

How to Manage A Small Law Firm CLE

with RJon Robins



In 2008 RJon founded How To MANAGE a Small Law Firm.com which has grown to be one of the leading solo and small law firm management advisory services, dedicated exclusively to the unique needs of the owner of a solo or small law firm. Today How To MANAGE A Small Law Firm.com boasts coast-to-coast membership with ambitious and entrepreneurial lawyers hailing from all practice areas and walks of life. RJon graduated from The American University in Washington, DC and received his Juris Doctorate from Nova Southeastern University, in Ft. Lauderdale, Florida in 1996. RJon is licensed to practice in both state and Federal court in the State of Florida.

Friday, March 14, 2014

**Fircrest Golf Club
1500 Regents Blvd., Fircrest**

**Submitted for 7 CLE credits
(6 general/1 ethics)**

**9:00 am—5:00 pm
Lunch included**

PROGRAM HIGHLIGHTS

- **Understanding the Hidden Connections Between Small Law Firm Management, Ethics, Professionalism, and Profits**
- **Marketing: Setting the Stage for Ethical, Professional and Predictable Growth in Your Law Practice**
- **Sales: The Actual Cause of So Many Bar Grievances**
- **Factory: Organizing and Keeping Track of How the Work Gets Done**
- **People: Who, When & How to Hire, Train, Manage & Make a Profit with Your Legal Staff**

REGISTER TODAY! - Agenda on Reverse



REGISTRATION— “How to Manage a Small Law Firm” —March 14, 2014

Name: _____ WSBA #: _____

Phone: _____ E-mail: _____

Payment: Check Visa Mastercard Card # _____ Exp. _____
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ADVANCE REGISTRATION REQUIRED.

Send payment & registration to:

Tacoma-Pierce County Bar Association
621 Tacoma Avenue South, Suite 403, Tacoma, WA 98402
Questions: 253 272-8871, Fax: 253 627-4718, E-mail tpcba1@aol.com
OR CALL 253 272-8871 TO MAKE A RESERVATION

Sign me up for:

- TPCBA Members \$150
 - Non-TPCBA Members \$175
 - Support Staff \$100
- (registration fee includes lunch)

AGENDA

8:00 Registration and Continental Breakfast

8:55 Introduction and Welcome

Session 1 Understanding the Hidden Connections Between Small Firm Management, Ethics, Professionalism and Profitability.

9:00 *The Four Stages of Growth*

Every solo law firm goes through four stages on the journey from start-up to success and stability. This segment emphasizes how and why small law firms run the greatest risk of getting a bar grievance at the edges of each stage. Participants will be forewarned of the dangers and therefore be better able to prepare and protect their firms against the most common causes of problems, especially as a solo law firm transitions from one stage to the next.

The Seven Moving Parts of a Predictably Successful Law Firm

There are seven moving parts to every successful law firm. Discussion includes how inattention to any of these parts sets the stage for low attorney morale, financial problems, and a risk of disappointing clients. Participants will be able to make sense of what's happening in their own law firms and begin making things better by focusing on the right causes, instead of being scared or distracted by the effects.

The Most Important Question

Among all the important questions a law firm's business plan is supposed to answer, there is one that stands out as being the most important. Most lawyers have never put pen to paper to try to answer this question. Participants will discover case law dating back more than 100 years that supports the conclusion that every lawyer who runs his or her own law firm has an ethical and professional responsibility to make at least a good faith effort at writing a business plan that answers at least this one important question. The rewards will be higher client retention, better client service, less staff turnover - the basis of a successful law practice.

10:30 Networking Break

Session 2 Marketing: Setting the Stage for Ethical, Professional, and Predictable Growth

10:45 It is a mistake to think that marketing has nothing to do with ethics and professionalism. This segment reveals the connection between effective, appropriate and ethical marketing at each stage of a law firm's growth, and a lawyer's risk of becoming the respondent in a bar grievance. Participants will learn the why and how marketing that may be "good" for a law firm to do in one stage of growth could be quite the opposite when applied during a different stage of growth.

Sales: The Actual Cause of So Many Bar Grievances

For too many years lawyers have thought of "sales" as a dirty word. It is not. Or rather it need not be when handled the right way. Instead, sales or "communication with prospective clients" can be the most professional, most ethical, the most humane service a lawyer can ever render a client. Clients, lawyers and our profession in general all benefit when a lawyer learns how to communicate effectively what services he or she can offer ethically and professionally for the benefit of the firm and client alike.

12:00 Lunch (provided with your registration)

Session 3 Factory: Organizing and Keeping Track of How the Work Gets Done

12:30 The key to having a reliable and sustainable law firm is thinking through how, when and why work flows through the system. Law firms with documented policies, procedures and systems consistently outperform those whose owners have not invested in their systems. There are 12 internal policies, 12 external policies, and 24 key operational procedures found in the best-run law firms and missing in most of the law firms we have visited in connection with a disciplinary complaint. In law firms where these key policies and procedures are identified and documented there is usually found better attorney work-life balance, staff morale and client experience.

1:30 Networking Break

Session 4 People: Who, When and How to Hire, Train and Work with Legal Staff

1:45 Owners of big law firms employ professional legal administrators and HR professionals. There's no reason that the owner of a solo or small law firm cannot enjoy the benefits of having a great legal staff, too. A well-managed legal staff should return between three to five times ROI. But most solos or small firms do not enjoy this rate of return on the investments they make in staff. Having a reliable legal staff helps the firm deliver greater value to clients and frees the attorney to focus on doing better legal work. No client wants their attorney attending to secretarial matters on their case.

Physical Plant: Who, When and How to Hire, Train and Work with Legal Staff

It is a mistake.

3:20 Networking Break

Session 5 Metrics: Who, When and How to Hire, Train and Work with Legal Staff

3:30 It is a mistake.

You: Who, When and How to Hire, Train and Work with Legal Staff

It is a mistake.

5:00 Adjourn