HOW TO MANAGE A SMALL LAW FIRM

HAPPY LAWYERS MAKE MORE MONEY

GROWING LAW FIRMS IS OUR BUSINESS
IRON SHARPENS IRON

2018 ISSUE 7

THE MESSY (YET EXTRAORDINARY) BUSINESS OF WORKING WITH LEGAL CLIENTS

Self-Esteem - Your Business Is NOT Your Means to "Feel Good, Catch Friends and Hook"

A law firm's clients are its lifeblood, its heroes and its nemeses. People can be messy and like any business a law firm deals with them at their finest and at their worst--and this goes for both employees, vendors, and clients. For the purposes of this lesson, I'll be discussing clients but even more specifically, choosing our clients and interacting with them. But before I do, I want to unequivocally say that even though your firm is YOUR baby, YOUR magnum opus, it is not and should never be a way for you to bolster your ego, your self-image nor shall it be a source of finding a fan club or new friends. You may not even have discovered this flaw in yourself yet. It is somewhat sinister and covert in nature so I tell you this to suggest that you maintain an open mind as I flesh this out for you here. You need to figure out who your best clients are and then, you must create a policy of which clients soar to the top of the rating scale and which dance around the line of being weeded out to preserve your firm's zen.

As I have said, we can help anyone, but as soon as we try to help everyone, we are ruined for our very best clients.

The client rating system is much more than a way to avoid clients who are pains because you or your people are irritated by them. It is the way to avoid a drain on your firm's resources so that you have the energy and wherewithal to take care of those clients who agree with your philosophy and can gain the very best experience. If you waste your best on the worst, the clients you want are the first ones to suffer, and you and your team are right in line behind them. When clients go bad, employees are stressed, tension fills the firm, and worst, the genuine probability of dangerously shocking reviews looms. And those issues are only the tip of the iceberg. Costs to your firm just pile up from there.

You have heard my "No Assholes" policy.
To be clear, I never "enjoy" enforcing our No Assholes Policy. In fact, in most cases when this policy is applied, it more of a person operating from a deepened black abyss of fear rather than a person who behaves badly because that is who he is at his core.

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ISSUE HIGHLIGHTS

HIGHLIGHTS

SPECIAL TWO-DAY DIRECT RESPONSE MARKETING WITH RJON ROBINS AND MIKE CARROLL

QUESTION: WHAT CAUSES ATTORNEYS TO TAKE CLIENTS THEY SHOULDN'T?

Lawyers accept work from people they know are going to be clients from hell for one major reason - they don't have enough clients.

And the number one reason for not having enough prospects is bad marketing. It's not a complicated equation. In October, RJon and Mike Carroll held a two-day, Small Law Firm Direct-Response Marketing Workshop.

RJon and Mike aimed to help open Members' eyes to a world unknown to most small business owners. Direct Response marketing is a very different world one that offers an entire different way to think about life.

Freedom.

This powerful, first-time Direct Response Marketing Workshop wowed its participants who all left with their own content already begun and a clear strategy to put their first campaign in place...all by themselves. Here is a peek into the highlights of this first-ever event.

TOP FOUR TAKE-AWAYS FROM SMALL LAW FIRM DIRECT RESPONSE MARKETING WORKSHOP

1. Every business owner should attend this workshop. Direct Response marketing places your marketing power squarely into your own hands. Understanding how you, your message, and your firm are the magic to attracting the business you are seeking is life-changing. Becoming your own touchstone as a credible authority by putting your message out into the universe with a means for your audience to grab the golden ring will transform your marketing.

2. Accountability is the number one ingredient. And not only that, it is the practically the ONLY ingredient for success. Does whatever marketing you are doing produce measureable results? Are those results amazing for your firm or were there crickets as a result? You must know the answer at all times.

3. Learn to test, and test, and test. Everything in life is a test. Side by side campaigns must be measured and analyzed. Whichever works best, keep it, whichever is failing, change something. Its color, its content, its shape, its image, its audience. Run the test again, and measure and analyze.

