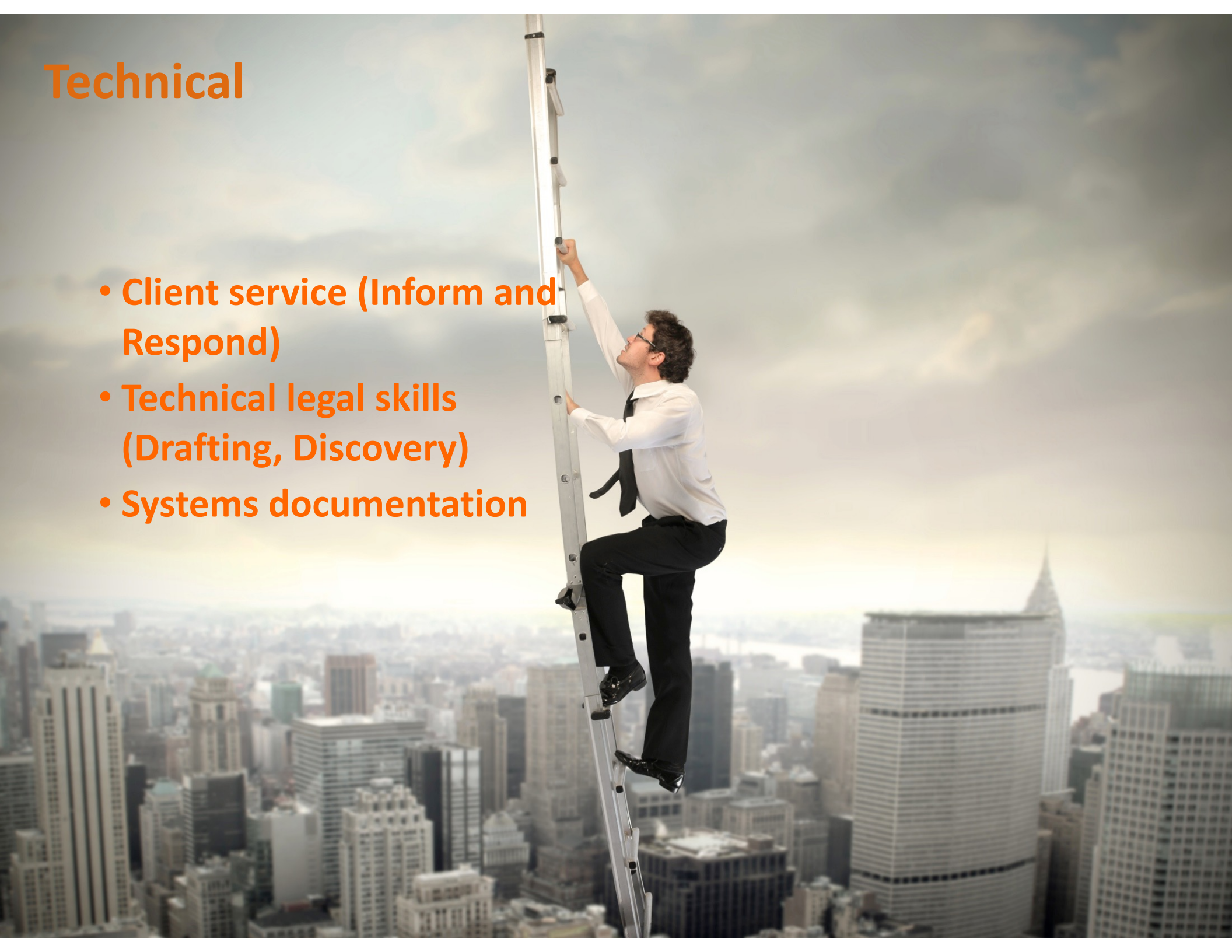
Other Legal

- High level legal skills
- Middle level legal skills
- Client service (Inform and Respond)
- Technical legal skills (Drafting, Discovery)



Technical

- Client service (Inform and Respond)
- Technical legal skills (Drafting, Discovery)
- Systems documentation



Administrative

- Systems documentation
- Office Management
- Mail and email
- Attorney Desk and Office Organization

- Telephone answering
- Supplies
- Clerical
- Bookkeeping



(also known by many as “the stuff I spend a lot of time doing...”)

Hierarchy of Tasks – Move up the Ladder

- Marketing/Client Development
- Client Relationships
- Strategic Planning
- Strategic Management
- High level legal skills
- Middle level legal skills
- Client service
- Technical legal skills
- Systems documentation

- Office Management
- Mail and email
- Attorney Desk and Office Organization
- Telephone answering
- Supplies
- Clerical
- Bookkeeping

Paralegal Associate(s)

Some Help



Where you want to Be!

- Marketing/Client Development
- Client Relationships
- Strategic Planning
- Strategic Management
- *(Highest Level Legal Skills)*
... If you want to

That's It!!!



**WHEN YOU ANSWER
THE PHONE**





WHY ARE LAWYERS SO BAD AT DELEGATION?

Why are Lawyers so Bad at Delegation?



DELEGATING THE RIGHT WAY

- YOU CAN ONLY DELEGATE AUTHORITY
- STAFF MUST TAKE RESPONSIBILITY
- WHICH MEANS YOU MUST TRUST (BUT VERIFY)



DELEGATION: NUTS AND BOLTS

- **WHAT IS THE TASK/PROJECT?**
- **WHY ARE WE DOING IT?**
- **WHY HAVE I CHOSEN YOU?**
- **WHAT IS THE PLAN?**
 - **DEADLINES**
 - **REPORTS**
 - **WHO DOES WHAT BY WHEN?**

.....

TOOLS FOR DELEGATION

- DOCUMENT THE JOBS
- (DELEGATE THE JOB OF DOCUMENTING IF NECESSARY)
- FOLLOW TO THE LETTER
- DOCUMENT YOUR JOBS TOO (EVEN IF YOU HAVE TO DELEGATE THAT, TOO)
- TWO DOCUMENTS RESULT
 - FIRM POLICIES
 - PROCEDURES

TOOLS FOR DELEGATION

PROJECT PLANNING & DELEGATION WORKSHEET

PROJECT:	
PURPOSE: What should be accomplished?	How will we know if this project was a success? 1. _____ _____ 2. _____ _____ 3. _____ _____
IMPACT: How will the completion, quality, or abandonment impact the company?	How will Success be measured along the way? A. _____ _____ B. _____ _____ C. _____ _____
IDEAL OUTCOME: What does the completed project look like?	Budget \$ _____ Proposed Spend: \$ _____ Projected Revenue Short Term: \$ _____ Long Term: \$ _____ Projected ROI: \$ _____ Other: \$ _____
Best Result if you take action:	
Worst Result if you don't take action:	

The background features a light gray grid. Overlaid on the grid are several faint, stylized elements: two interlocking gears, a dashed line with arrows forming a circular path, and three business-related terms: 'PRODUCTION' at the top right, 'PEOPLE' at the bottom left, and 'MARKETING' at the bottom left. The main text is prominently displayed in the upper left quadrant.

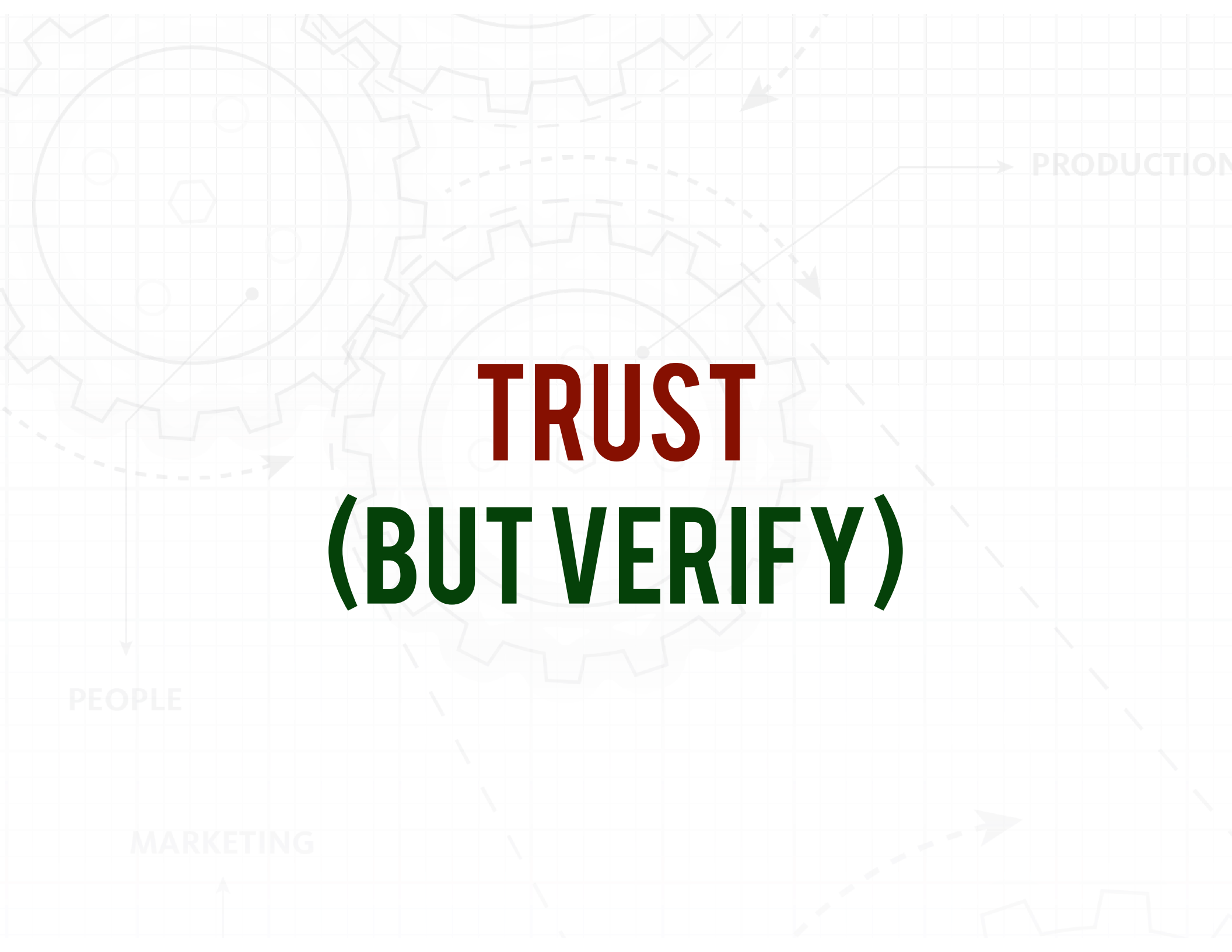
DELEGATION IS NOT:

ABDICATION

MANAGING THE TEAM TO SUCCESS

CASE & TASK MANAGER

File Name	TM Matter #	Task- Next Step Needed	Who	ETC	Priority	Due
Sample Case	06-06732	Get Discovery Schedule commitment	CTA	0.3	A	5/21/14
Sample Case	08-08885	Review Lease / Review PUD work	CTA	0.3	B	5/21/14
Sample Case	08-09213	Counter offer to Adam re: no land	CTA	0.3	B	5/21/14
Sample Case	07-07909	FU with Lane in letter/ TNW-Wait on OC's SA comments / Submit Rule Nisi after 7/11	CTA	0.3	C	5/21/14
Sample Case		Correct party names on subpoena	TNW	0.4	A	5/22/14
Sample Case	06-07072	Get new court date (leave letter)/ Contact Linda to get a witness that can testify that she has a reputation in the community for sobriety and responsibility to	TNW	0.5	A	5/22/14
Sample Case	08-08890	Schedule depositions	TNW	0.5	B	5/22/14
Sample Case	08-09204	Complete CSW / Get details for proposed SA / Draft SA	TNW	2.0	B	5/22/14
Sample Case		Call client re: child/balance update / Do proposed SA / Get court date- Final?	TNW	0.5	C	5/22/14
Sample Case	06-06732	Get Discovery Schedule commitment	CTA	0.3	A	5/23/14
Sample Case	08-08885	Review Lease / Review PUD work	CTA	0.3	A	5/23/14
Sample Case	08-09213	Counter offer to Adam re: no land	CTA	0.3	B	5/23/14
Sample Case	08-09244	Meet with client/ CTA - Review Answer/ TNW- draft FA & lis pend./ set up appt. with Quick	CTA	0.2	B	5/23/14



The background features a light gray grid with faint, stylized illustrations of interlocking gears and dashed arrows indicating a clockwise flow. Three labels are positioned around the central text: 'PRODUCTION' at the top right, 'PEOPLE' at the bottom left, and 'MARKETING' at the bottom left, below 'PEOPLE'.

