



ALL DIGITAL MEMBERSHIP

**HOW MOST LAWYERS
BECOME A SLAVE TO
THEIR LAW FIRM
(AND WHAT YOU CAN DO TO
BREAK FREE!)**



FEBRUARY 2019 COACHING CALL

Scott: All right. So I want to welcome everyone to our all-digital How To MANAGE a Small Law Firm coaching call. My name is Scott Whittaker and I'll be your host. RJon Robins is on the line with us. It's going to be a great call today. You know, one of the things we say every time we start these calls is that you should treat this call as if you were meeting with a potential new client. So you wouldn't be checking email, you wouldn't be checking Facebook. You wouldn't be surfing the internet if you are meeting with a potential new client. So take this time and set it aside and let's go to work on your law firm so that we can help you help more people and get more clients.

So having said that, RJon, are you ready to get started?

RJon: I am.

Scott: All right. So today's focus really is going to be on how to become enslaved by your law firm and really, how to break free from it. And so I've got a number of little points here that I'm going to ask RJon to just touch on. And he'll share with you why lawyers are inflating themselves by doing that, and then what you can do to break free and be different. So RJon, we'll start out with this one. It should be a relatively easy one. But one of the ways that lawyers become enslaved by their law firm is underpricing your firm's services. So share more with us about that.

RJon: Sure. Well, there is a concept called cost of goods sold. If you go to a restaurant, any successful restaurant -- years ago, we actually did a -- one of our live quarterly meetings, we have the executive chef of the hotel come and do a presentation for everyone. He brought a plate of food. And he took us through and showed us what is called in the restaurant business the plate cost; the cost of putting that plate of food in front of a customer. And he explained to us -- it was some sort of super dish, I don't remember. And he explained to us that the cost of the protein was \$1.50 and the cost of the starch was 75 cents and the cost of the vegetables was 50 cents.

I don't remember what the dish was, but I remember it had pistachios on it. And he said, "The pistachios are plus or minus a nickel." You add the pistachios, it costs nickel. Take the pistachios off, it's one nickel less in cost of goods

sold and put the plate in front of the customer. So then they know what they want their profit to be. They know what they want the profit of the restaurant to be, and they simply take the cost of the food, the plate cost, multiply it by their profit margin and that is the strategic way of arriving at the price for the services.

So when it comes to pricing legal services at your law firm, there's basically three approaches. There is the approach that most lawyers take, and most lawyers who take this approach don't get burned too badly, simply because legal services are so damn profitable. I mean, legal services are so profitable that you can actually do this blindfolded and usually come out pretty much okay by just going with the market rate. And that's basically you look around and you say everyone else is charging \$300 an hour, so I'll charge \$300 an hour because everyone else is charging \$300 an hour, that's why I chose \$300 an hour. And you just price your services at the market rate.

That is the worst way to price your legal services and causes you to become a slave to your law firm, but really more specifically, causes you to become a slave to the market because if the only way you think the prices or services is based on what everyone else is charging and no one else raises their prices, then you don't raise your prices, but of course your secretary needs to get a raise and the cost of gasoline goes up and the cost of insurance goes up and the rent goes up and cost of your kids' tuition goes up and everything in life goes up, but because the market won't move on the price on account of the fact that the market won't move on the price, on account of the fact that the market isn't moving on the price, you now become a slave, not exactly to your law firm, but you become a slave to all the lawyers around you. Scott? Scott, are you there? Can I hear? Can you still hear me? Scott, can you hear me?

Scott: Hey, I lost my signal there.

RJon: Okay. Well, now you're back.

Scott: I'm back now. I had to call in from a different line, so I apologize for that.

RJon: Well, I gave a great answer and you can go back and listen to the recording because it was

really good.

Scott: All right. I'll have to do that. So the other one -- I'm going to put these three together. And it's blame other for your problems, blame the economy or blame the clients. So how do solo lawyers end up falling into this pitfall and becoming enslaved and then what can they do to break free?

RJon: Well, it's not just solo lawyers, it's every adult. Solo lawyers are presumably adults. And pretty much, anytime that you blame another person for whatever is happening in your life -- and this is the part, of course, where people get all pissed off and bent out of shape and hang up the phone, cancel their membership and run away crying. But that doesn't change the fact that what I'm saying is exactly 100 percent true. Anytime you blame someone else for anything that's going on in your life, and I would include what's going on in your business, you are giving that person control. You're giving away your power. 100 percent responsibility equals 100 percent control. 100 percent control comes from 100 percent responsibility. For every ounce of responsibility you give away with blame, you give away an ounce of control.