4. Always, always, always include a Call to Action in every single marketing campaign, ad, video, audio, or post. Without instructions, the audience doesn't know what to do. Do not get complicated. Simply direct the target to do a specific action.
--Download this free book.
--Click here to schedule.
--Enter your email.
--Click box for your free report.
--Place an order.
You will know it works when your targets take action.

5. Lose your curiosity about why it works or why it doesn't. When you find a campaign that works for you, celebrate and then leave it the hell alone. Keep it going and keep it working. Until it no longer works. And when it stops working, fight the compulsion to wonder why it stopped and simply make a tweak and begin something new.

6. Lose your desire to be loved in your marketing. Direct Marketing elicits criticism. People are lazy and do not like to act. Direct marketing tells your people they must do something and the tactics you use are all directed toward making that action happen. Opposing colors, arrows, copy markets and lots of mark-ups are all tools used to help compel action. Prepare for people to criticize you because you make them uncomfortable with your direct response marketing.

Get OVER the need to be liked and the need to be right. If you have the need to be right, it will be hard to send the second DR piece or the third piece. But know this, people will sometimes carry around your "ugly" pieces of marketing for six months before acting. What's more, they will take it out and share with a few friends too. Do not underestimate this incredible value.

Profitable DR
- **Trackable**
- **Measurable**
- **Uses compelling headlines and sales copy**
- **Targets a specific offer**
- **Includes a clear call to action**

Remember:
If your marketing does not make a clear call to action, or if it does not include a specific offer, it is not direct response marketing.

WANT TO GET TO THE NEXT MARKETING WORKSHOP?

This workshop will help your firm's marketing become the most PROFITABLE part of your business & will help you generate the most ROI you possibly can... And you'll actually SAVE MONEY by attending this workshop because it is exclusively available to the solo lawyers who have our unmatched liability insurance coverage, which is competitively priced for HTM Members.

FIND OUT HOW TO GET YOUR FIRM PROTECTED UNDER THIS POLICY & RESERVE YOUR SEAT AT THE NEXT WORKSHOP!

For more information email stephanieg@howtomanage.com

HTM CONNECT EVENTS

Million Dollar Club Prep Academy Meeting
December 6th-7th, 2018

Mindset of Success
Miami, FL
December 9th-11th, 2018

Sales Mastery Laboratory
Miami, FL
December 12th-14th, 2018

Discovery Day
San Antonio, TX
January 18th, 2019

Live Quarterly Meeting
San Antonio, TX
January 19th-20th, 2019

FIVE WAYS TO GET THE MOST OF YOUR LIVELY QUARTERLY MEETING IN THE DAYS/WEEKS THAT FOLLOW

1. SPREAD THE LOVE

Remember all the ideas and new tasks you dreamed up while you were high into learning at the Live Quarterly Meeting? It's time to get those into the right hands. It's best if you make a plan for this download while you are still in the throes of your LQM mindset. Go through your notes and number or color those things that should be shared to correspond to the person you will be sharing it with. Then, schedule time on your calendar within the first two days of returning to get this download done.

2. SCHEDULE TIME TO WORK ON YOUR BUSINESS

The more you learn about systems, and policies and procedures, the more the need for time to work on your business will grow. Block time slots on your calendar to address the ideas and tasks you now have in your pipeline.

3. MAKE THE HTM FORUM YOUR FRIEND

The education and camaraderie forged within the forum day to day is like having hundreds of like-minded advisors at your disposal. Plus, as members raise questions and concerns, you benefit from the responses and proven best practices without having to suffer the agony of your own trouble shooting. What a concept! RJon interacting through the forum is like having 24/7 access to the personal coach you can't get enough off at LQM. Get on the forum, eavesdrop to your heart's content, and offer your own tidbits when you can--it's all the lifeblood of one of How To Manage's most precious commodity.

4. DOWNLOAD THE APP

If you have not yet done this, do it right now. Don't wait. Listen to mindset calls, LQM sessions, and access tools anytime you have a few free moments. Remember that greatness is achieved from small changes, tiny hinges swing big doors as they say, and the more you learn tweaks and lessons learned through colleagues, the more the principles you learn become part of your DNA.