TRUST **(BUT VERIFY)**

EXERCISE

The background features a light gray grid with several large, faint gears. Dashed arrows indicate a clockwise flow between the gears. The word 'PRODUCTION' is at the top right, 'PEOPLE' is on the left, and 'MARKETING' is at the bottom left. A dotted line with an arrow points upwards from the bottom center.

WHAT SHOULD YOU DO

WHAT SHOULD YOU NOT BE DOING



**YOU ARE NOT THE BEST ... AT ALMOST
ANYTHING!**

SO STOP ACTING LIKE IT.

PEOPLE

MARKETING

.....

ALLOCATE YOUR TIME BASED ON YOUR PRIORITIES

Christopher Anderson Weekly Time Plan - Office Hours

	Monday	Tuesday	Wednesday	Thursday	Friday	
8:30 AM	Uninterruptible Production	Attorney Meeting	Uninterruptible Production	Uninterruptible Production	Uninterruptible Production	
9:00 AM						
9:30 AM						
10:00 AM	Work ON Business	Administrative Time	Work ON Business	Client Meetings / Open Door Production		
10:30 AM						
11:00 AM						
11:30 AM	Team Meeting	Team Meeting	Team Meeting	Team Meeting	Team Meeting	
12:00 PM						
12:30 PM	Lunch	Lunch	Lunch	Lunch	Lunch	
1:00 PM						
1:30 PM	Return Calls/Emails	Return Calls/Emails	Return Calls/Emails	Return Calls/Emails	Return Calls/Emails	
2:00 PM	Client Meetings / Open Door Production			Work ON Business	Swamp Out	
2:30 PM						
3:00 PM						Client Meetings / Open Door Production
3:30 PM						
4:00 PM	Homework		Homework	Open Door Production	Open Door Production	
4:30 PM						
5:00 PM	Return Calls/Emails				Annex, etc.	
5:30 PM						

PEOPLE

MARKETING



Schedule with President Obama Monday, July 7, 2014 Washington, DC

Weather:

Washington, DC

94/73, Partly Cloudy

Time Zone:

Washington, DC

Eastern Time Zone

Protective Pool Activation:

Deputy Dir of Press Advance
Phone Number for Staffer
BO Contact

Name of staffer
Name of staffer

Phone Number for Staffer
Phone Number for Staffer

Staff:

Body Person
Trip Director
Dep. Dir. Oval Office Operations
POTUS Personal Secretary

Name of staffer
Name of staffer
Name of staffer
Name of staffer

Phone Number for Staffer
Phone Number for Staffer
Phone Number for Staffer
Phone Number for Staffer

Attire:

Business

Scheduling Contact

Name of staffer

Phone Number for Staffer

Emergency Scheduling Contact

Name of staffer

Phone Number for Staffer

9:15-9:25 am

REMARKS REVIEW

Location: Oval Office
Staff: Speechwriter
PRESS: CLOSED

9:25-9:30 am

MOVE TO SITE OF REMARKS

9:30-10:00 am

IMMIGRATION EVENT WITH VPOTUS

Location: Site of Remarks
Call Time: 9:15 am
Site: Name of staffer
Set-up: YOU speak from a podium flanked by VPOTUS and immigration advisers.
Details of audience, size and make-up
Sound/Podium: Podium with wired mic
Remarks: Prepared
Teleprompter: YES
PRESS: POOL

Format:

- VPOTUS and immigration advisers are pre-set
- YOU proceed to podium
- YOU give remarks
- YOU depart

10:00-10:05 am

MOVE TO SITUATION ROOM

10:25-10:55 am

FOREIGN LEADER CALLS

Location: Situation Room
Staff: Name of national security aide
PRESS: CLOSED

10:55-11:25 am

PDB WITH VPOTUS

Location: Oval Office
PRESS: CLOSED

11:40-11:55 am

MEETING WITH SENIOR ADVISORS

Location: Oval Office
PRESS: CLOSED

1:00-1:30 pm

LUNCH WITH VPOTUS

Location: Oval Office
PRESS: CLOSED

1:30-1:45 pm

DROP-BY COUNSEL'S OFFICE STAFF MEETING

Location: Roosevelt Room
Staff: Name of staff
Set-up: Seated meeting.
PRESS: CLOSED

2:30-2:45 pm

MEETING WITH CABINET SECRETARY

Location: Oval Office
Staff: Name of staff
PRESS: CLOSED

2:45-3:00 pm

DROP BY // PHOTO WITH SPORTS CHAMPIONS

Location: Blue Room
Attendees: Total number (number front office, number players)
Staff: Name of staff
Set-up: Standing greet with staff photographer
present for group photos
PRESS: CLOSED

6:15-6:30 pm

DAILY WRAP WITH CHIEF OF STAFF

Location: Oval Office
PRESS: CLOSED

RON

WASHINGTON DC

WEALTH CHOICES

**DECREASE THE TIME YOU SPEND DOING THINGS
JUST TO “DO THINGS”**

**INCREASE THE TIME YOU SPEND
CREATING SYSTEMS THAT DO THINGS
(FOR YOU AND FOR OTHERS.)**

PEOPLE

MARKETING



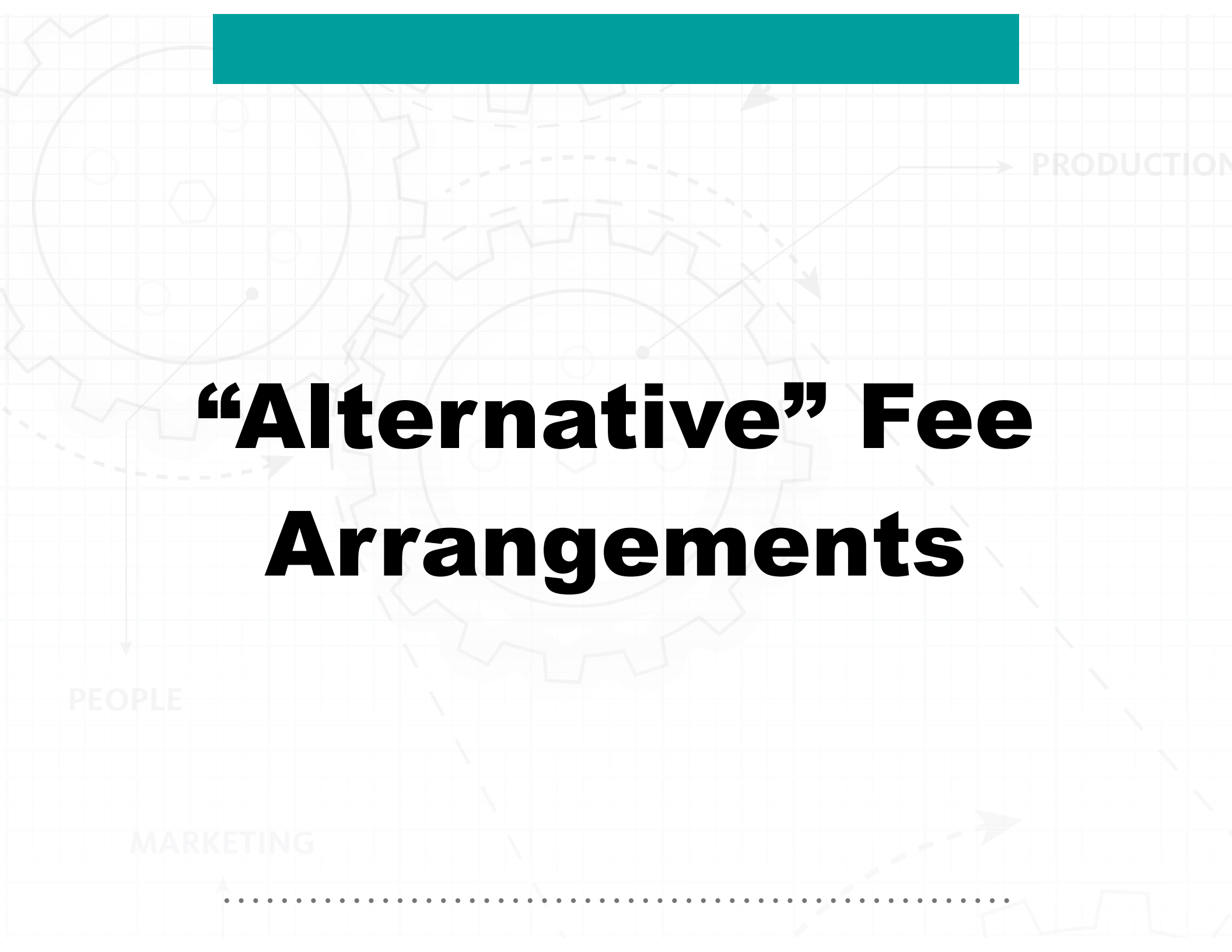
NO HIDING OUT IN THE FACTORY!

The background features a light gray grid with faint, stylized illustrations of interlocking gears. Dashed lines with arrows indicate a clockwise flow from the top right towards the bottom left, passing through the central text. The words 'PRODUCTION', 'PEOPLE', and 'MARKETING' are faintly visible in the background, corresponding to the flow path.

PEOPLE

MARKETING

.....



“Alternative” Fee Arrangements

**Where Else Can you
Gain Time?**





The Effects

WHY DO THEY WORK HERE?

- Everyone you hire comes to work and does their job for _____ reasons.
- A real leader is always _____ whenever anyone on the team earns more money.
- Be clear about why to hire, train and manage a person in the first place. It's so they can help you make a _____ or make your life _____;
Preferably Both!