Well, if your faith is dependent on my conduct, then you are my slave, right? But if your faith is dependent on your conduct and your choices and the choices you make and the decisions you make and the actions you take and you take responsibility for everything in your life, well then, you can never be enslaved by anyone because you take full responsibility. And if you choose to remain in a predicament or a situation that is untenable to you, then that's your choice because you can always leave. So anything to do with blame leads to you becoming enslaved by your law firm.

Scott: All right. And let's go back over to getting paid here. Another one is don't ask for retainers. Now, why do some not ask for retainers, and the obvious solution to that is start asking. So let me tee it off to you.

RJon: So yes, you already become enslaved by your law firm, don't ask for retainers. That's kind of the construct of the question.

Scott: Yes.

RJon: Well, first of all, you become a slave by -- when you don't ask for a retainer, you are essentially -- you've got more skin in the game than the client does, right? Because you have, as we mentioned earlier, the plate cost and cost of goods sold, you do have a cost of goods sold. There is a cost for delivering the services that your firm provide. Some of those costs are going to be hard costs, things you actually have to write a check for, be it court fees or filing fees or paying a secretary to work on a file. You could pay the secretary. The secretary isn't working for free. If your office costs you -- I'm just going to make this up. If your office costs you \$100 a month, which it doesn't, and you work 10 percent of your month on a particular client's case, well then you should allocate 10 percent of that rent to that client's case, which means you just paid \$10 to rent office space to work on that client's case. And that's a real cost of goods sold. And people who run highly profitable law firms pay attention to these numbers. And I'm not going to suggest that we all know to the penny 'cause we don't, but you pay attention to these numbers and we're aware of the impact and the effect that these numbers have on our business.

When you don't ask for a retainer, more specifically when you don't require a retainer before you begin working, you're basically extending credit and you're extending an interest-free, un-collateralized loan to someone who nine times out of ten, by virtue of the fact they're asking you for help in the first place, is probably demonstrating to you that they're not credit worthy. And then of course you have to work to their satisfaction before they will choose at their convenience to bestow payment upon you, and then you just become a slave to the business. You asked me why lawyers do that for themselves every single day?

Scott: Yes.

RJon: Fear, insecurity, ego. Fear, insecurity, ego is always behind the decision not to ask for and require a retainer upfront. I don't think it's stupidity. Lawyers are smart. It's fear, ego and insecurity. Maybe some stupidity. Maybe there's some stupid lawyers who just don't know any better. But I think everyone knows better.

Scott: All right, here's another one. Go to bar functions and commiserate with unsuccessful lawyers or go to bar functions and commiserate with unhappy lawyers.

RJon: You know, there was a study done and it's been quoted and cited so many times. I don't think anyone really remembers where it originated from. It could even be urban myth and there was never a study done. But I think we all intuitively understand that there's a lot of truth to this often quoted thing that your income or your net worth is going to be the average of the five people you spend the most time around. And there's nothing magic to that. There's a very practical reason why that tends to happen. And it's because we all have to agree on certain rules to get along, right?

So when you and I go out for dinner, we agree that going out for dinner means we go to a restaurant and not a hotdog card. And when you and I go out for dinner, we agree that it means sitting down at a table, not sitting down in a lunch counter. And when you and I go out for dinner, we agree on certain table manners and we agree on certain customs and we agree on certain understandings of how things work. True?

Scott: Yes.

RJon: Okay. If we didn't agree on these things, we wouldn't be able to go out for dinner on a regular basis because we just would have such a completely different set of expectations, understandings and standards. And so what happens is, when you hang around with someone who is broke and you hang around with someone who's having all kinds of problems with their business and they're just commiserating and they're bitching and complaining, but they're not really taking real, meaningful action to do something about it, it puts you in a difficult position. Because you either have to agree with the other person about their stories and their excuses and their explanations for why their business is doing so badly and, yeah, you're right, the economy is bad. Yeah, you're right, the clients don't pay. Yeah, you're right, law schools are graduating too many people for law school. Yeah, you're right, LegalZoom is killing

all of it. Yeah, you're right, the only lawyers who are making any money are the ones who are screwing over their clients. Yeah, you're right, those guys who are working and who are driving nice cars and living in nice houses and making a great living from their law firm, they're killing themselves to do it.