5. COMMIT

If you have yet to plan your next LQM trip, do it now. The momentum you are experiencing is part of your success formula. We stop and start too often in our journeys to create the law firm of our dreams. These pauses--with or without you realizing it--are energy sucks that drain you and your law firm. Understanding this early on will serve you in your efforts to accelerate. While you are still soaring, and before you even begin putting your plans into place for the quarter following LQM, put the next LQM on your calendar, and get your flight booked. Decide there will be no stop/start this quarter and use the power of momentum to your advantage.

THE ROAD TO MILLIONS
CHOOSING YOUR JOURNEY

By: RJon Robins

It's lonely being the owner of a multimillion-dollar firm. Don't get me wrong, it is **SO** much better than the alternative. Yet, it's also lonely. And confusing.

What IS the Million Dollar Solo Lawyer's Club?

Owners of multimillion dollar firms have LOTS going on. So much, that when we created this program, we learned that members determined the perfect number of meetings each year - three. Four two-day retreats were too many and two were not enough. Because we know they also want to attend some Live Quarterly Meetings, we set the number at three.

What's more, HTM strategically holds these retreats in very nice and interesting places that allow us to enjoy access to unique and interesting people that bring unique perspectives to life and business.

What's the Purpose?

The Million Dollar Solo Lawyer's Club is a unique opportunity for the owners of law firms with revenues totaling at least $1.5 million to come together and reflect on each's personal journey.

1. HOW CAN I REPLACE PART OF WHAT I DO **EACH DAY?**
2. HOW CAN I LEAVE THE JOBS IN MY FIRM I USED TO DO **WITHOUT** LEAVING A GAP?
3. WHAT MUST I BECOME TO **CONTINUE TO GROW?**
4. **HOW DO I GET THERE?**

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Law firm owners that surpass the $1.5 million mark are in a new place. The truth is, when your business grosses at least $1.5 million a year and is run by a full-time professional legal administrator, what material shiny objects do you really need? These law firm owners now have systems in place and can step away from their firm for 30 consecutive days each year if they choose.

At **HTM**, we know that there are other intangible benefits that the owners of all multi-million-dollar law firms must deal with including freedoms of choice. Frankly, you can't know these until you have arrived. At the end of the day, most people don't really experience true freedom. Because of this, most are untrained, and inexperienced at and unfamiliar with, how to handle the sort of freedom that comes from having enough income to do pretty much whatever you want to do. We long for it. We say we're working for it. But we don't really, truly "know" what it means. And then one day we wake up and realize we are there, we have it all...and we know neither what to do with it.

HOW SHOULD I FEEL ABOUT THIS NEW STAGE OF LIFE?

HOW SHOULD I DEAL WITH PEOPLE IN MY LIFE WHO ARE CONFUSED BY IT?

WHAT NEW CONCEPTS, JARGON, AND CHALLENGES ARE COMING MY WAY WITH THIS NEW LEVEL OF FREEDOM THAT ONLY A VERY SMALL PERCENTAGE OF THE WORLD EVER GETS TO EXPERIENCE?

WHO WILL YOU BE WHEN YOU NO LONGER MUST WORRY ABOUT 80% OF THE THINGS THAT OCCUPY 80% OF YOUR ATTENTION TODAY?

The main purpose for The Million Dollar Solo Lawyers' Club

Members experience extraordinary moments with extraordinary people.

- Explore full access in a two-day back office and back of house tour of a $5 million estate planning firm to see how the sausages get made from soup to nuts.
- Dig into an actual marketing workshop with live prospects in the room, going on-set for a recording of a firm's weekly TV & radio spot.
- Slip into a private meeting with Kevin Harrington from the first two seasons of Shark Tank and learn how we're all on the same road only some of us are just in different parts of the journey.
- Learn to build high-performance training programs by understanding the difference between merely "driving" vs. "high performance" driving and then put those skills to the test by racing a bunch of $200,000 Ferrari's on a closed track.
- Gain access to private meetings with an amazing healer who uses horses as a therapy tool and who taught us through experiential learning that it's not about the horse, it's about what's going on inside of us.
- Test yourself with ropes courses, sleep in an Ice Hotel, or meet Cuban entrepreneurs building businesses under the most oppressive of circumstances.