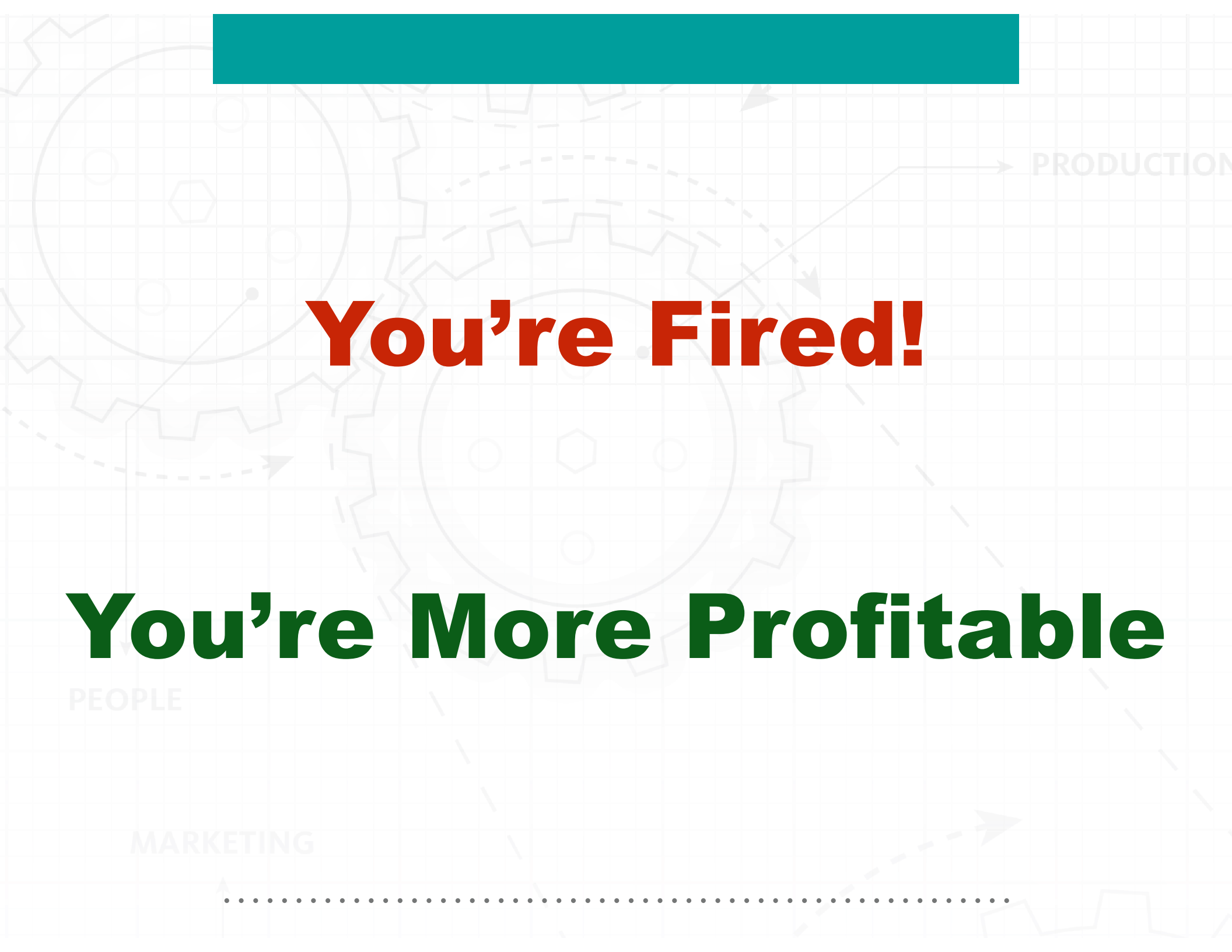
THE JOBS IN A LAW FIRM

Exercise:

JOB IN FIRM	NAME OF (ALL) PEOPLE DOING JOB	POINTS	MULTIPLIER	TOTAL
Receptionist				
Secretary/Assistant				
Book Keeper				
Office Manager				
Paralegal				
Associate (Grinder)				
Sr. Associate (Minder)				
Rainmaker (Finder)				
Law Firm Administrator				
Marketing Director				
Sales Director				
Client Relations				
COO				
CFO				
CEO				
Owner				

PEOPLE

MARKETING



You're Fired!

You're More Profitable

THE TECHNICIAN TRAP

"The real tragedy is that when the technician falls prey to the Fatal Assumption, the business that was supposed to free him from the limitations of working for somebody else actually enslaves him."

Michael E. Gerber. The E-Myth Revisited

THE
5
LEVELS
OF
LEADERSHIP

5

Pinnacle

— RESPECT —

People follow because of who you are
and what you represent.



4

People Development

— REPRODUCTION —

People follow because of what you have done for them.



3

Production

— RESULTS —

People follow because of what you have done for the organization.



2

Permission

— RELATIONSHIPS —

People follow you because they want to.



1

Position

— RIGHTS —

People follow you because they have to.

PEOPLE

MARKET

→ PRODUCTION

SESSION 8

PUTTING IT ALL TOGETHER

Stop guessing and start planning





PEOPLE

MARKETING

PRODUCTION

What Happens If Your “Factory” **Cannot Keep-Up** With Marketing & Sales?

.....

SYMPTOMS

- ❑ The People are overworked
 - ❑ Workproduct is backlogged
 - ❑ Client complaints about slow delivery
 - ❑ Client complaints about un-met commitments
 - ❑ A “Silent Vote” by clients & referral sources
 - ❑ Lost profits due to cash ow-timing issues
 - ❑ Missed opportunities to pursue growth
 - ❑ Owner feeling trapped by success
 - ❑ Too many late nights instead of being home with family
- ❑
 - ❑ Feeling distant and not fully-present when at home
 - ❑ Fear of taking a “real” vacation
 - ❑ Fear of waking up one day and kids are grown
 - ❑ Low profits for clients
 - ❑ Low profits for staff
 - ❑ Low profits for owner of the firm
 - ❑ Wasting too much nding les
 - ❑ Bar grievances/Malpractice
 - ❑ More work for the firm = more work for YOU!

.....

INVENTORY YOUR SKU'S

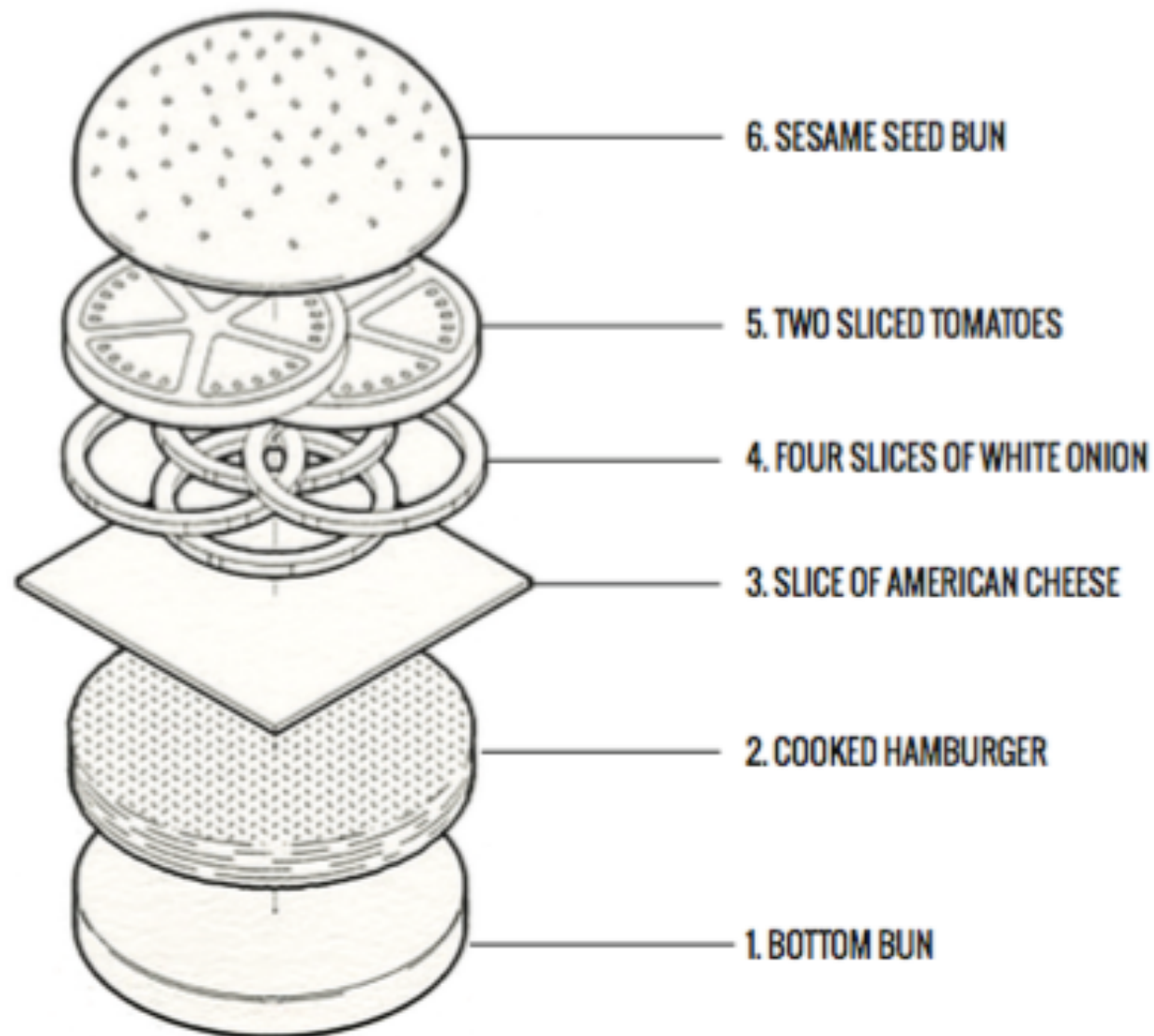
	DELIVERABLE	PRICE	CO(G/S)S	PROFIT (LOSS)
EX:	DUI - Low Net Worth - No Breathalyzer	\$3000	\$1500	\$1500
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

→ PRODUCTION

PEOPLE

MARKET

WHERE ARE THE ASSEMBLY INSTRUCTIONS FOR YOUR LAW FIRM?



DUCTION

PEOP

LET'S BUILD A SKU

SIMPLE DIVORCE

Activity	Sr. Associate Hours \$75	Jr. Associate Hours \$50	Paralegal Hours \$40	Admin Hours \$15	Amount
Initial Intake	0.2	0.5	1.0	0.5	\$87.50
Open File				1.0	\$15.00
Review with client the needed documents		0.5			\$25.00
Follow up to get documents			1.0	2.0	\$70.00
File review		2.0	1.0		\$140.00
Client Consultations		2.0	3.0	1.0	\$235.00
Pleadings		1.0	1.0		\$90.00
Motions		4.0	3.0		\$320.00
Preliminary Hearing	1.0	8.0	20.0		\$1,275.00
Motions Hearings	0.5	4.0	10.0		\$637.50
Final Hearing	8.0	24.0	40.0	40.0	\$4,000.00
Close File				1.0	\$15.00
TOTAL	9.7	46	80	45.5	\$6,910.00