Larry Brown, Esq., Founder of Brown & Sterling, & wife Sharon Brown

Want to learn more?
www.howtomanageasmalllawfirm.com/Appointment

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ADMISSION INTO THE MILLION DOLLAR SOLO LAWYERS' CLUB REQUIRES:

a. Gross Revenue of at least $1.5 million per year (we'll look at the last 6 months you're on track)
b. Employ a full-time Professional Legal Administrator/COO who is not your spouse or significant-other.
c. The demonstrated-ability to not work "in" the business for 30 consecutive days each year with "Emergency Access Only". Some Members choose to work "on" their business during some of this time off. The key word there is "choose".
d. Demonstrated ability to take-off four additional non-consecutive weeks per year (these are for-real, "off").
e. Submit to an interview process with members of the HTM team.
f. Submit to a "get to know you" session with the entire Club who has the final veto power for admission.

PRE-QUALIFIER MULTI-MILLION-DOLLAR SOLO ATTORNEY ENTRY RAMP - MILLION DOLLAR PREP ACADEMY - CHRISTOPHER ANDERSON

This is a very specific, curriculum-driven two-and-a-half-year program that Christopher Anderson and I have carefully designed with advice and input from mentors, friends and business associates. More specifically it's 10 quarterly meetings with homework and additional resources, which are designed to help you stretch and build, tear-down and rebuild, and test some additional parts of your firm so that the firm itself can support you in your application to The Million Dollar Solo Lawyers' Club, or in any other areas of your life where you believe it would be worthwhile to have a business that meets the above qualifications.

FAQ

MILLION DOLLAR PREP ACADEMY AND MULTI-MILLION-DOLLAR SOLO LAWYER'S CLUB

Q: What is the investment for each?
A: $1,500 per month (same for both)

Q: Should I enroll in the Academy AND "The Club"?
A: No, it's one or the other

Q: How should I decide whether to enroll in the Academy or Plus?
A: "The Club" is totally tactical. It's all about solving immediate problems that are vexing you. It's not meant to be strategic, at all. The Academy is mostly strategic. The tactics are spoon-fed to you in "The Club" in service of the stated strategic goal.

Q: Does it matter when I enroll The Academy?
A: You can begin at the start of any quarter. The curriculum is a "rolling" curriculum.

THE 3 BIGGEST MISTAKES YOUR LAW FIRM CAN MAKE

When it comes down to it, your law firm is just a business. When your company collects revenue to pay all your bills and, of course, you, it is likely you are on your way toward owning a business with staying power. Too often, attorneys tend to approach their business with a different point of view. Without drilling down to understand the 'why' behind this, (perhaps it is the nature of the industry) there is a distinct resistance to embracing innovation.

It's time to look out though because the time has come for lawyer to begin creating more efficiencies by considering how their processes can work better. Take a look at what we think are the three biggest missteps law firms can make that could hinder the ability to survive in the future.

1. IGNORING NEW TECHNOLOGY

The dawn of technology on the age-old practice of law is not new. In fact, it is igniting a shift that is moving at lightning speed. That's why this mistake is at the top of our list. Pretending this shift is not occurring in a landscape that continues to suffer more competition and the pressure to offer more for less can be a recipe for failure. Using technology in the smartest ways possible is the number one way to build those efficiencies that can maintain a competitive edge.

Those law firms that become technology firms that happen to practice law will be the ones that speed to the fore and thrive. As the business owner, your time has come to investigate where your firm can benefit the deepest from new technology and begin researching these. If you have a habit of lagging behind, take a pledge to adopt a new mindset to become an early adopter.

2. NOT INNOVATING PRICING

Taking the initiative to move past the sacred cow of hourly billing is an innovation that will revolutionize your firm. Today, clients want to know what they are in for and the model of hourly billing is too unpredictable and undesirable. The conflict of a law firm to get paid minute-by-minute leads to an incentive to supply less for more, leading to clients who require more problem-solving and management. The bottom line is clients become dissatisfied rather than becoming raving fans. The law firms of today that are reinventing fee structures are attracting clients who want transparency; they are winning in the race to attract the right business. If you have not investigated this yet, you are already steps behind your competition.