SESSION 9

CALENDARING YOUR PROFIT

Convert your time into wealth





168



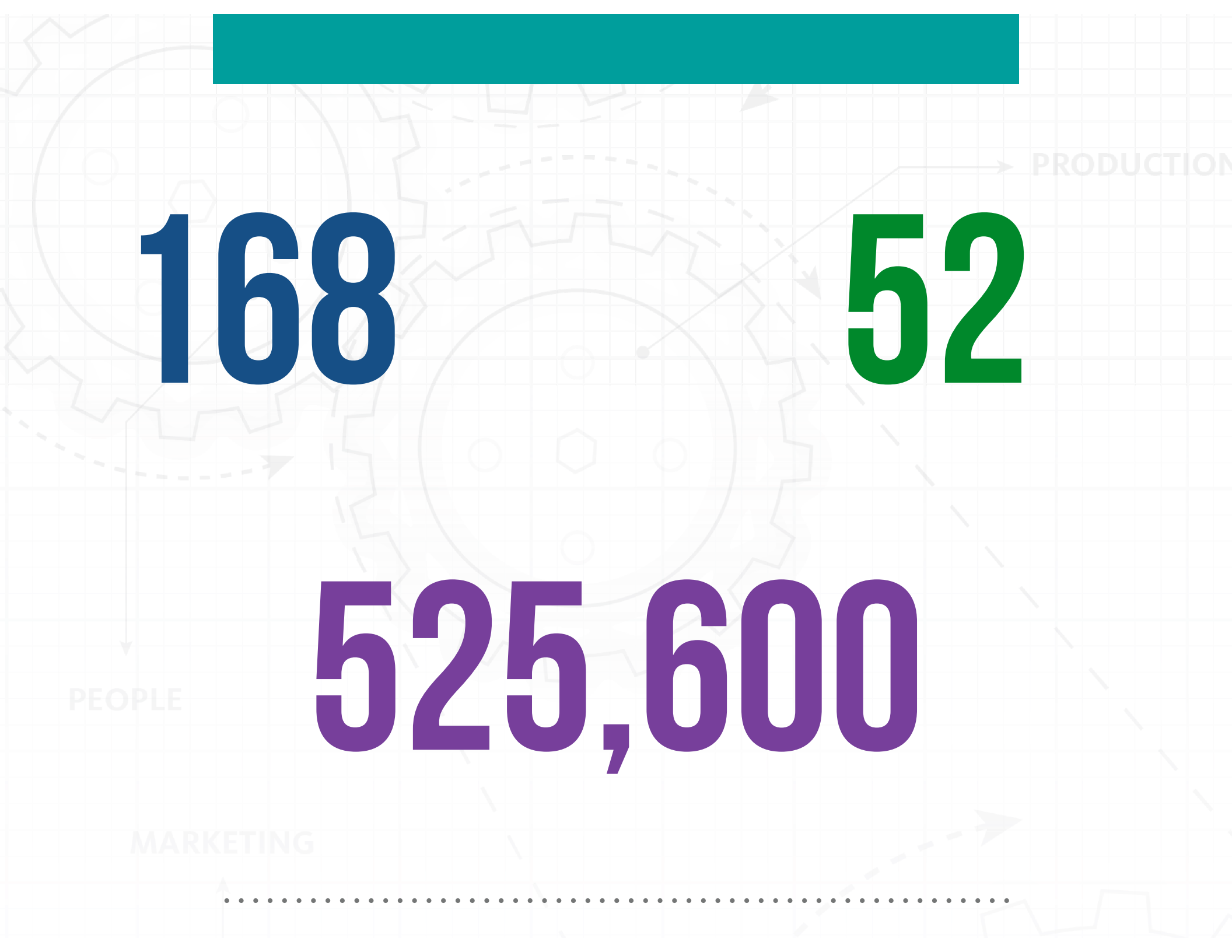
168

52

PEOPLE

MARKETING

PRODUCTION



168

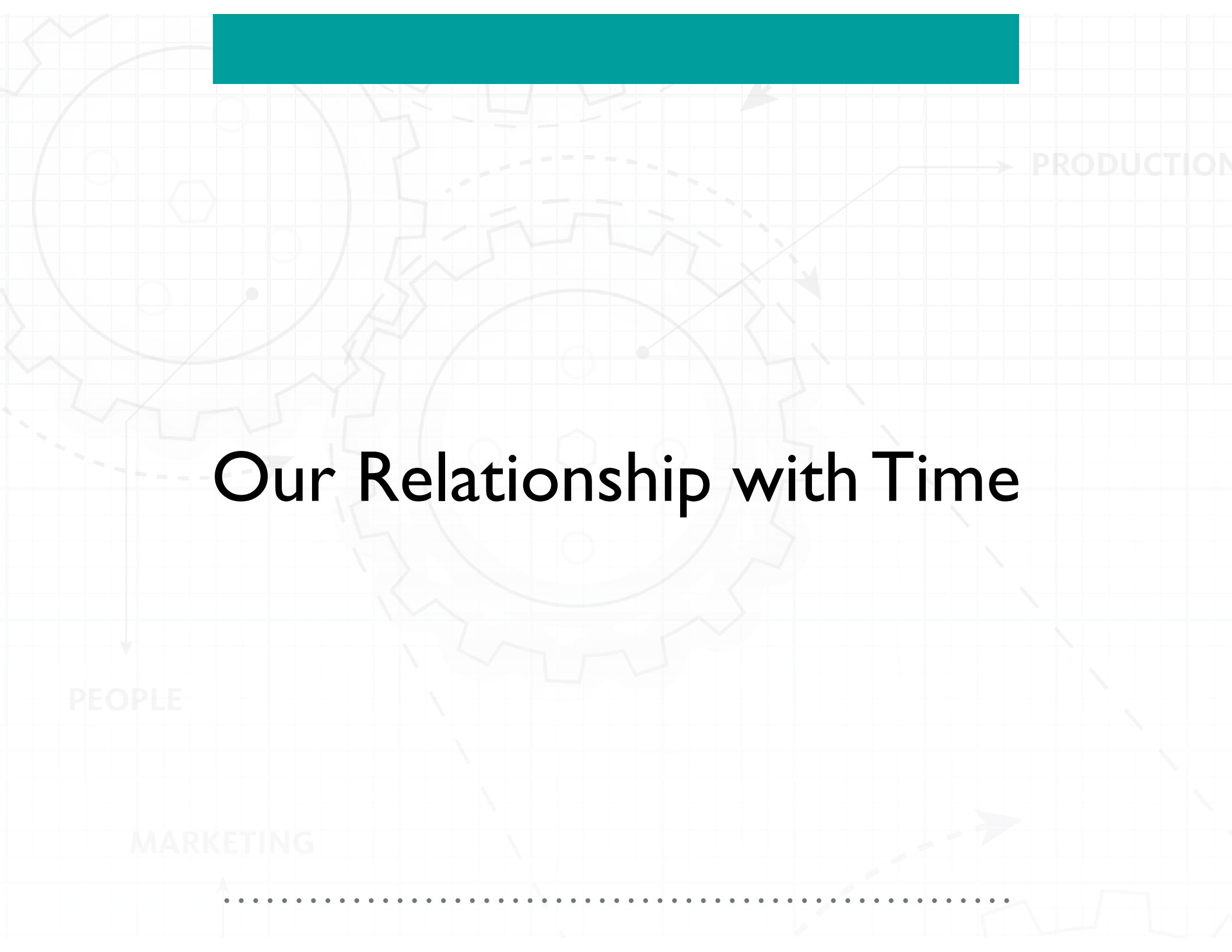
52

525,600

PEOPLE

MARKETING

PRODUCTION

The background features a light gray grid. Overlaid on the grid are several faint, stylized elements: two large interlocking gears, one on the left and one in the center. Dashed lines with arrows form a circular path around the central gear. A solid line with an arrow points from the left towards the word 'PRODUCTION' on the right. Another dashed line with an arrow points from the bottom left towards the bottom right. The words 'PEOPLE' and 'MARKETING' are positioned on the left side, with 'PEOPLE' above 'MARKETING'.

Our Relationship with Time

PEOPLE

MARKETING

PRODUCTION

WEALTH CHOICES

Moves You Forward.

Hire; Delegate to Staff

Prepares you to move Forward.

Policies and procedures; training

Treading Water.

Doing it yourself

Moves You Backward.

Scrub own toilet; talking to others about how bad it is; abusing staff; not training staff; taking and not giving



JANUARY						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	
NOTES:						

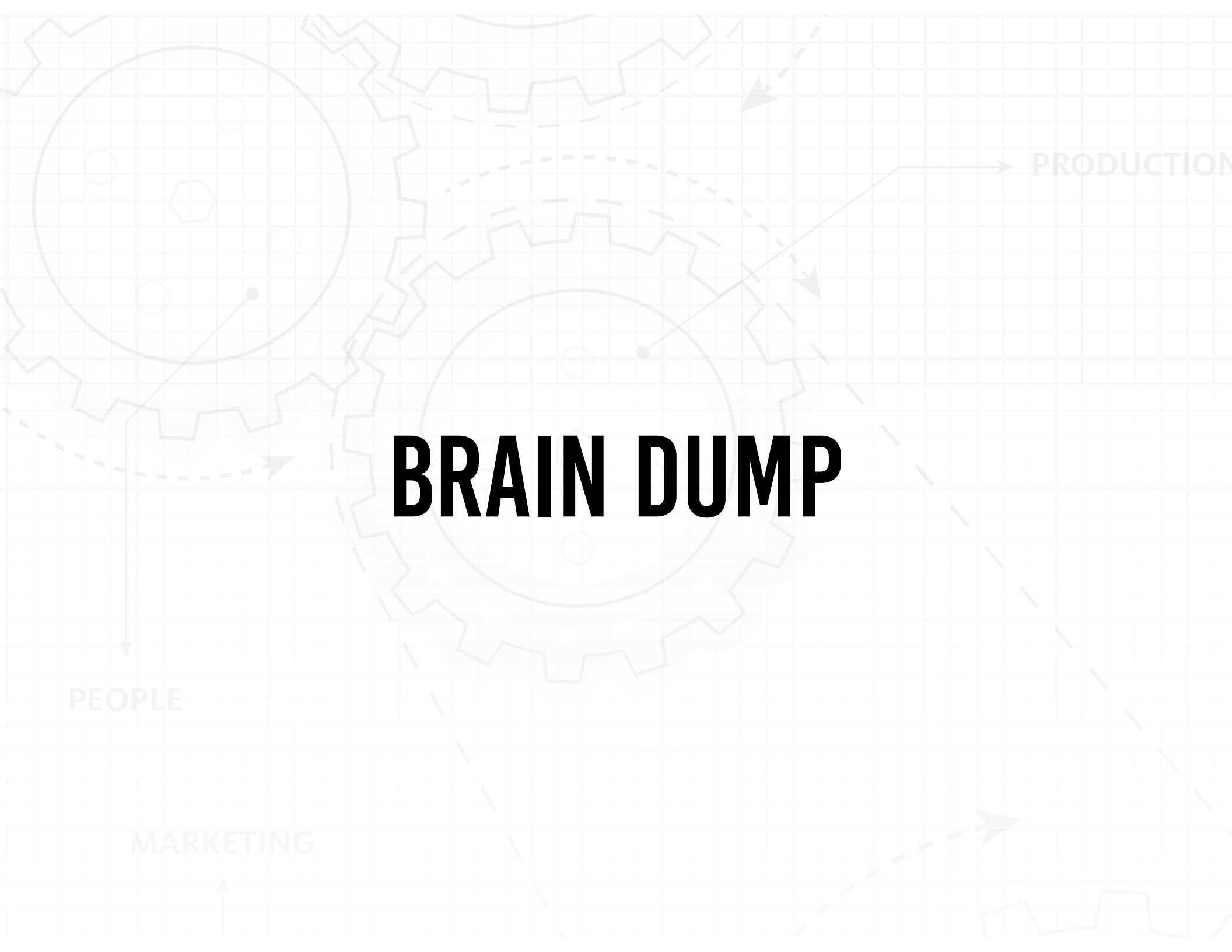
VS.



PEOPLE

MARKETING





BRAIN DUMP

PEOPLE

MARKETING

PRODUCTION

BRAIN DUMP

- **GET MONEY**
- **KEEP MONEY**
- **KEEP SANITY**
- **WANT TO DO**

PEOPLE

MARKETING

BUILD THE PROJECT PLANS

- **WHAT IS THE DESIRED OUTCOME I SEEK?**
- **WHAT TOOLS DO I NEED TO ACCOMPLISH THE OUTCOME?**
- **WHAT ENVIRONMENT WILL HELP ME REACH THE OUTCOME?**
- **HOW MANY DIFFERENT STEPS ARE REQUIRED**
- **HOW MUCH CLOCK TIME WILL NEED FOR EACH STEP**
- **HOW CAN I STAGE THE STEPS ON THE CALENDAR?**

PLANNING YOUR PROFITS

1. **BOULDERS**
2. **CURRENT COMMITMENTS**
 - **(YOU CAN CANCEL THEM LATER)**
3. **GET MONEY**
4. **KEEP MONEY**
5. **KEEP SANITY**
6. **WANT TO DO**
7. **REPEAT 3-6**

SESSION 10

RUNNING YOUR PRACTICE BY THE NUMBERS

Causes Lead to Effects...

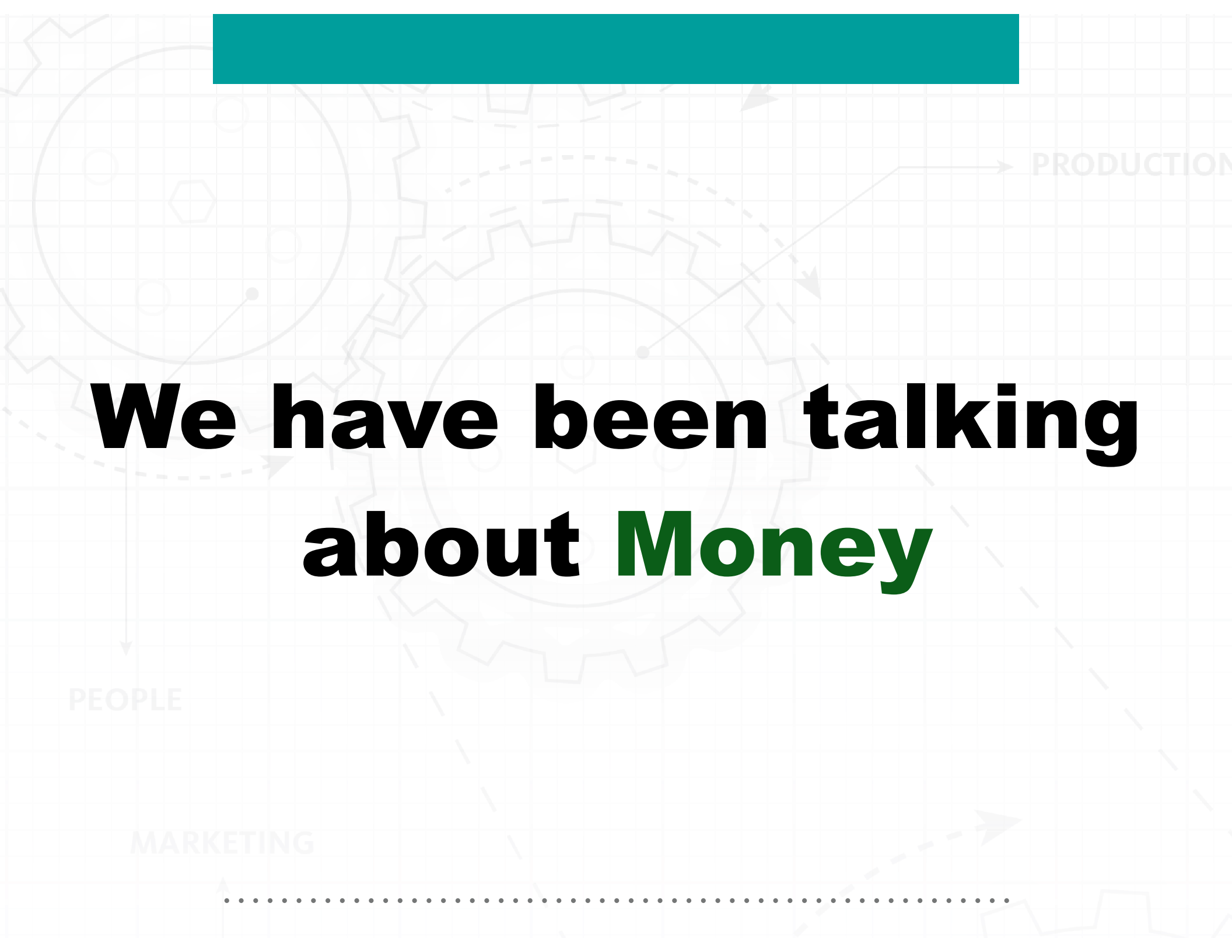
Why Do We Get That So Wrong?



By the Numbers

What Numbers?

- Money
- Measures of Causes
 - Case Opens
 - Case Closes
 - Funnel Data
 - Net Promoter Score
 - Time to Answer Calls
 - etc., etc.

The background features a light gray grid with faint, stylized illustrations of interlocking gears. Various business-related terms are scattered around: 'PRODUCTION' is at the top right, 'PEOPLE' is on the left, and 'MARKETING' is at the bottom left. Dashed lines with arrows suggest a flow or cycle between these elements. A solid teal horizontal bar is positioned at the very top of the slide.

**We have been talking
about Money**



WHAT IS MONEY?



Key Financial Terms

- **Chart of Accounts:**
 - Categories of anticipated revenue and expenses
- **Budget:**
 - Best educated guess for each item in Chart of Accounts for next 12 mos.
- **Budget Variance Report:**
 - Comparison of best guess with reality
- **Burn Rate:**
 - The hourly figure of unproductivity in office
- **WIP:** (Work in Progress)
- **Aged Accounts Receivables:** 30d, 60d, 90+d
- **Cost of Inventory:**
 - $\text{Burn Rate} \times \text{WIP}$
- **R.U.L.E.S:**
 - Rates, Utilization, Leverage, Expenses, Speed of Collection

Key Financial Reports

- **Budget**
- **Budget Variance Report (monthly)**
- **Rolling 12 Month Revenue And Expense Report (monthly)**
- **Cash Flow Projection (6-12 weeks) (weekly)**
- **W.I.P. (Work In Progress)**
- **AGED A/R (30, 60, 90+ day) (monthly, at least)**
- **Cash Position (Operating & Trust)**
- **Balance Sheet**

MARKETING

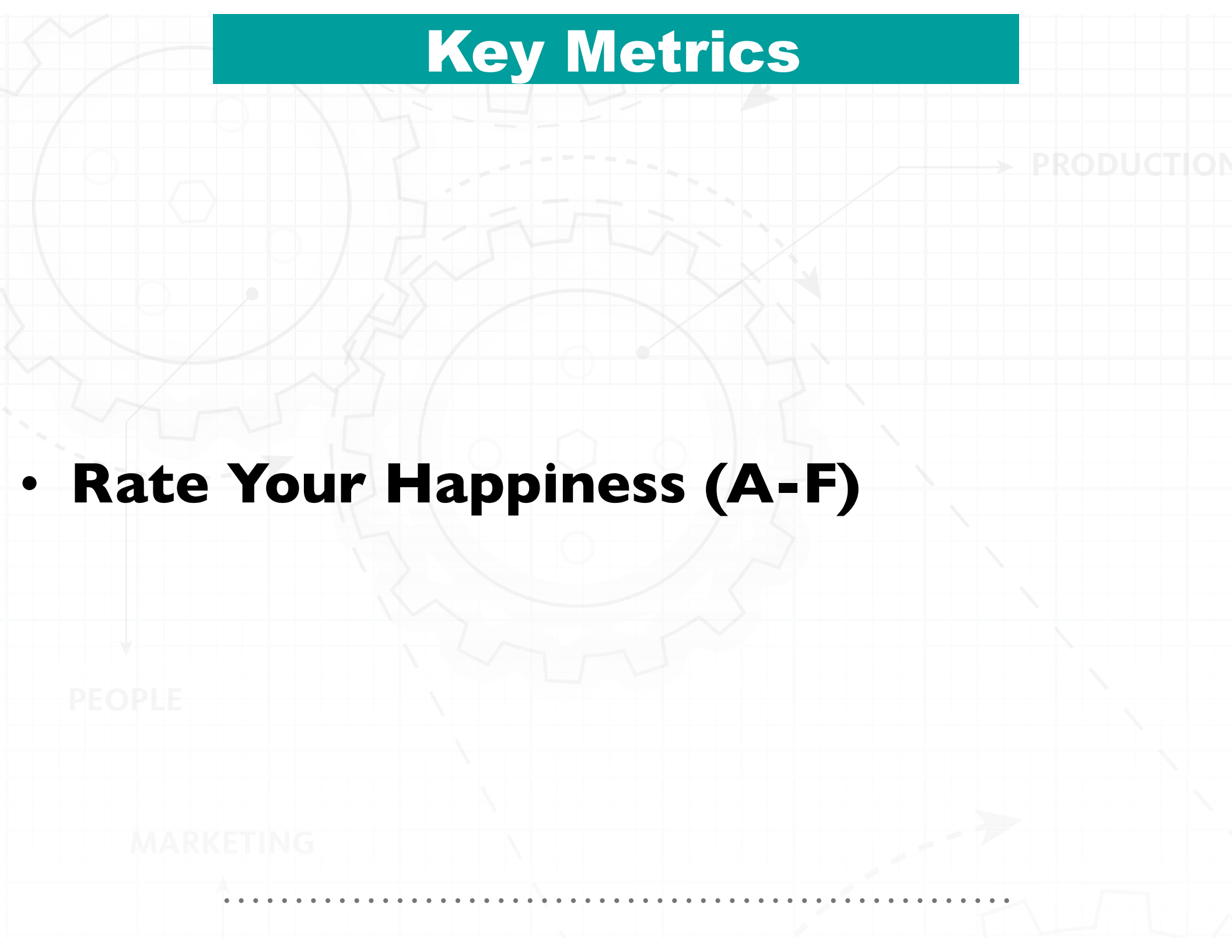
PRODUCTION

.....

Key Metrics

- **# Active Cases**
- **Opened Cases (90 day)**
- **Closed Cases (90 day)**
 - **Weekly Variance**
 - **YTD Variance**
- **HRS / Vacations Variance (weekly, YTD)**
- **Prof. Satisfaction (A-F)**
- **% A-F cases/clients**

Key Metrics

The background features a light gray grid. Overlaid on the grid are several faint, stylized elements: two large interlocking gears, one solid and one dashed; a dashed line with an arrow pointing towards the word 'PRODUCTION' in the top right; a solid line with an arrow pointing towards the word 'PEOPLE' in the bottom left; and a dotted line with an arrow pointing towards the word 'MARKETING' in the bottom left.

- **Rate Your Happiness (A-F)**

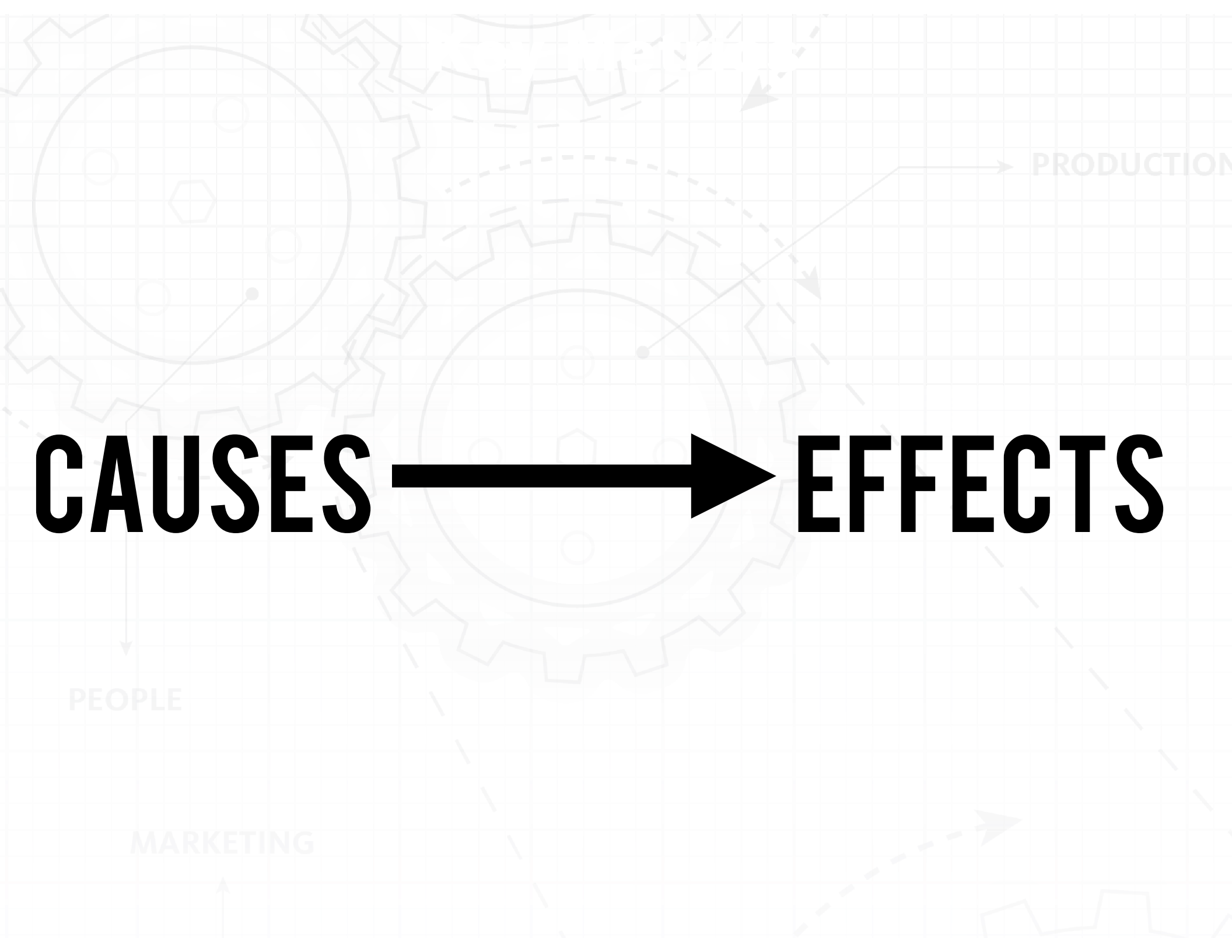
Your Monthly CEO

- How much Revenue have you Collected in the last 30 days?
- How much do you have in your Operating Account today?
- How much Cash does the business need for the next 30 days?
- How much do you expect to be able to Deposit Into Your Operating Account in the next 30 days?
- How much in Accounts Receivable do you have outstanding?
- What's the Plan To Collect that a/r?
- How many new cases/matters have you Opened in the last 30 days?
- What do you estimate the Average Value of these new cases to be?