Truth be told, to do this well so that your firm wins, you must measure, everything. Tracking your key performance indicators and analyzing your workflow and cost date will be your tools to get started.

3. FAILING TO FOCUS ON THE CUSTOMER

Today's customer is no longer tolerating that certain prevailing attitude of the law firm that tells the customer how it's going to be. Becoming a firm that places the client at the center of everything purposefully is a firm's ticket to becoming the modern-day firm. Customers today have far more options than ever before for solving everything from their television options to their legal services.

The business of today is one that is fluid and continues to anticipate changes and improvements. As your clients' needs change, so must your processes and offerings. Being a stoic player in the world of today's business will surely impact a firm's outlook and is likely the most significant elephant in the room of firms having difficulty keeping up on the competitive landscape.

MEMBER SPOTLIGHT

It was November 12, 2015. My friend Susan and I attended the Annual Small Law Firm Practice Management Symposium at the NYC Bar Association.
I know, this is a boring start, but wait, it gets better.

My firm was 22 months old and my revenues totaled $21,033.90 for a two-month period. My 50-sq. ft. office was located on a desolate street in a building where the locks to the front door broke and the landlord hadn't bothered to fix them for a week. My main nutrient sources then were Monster Energy drinks, 5-Hour Energy shots – and on days when I was feeling more health conscious – Diet Mountain Dew. Susan and I sat and listened to uninspiring people with 47 Twitter followers telling us the ethics about social media and how to be a "solo on a shoestring budget." I needed to make a break for it, but before I could leave, this bald guy with widespread arms came to the mic. His presentation was 45 minutes and I don't think we even got CLE credits for it.

He got my attention though, asking the room if we would believe him if he said we could have a million-dollar law firm in 18 months. He said words like "shit" and "asshole". Hmmm, intriguing, refreshing, I thought. He was talking all this gibberish about delegation and teams and these different parts of a law firm. I suddenly started vibrating. Growth? Hiring people could make me more money? And help me live better and stress-free and give me time for other things? Nonsense. What would that person do all day? And the money, well, yeah, I do need a little more. I mean, my 350-square foot studio apartment is fine, but I wouldn't mind moving the office to a place with a lock. At first, I thought, whatever this guy has, it's too slick. I don't want it.

Yet, somehow a call gets scheduled. And it's scheduled for a time when I'm in the car back from a weird murder trial in Virginia. (I was paid $3000 for the trip which involved about 70 hours of legal work and paying local counsel to PHV me in.)

I call the number and ask for RJon. Whoever answers won't put me through to him. WTF? I was like, "Can you just let RJon know that I need to cancel and don't want to reschedule?" and I hung up.

And then Renee calls me a few weeks later. I tried to get her off the phone, Is aid, "Later, later...I am just too busy.
She asked me, "What will be different later?" Please just stop talking to me. I want to get off the phone,

.... but I was haunted for a few days by her question.

And I looked at my life and how I was scraping by off a dwindling inheritance from my grandpa. And I was like, nothing will be different then. Or ever.

"... and the next month, my number was $106,939.67. I had achieved a million-dollar law firm!"

CARRIE GOLDBERG
C. A. Goldberg, PLLC
cagoldberglaw.com

And I did what I always did when money was tight – I'd think about what I could sell to keep the firm open. Okay, yes, the ring I wear everyday my grandpa gave me before he died from leukemia, the studio apartment. What else? What else?

Finally, I folded. It might not be today or tomorrow, but soon a day would come when I'd need to ask my dad for money, unless I did something. Closing shop when my young rape victim clients needed me was not an option. Already the finite resources were dwindling and it was only a matter of time. I crept out of the fuselage as I took the credit card out of my wallet, and listened to myself reading the Chase numbers to this unrelenting Renee. I still don't HAVE to go, I comforted myself.

I was scared. Scared I was going to be told my business was all wrong or that these people would somehow take my firm away from me. Or dismantle it. Or make me shill for them and be forced to give speeches on their website. Meanwhile, the words of Christopher Anderson from that first night echoed in my head. In 18 months, a person could have a million-dollar law firm. Somebody said that means three consecutive months of $83,333.33+ shows it's happened. It means a system is in place to replicate those numbers. I worked hard and did what they told me to do.