.....

Your Monthly CEO

- How many new cases/matters have you Closed in the last 30 days?
- What was the average value of the cases you closed?
- How many Active Cases/Matters are currently open?
How many Sales Calls have you had in the last 30 days?
- How many of those Converted and became paying clients?
- How many Marketing Calls with Potential Referral Sources (PRS) have you had in the last 30 days?
- How many Marketing Activities have you taken action on?
- What's currently on your Front Burner to work on making your business more profitable and/ or predictable so it's not all resting on your back (policies, procedures, systems, hiring, firing, technology, marketing, etc.) ?
- List 3 action items you're going to make tangible progress on:
.....



CAUSES → **EFFECTS**

Gift!

HOW TO SET UP & MANAGE YOUR IOLTA TRUST ACCOUNT COURSE

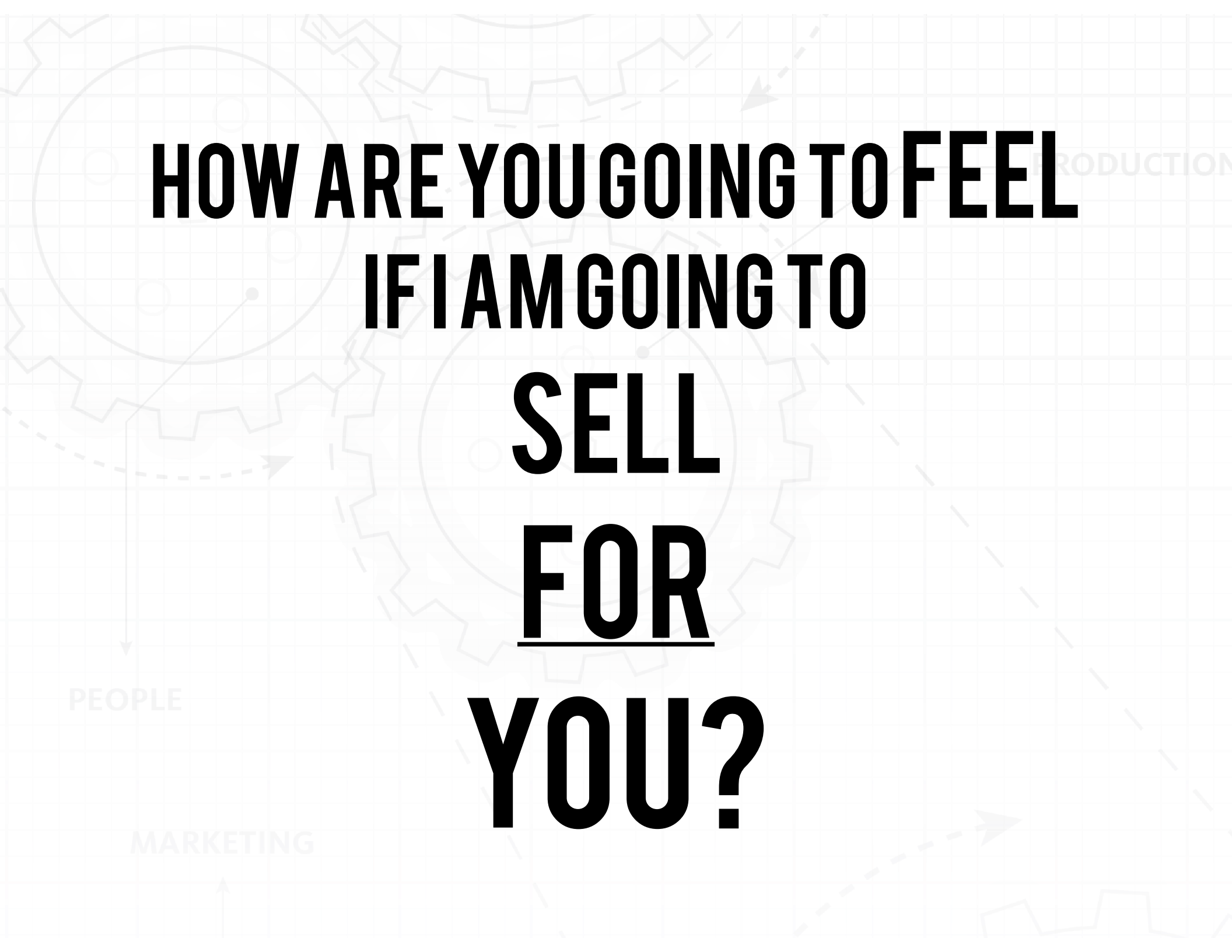
Go to www.HowToMANAGEaSmallLawFirm.com/IOLTA

SESSION 11

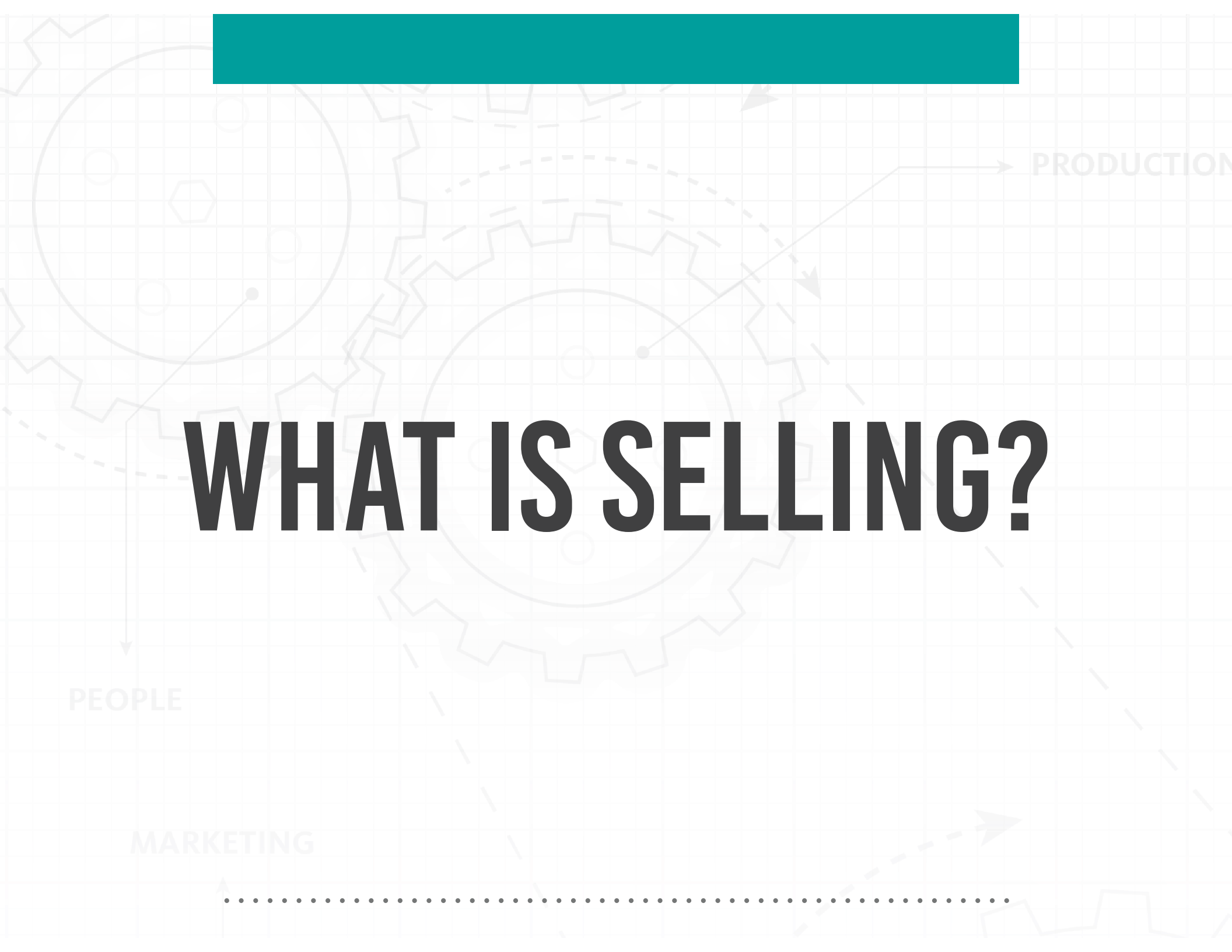
SELLING FOR YOUR CLIENTS

Done The Right Way
Sales Makes Most Lawyers Very Happy





**HOW ARE YOU GOING TO FEEL
IF I AM GOING TO
SELL
FOR
YOU?**



WHAT IS SELLING?