When I marked the end of the 18th month from when I joined HTM, my revenues were $95,604.40. The next month, they were $93,995.63, and the next month, my number was $106,939.67. I had achieved a million-dollar law firm!!!!!

What will be different later?

C. A. Goldberg, PLLC
cagoldberglaw.com
Ruining everything for psychos, assholes, pervs & trolls

"if I weren't with HTM, I wouldn't do a f'g thing"

WILLIAM BLY
WTB LAW | CRIMINAL DEFENSE GROUP

I wish I had known about this program when I first started practicing law back in 2005. I built so many F'd up systems that I'm so reliant on, with no safety net like an actual Policy & Procedure plan which resulted in me having difficulty in growing to a seven-figure firm. My lack of infrastructure, financial controls, budget, business plan, etc., keeps me stuck where I currently am (and I consider myself pretty successful but nowhere near where I'd like to be) and more importantly, has allowed me to operate in ignorance of my own blind spots, unable to deal with my obvious weaknesses. Operating like this has been a comfortable place and a safe place. Putting systems in place is scary. Looking at my financials carefully is scary and overwhelming. Creating a business plan is extremely uncomfortable and if I weren't with HTM, I wouldn't do a f'g thing. But these HTM guys have my back and so does the membership.

I always remember that I am responsible for my own mindset. Period. No one else can make me feel the way I do. I can change my future path by changing my mindset. Hell, I've been creating a business with no training in marketing or client management; everything I have done has been based off instinct alone. Now, I can't wait to see what RJon's team is going to show me over the next 12+ months.

Bill

William Bly
WTB Law
Criminal Defense Group
We help good people, who've made bad decisions, avoid criminal consequences.
williamblylaw.com

HOW TO MANAGE A SMALL LAW FIRM
HAPPY LAWYERS MAKE MORE MONEY

THE MESSY (YET EXTRAORDINARY) BUSINESS OF WORKING WITH LEGAL CLIENTS (CONT.)

By: RJon Robins

A big part of how we make sure we have happy lawyers and happy lives is by being sure we only work with great clients. The recommended grading scale is what firms use to evaluate clients. Life is too short, and there's too much opportunity out there, to spend your life working with the wrong people.

Case Study: The How To Manage Client Rating System - Our "No Assholes" Policy

There are many benefits to being a How To Manage "A" client.

We supply bonuses, extras and opportunities that we don't widely advertise. Our HTM team members are afforded these so that they may be empowered to go the extra mile for our "A" clients.

The flipside is that any member can leave the group at any time. Naturally, our team also reserves the right to invite certain people to drop out too. I never want to have to extend that invitation. My deepest want is for each member to get the most out of this program so that they can achieve all goals which law school, unfortunately, did not equip them (or any of us) to achieve at the business of marketing & managing a successful law firm.

I am sharing the How To Manage manifesto for working with "A" clients. As you craft your firm's "A" Rating for Clients, you may keep ours in mind.

What it means to be a How To Manage "A" client/member (in no particular order):

- Our team likes working with the Member.
- The Member likes working with the How To Manage team.
- The Member is highly-motivated to have a successful law firm and all the benefits that flow from it.
- The Member has tangible and objectively quantifiable goals that excite him/her.
- The Member respects my staff and appreciates them for the very challenging work that they do servicing and keeping hundreds of lawyershappy from all around the world.
- The Member responds to the mistakes that we make in our business with the same grace and maturity the Member would expect his/her own clients to demonstrate when the Member's own law firm makes a mistake.
- The Member believes that the best investment he or she can make is an investment in him/herself.
- The Member cooperates and supports our policies
- The Member is collaborative and intellectually generous with the Group.
- The Member has a good sense of humor and is not easily offended by liberal use of the "F" word especially when it's so richly called for in an explanation!
- The Member does the work required to translate the lessons, tools, insights, ideas, templates, and instructions we provide into tangible results.
- The Member is honest with us and him/herself
- The Member remains current on their financial obligations to us and otherwise follows the rules we have established and which are designed to help all our Members get the best results possible.
- The Member embraces a positive, prosperity-based outlook on life – no whiners or crybabies allowed!