**WHY IS SHE TALKING TO
ME?**

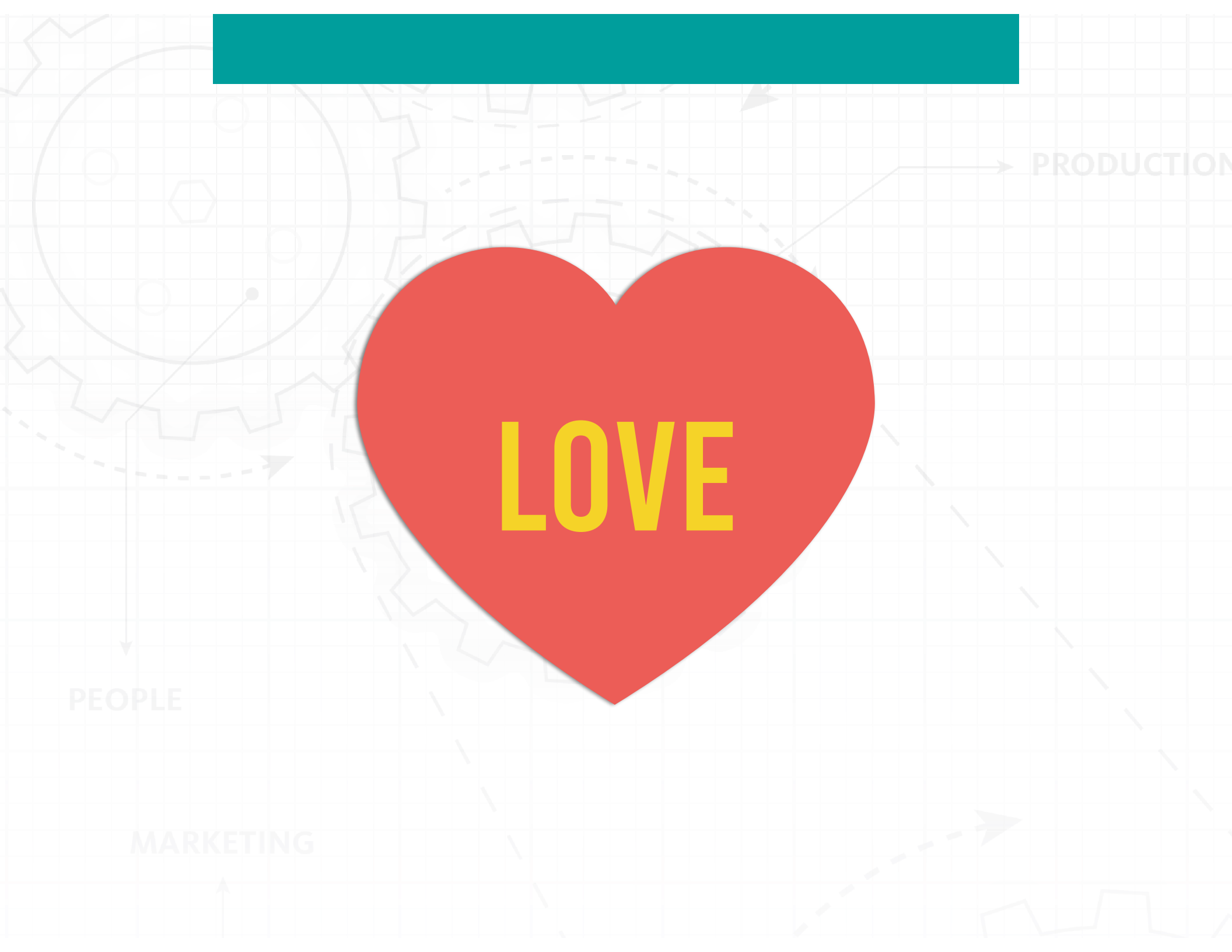
The background features a light gray grid with faint, stylized diagrams. These include two interlocking gears, a dashed circular arrow, and a solid arrow pointing towards the word 'PRODUCTION' in the top right. In the bottom left, the word 'PEOPLE' is positioned above 'MARKETING', with a dotted arrow pointing upwards from 'MARKETING'.

PROFIT

PRODUCTION

PEOPLE

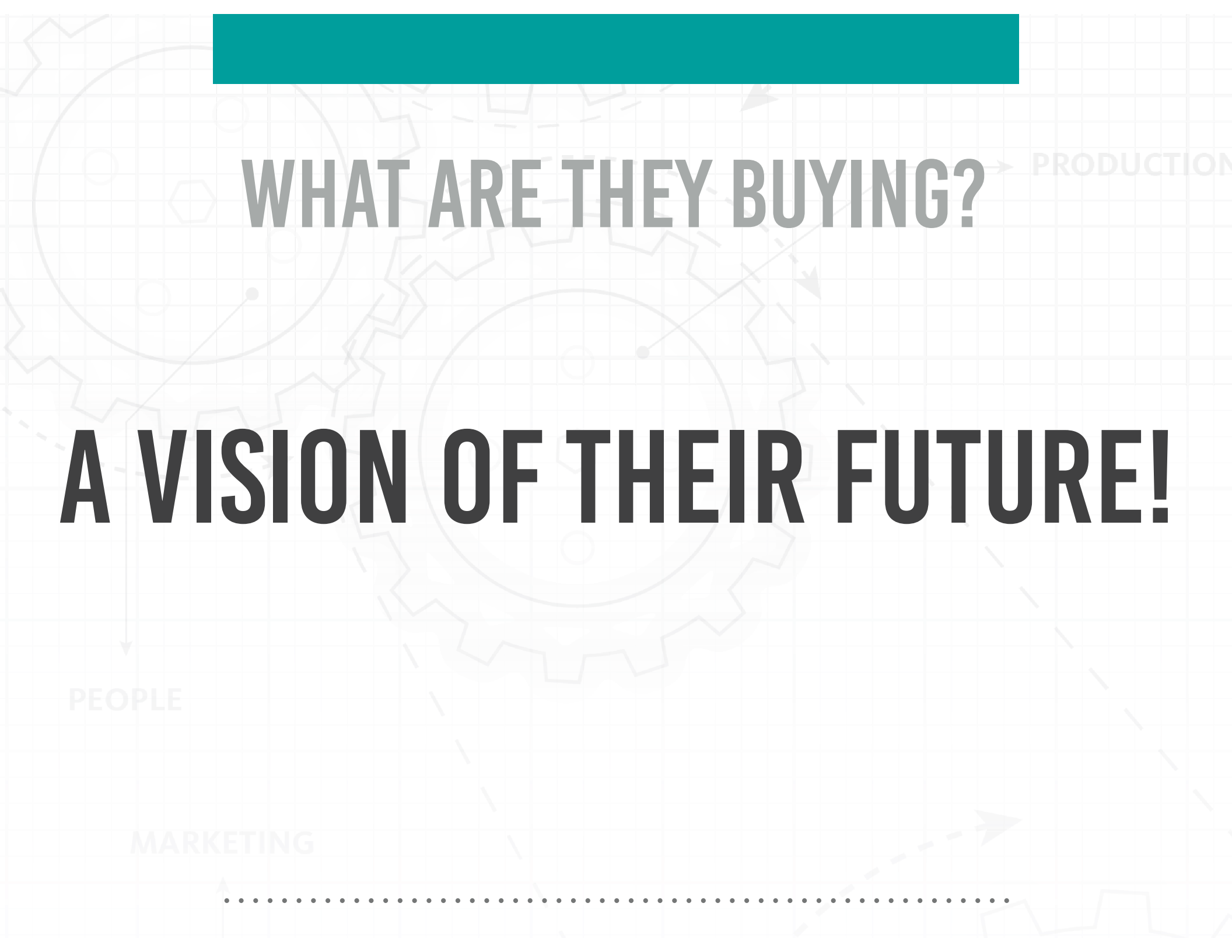
MARKETING





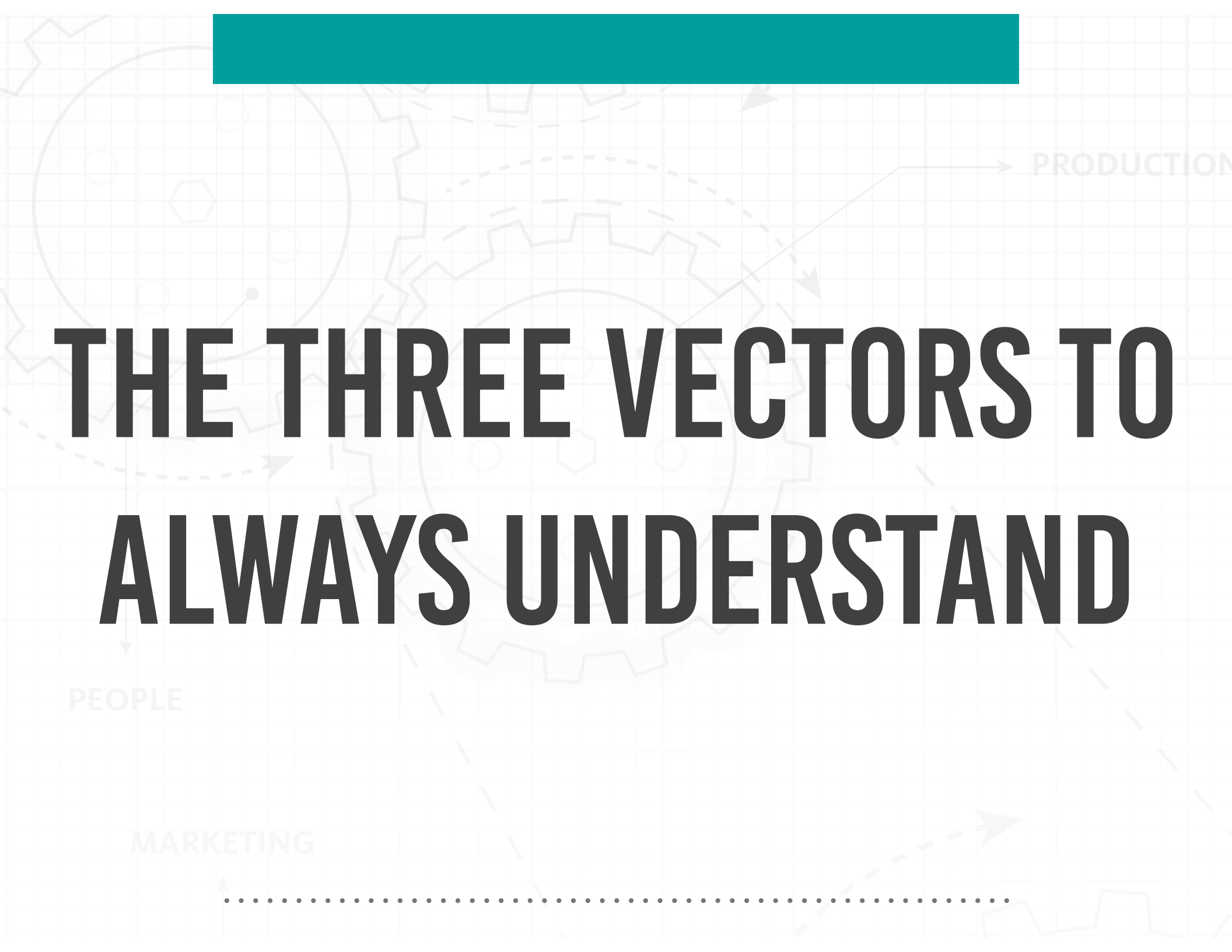
WHAT ARE THEY BUYING?

The background features a light gray grid with faint, stylized diagrams. These include two large interlocking gears, a dashed circular arrow, and a solid arrow pointing towards the word 'PRODUCTION' in the top right. In the bottom left, the words 'PEOPLE' and 'MARKETING' are visible, with a dotted arrow pointing upwards from 'MARKETING'.



WHAT ARE THEY BUYING?

A VISION OF THEIR FUTURE!



THE THREE VECTORS TO ALWAYS UNDERSTAND

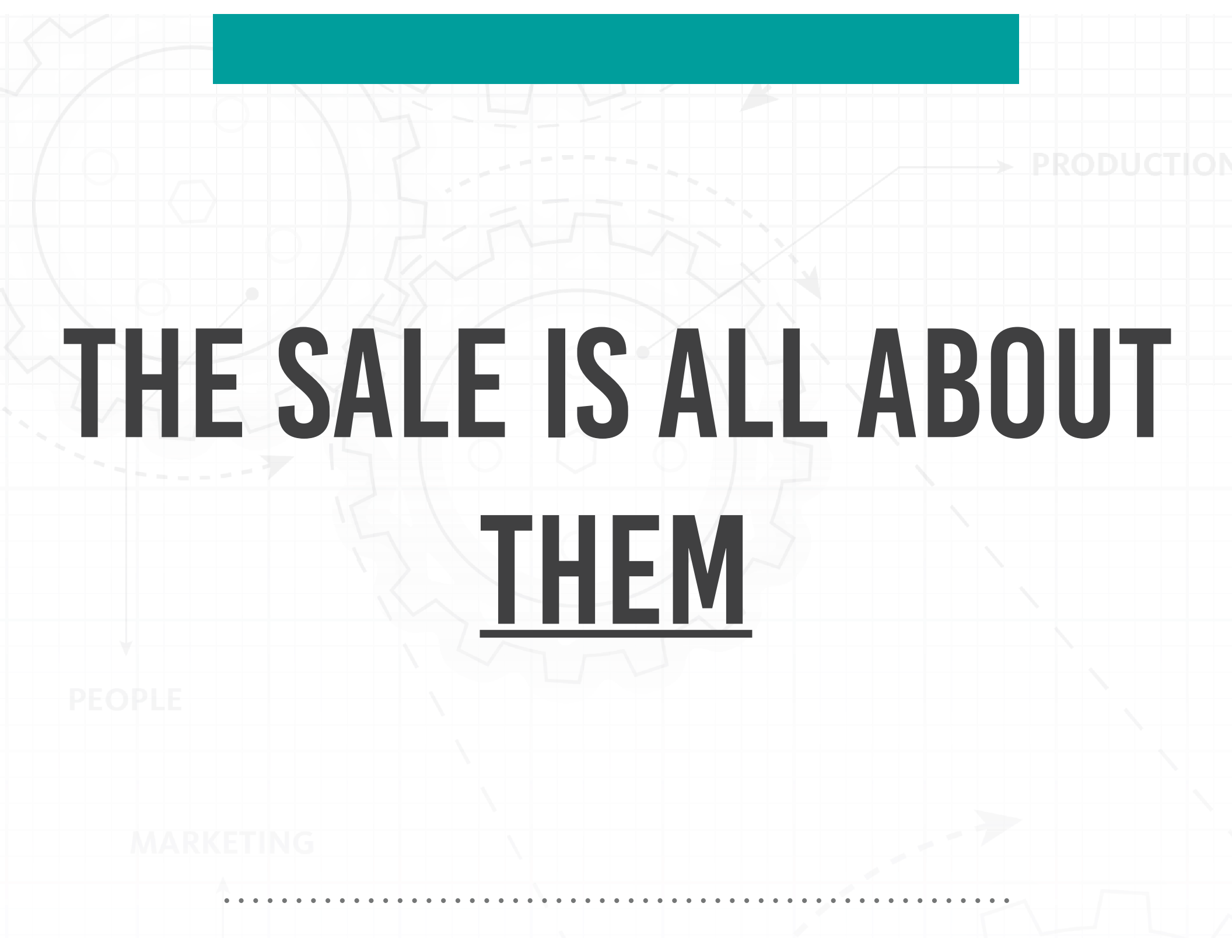
KEYS TO CONVERSION

 *Committment* *Clarity* *Urgency* *Options* *Decision*

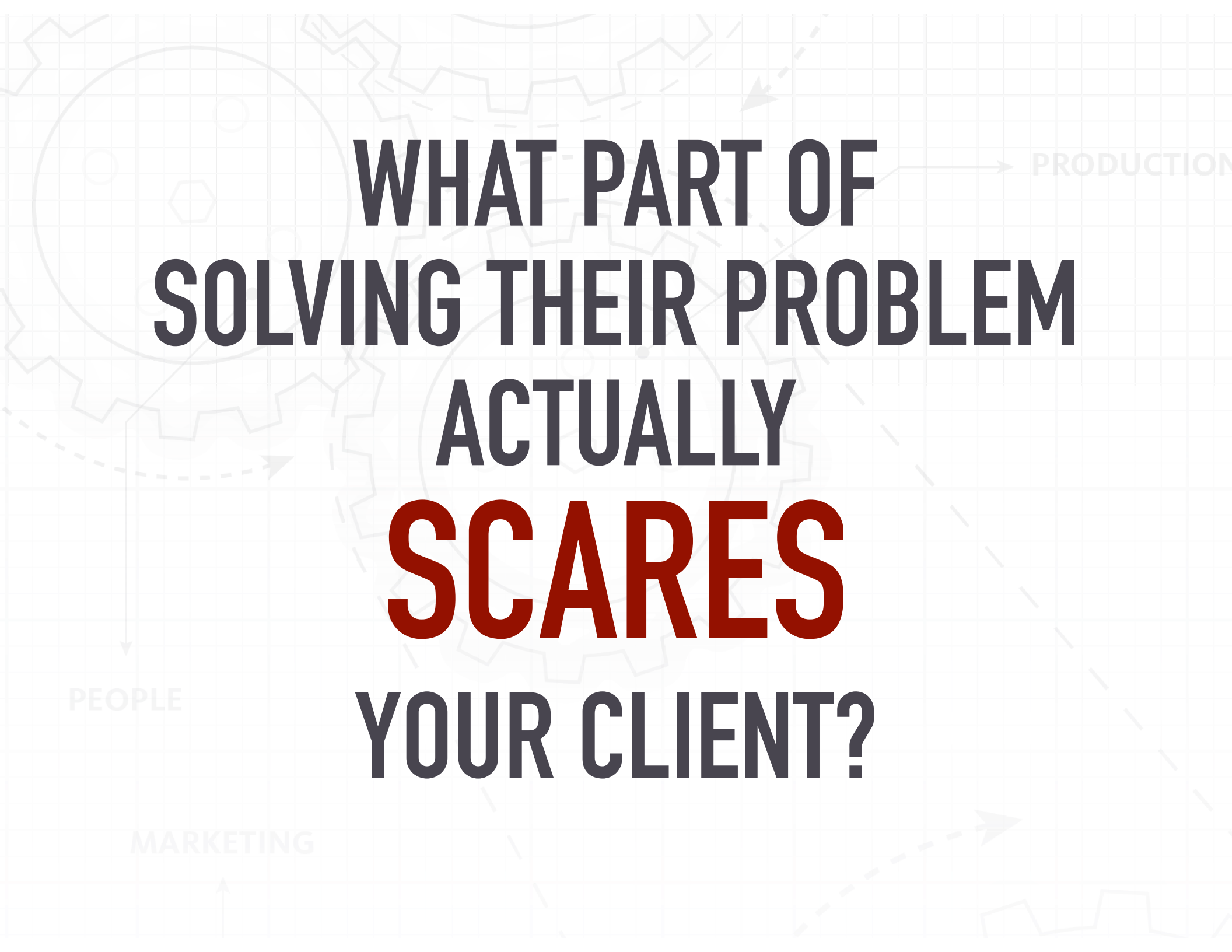
PEOPLE

MARKETING





**THE SALE IS ALL ABOUT
THEM**

The background features a light gray grid. Overlaid on the grid are several faint, stylized elements: a large gear on the left, a dashed line with an arrow pointing right across the top, a dashed line with an arrow pointing down on the left, and a dashed line with an arrow pointing up on the bottom left. The text is centered and reads:

**WHAT PART OF
SOLVING THEIR PROBLEM
ACTUALLY
SCARES
YOUR CLIENT?**

PRODUCTION

PEOPLE

MARKETING



Dairy-Free Vegan
Red Bean
Ice-Cream

by Dietplan-101.com

PEOPLE

MARKETING



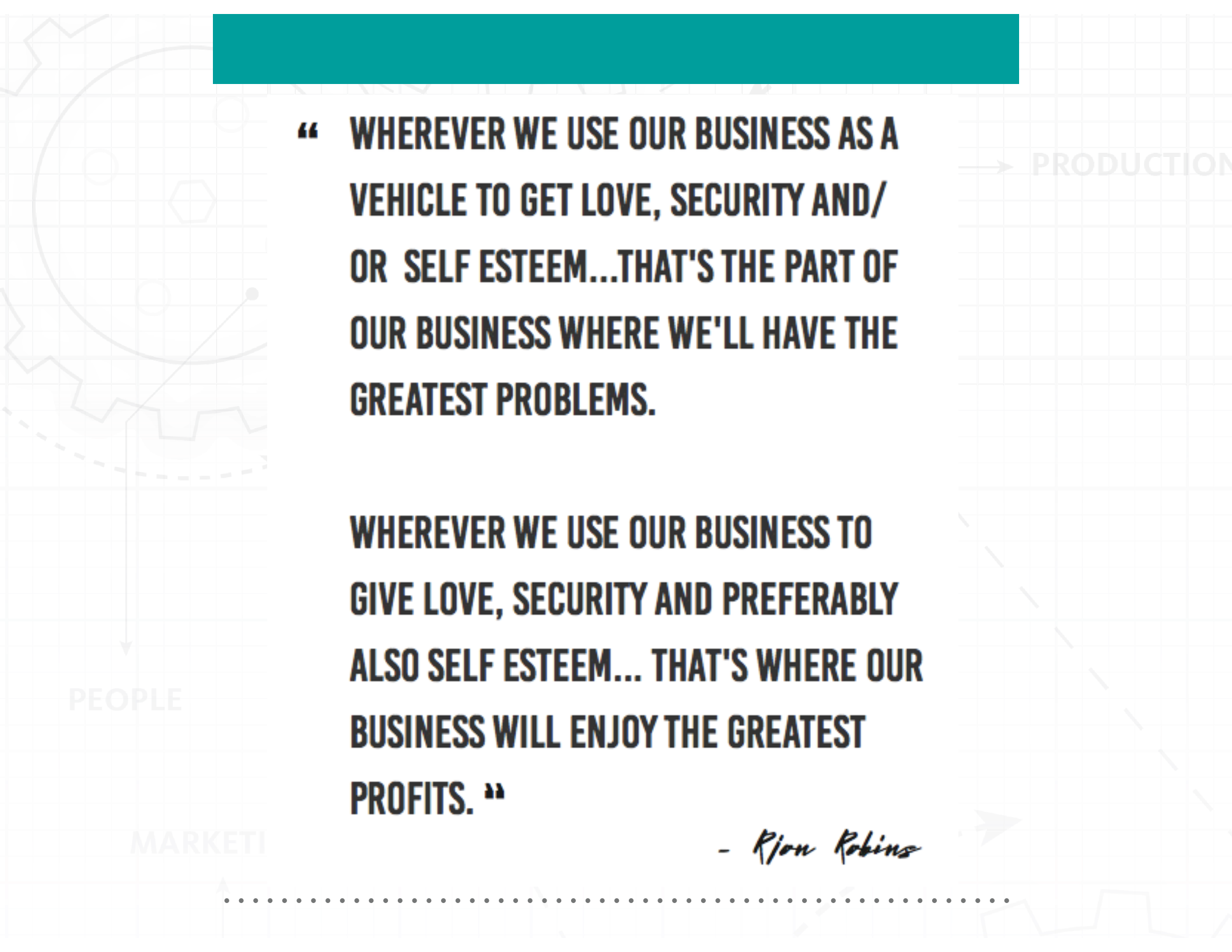
THE SALES CONVERSATION

- I. Open
- II. Problem Identification & Understanding
- III. Explore Options & Make A Decision
- IV. Close

PEOPLE

MARKETING

.....



**“ WHEREVER WE USE OUR BUSINESS AS A
VEHICLE TO GET LOVE, SECURITY AND/
OR SELF ESTEEM...THAT'S THE PART OF
OUR BUSINESS WHERE WE'LL HAVE THE
GREATEST PROBLEMS.**

**WHEREVER WE USE OUR BUSINESS TO
GIVE LOVE, SECURITY AND PREFERABLY
ALSO SELF ESTEEM... THAT'S WHERE OUR
BUSINESS WILL ENJOY THE GREATEST
PROFITS. ”**

- Rjon Robins

.....

EXERCISE

The background features a light gray grid. Overlaid on the grid are several faint, stylized elements: a large gear in the center, a dashed arrow pointing from the top left towards the center, a solid arrow pointing from the top left towards the bottom left, and a dashed arrow pointing from the bottom right towards the center. The text 'MAKE IT REAL' is centered in a bold, black, sans-serif font, with 'REAL' underlined.

MAKE IT REAL

PEOPLE

MARKETING

.....

CLOSING REMARKS

.....

*Becoming a Happy Lawyer
So ... What Changes Now?*



YOUR FUTURE

**WHAT IS THE #1
NO EXCUSES
REASON**

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MARKETING

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