You either have to agree with all their stories or you have to call bullshit. Or you don't go back. Those are really kind of your three choices; right? There's a great song by They Might Be Giants called You and Your Racist Friend. And it's a story about a guy who's at a party and it's like, "I just can't tolerate being there with you and your racist friend. I don't understand how you can stand around and not call him on his bullshit. You either have to call him on his bullshit, punch him in the face, leave, or if you stay there and don't call him on his bullshit, it means you must agree with him on some level.

And that's sort of what happens when you're hanging around with a bunch of people who are whining and complaining about all these problems. You're either calling them on their bullshit, in which case, they probably don't fight you back, or you're not being around them, in which case, that solves part of the problem, or -- does that answer your question?

Scott: You've got it.

RJon: I realized I've not got the clearest answer, but I think I got the point across, right?

Scott: Yeah, absolutely.

RJon: And this is one of the great benefits of when people come to our live quarterly meetings and they come to our workshops and they're around hundreds of lawyers whose law firms are just growing and growing and more profitable and less hours and everything is better, and it's like, wait a second, I can either go back to my local bar association with all of my loser lawyer friends and agree with them on all the reasons why everything sucks, or I can hang around with this group of going on 400 solo, small law firm owners who have these successful, fast-growing, everything getting better and better all the time law firms. Which world do I want to live in? And that's part of the secret sauce of why our

members have so much success.

Scott: Right. Next one is don't use client grading.

RJon: It's just like school, A, B, C, D and F. I have a clear definition of what I consider an A member of How To MANAGE a Small Law Firm to be. I take one or two of those qualities or characteristics away and they become a B, like a boy member. And I take one or two of those qualities and characteristics away and they become a C. And then take a few more, they become a D. Take a couple more, they become an F. If you don't do this, then you will always be a slave to your law firm because even if you yourself can intuitively -- like pornography, I can't define it, but I know it when I see it, right? Even if it's like I can't define what A or B or C or D or F client is, but I know it when I see it.

Well, that's okay as long as you're by yourself. But the minute you try to hire someone to help you with marketing, the minute you try to help someone -- hire someone to help you with sales, the minute you try to hire an associate, the minute you start hiring people to help you to get some freedom from the day-to-day and any part of your business, if that person is not empowered with a clear criteria and a clear definition of A, B, C, D and F, you're setting that person up for failure right from the jump. And so what most lawyers end up doing is not hiring anyone to help them with anything because they know that these people are not going to be able to distinguish -- if you can't define for a marketing consultant or a marketing SEO person or a person who's going to shoot a video for you or a person who's going to write blog copy for you or do a newsletter for you; anyone who is presuming to say that they will, for a fee, do something that will feel prospective new clients to your door, if that person does not begin by insisting upon having a clear definition of an A, B, C, D or F client -- they don't have to use that term, obviously, but if they don't begin the relationship by saying, "You need to tell me in as clear as term possible what we're looking for and what we're looking to avoid," let me tell you a little tip here, run away. That's not a good person to be working with.

Scott: So just go deeper a little bit on this one because I would imagine that many of the people on the call haven't graded in-depth that way.

Suggesting, literally write down client, best client ever, client A and have a list of characteristics, follow it up maybe even by a list of questions by which you're able to ask that potential new client to get to, is this an A client? Is that sort of the process that you're talking through here?

RJon: I'm holding in my hand a statement of values for standards that we have with How To MANAGE a Small Law Firm. And I'm flipping to the page where we define an A member. Give me a minute. If anyone would like to get a copy of this for free, you can send an email to rjon@howtomanage.com.

Scott: Yeah, you can send it there or just reply to my email that I sent you earlier and I'll make sure you'll get it as well.

RJon: Yeah. We'll send you a hard copy, not even email. Here's one. Here it is. Firm policy. This is on page 43 of the handbook. Firm policy, number one, no assholes. Yes, you read that right. We have a grading scale we use to define an A client or member. These are the sort of people we love to work with, the sort of people who inspire being in my team, to go above and beyond on a regular basis. We also have our idea of what an F client or member is. These are the sort of people that the A members don't want to be around and neither do we.

There are two approaches to creating your own grading scale. One is to build up from F to A. The other is to define what's an A, and then as you remove certain positive qualities, characteristics or behaviors, you likewise demote the person until their conduct lands them on suspension and then eventually out of business with you. We enforce these policies to protect you and me and my team.

So here's what it means to be an A member in How To MANAGE a Small Law Firm in no particular order. We like working with you. You like working with us. You are highly motivated to have a successful law firm and all the benefits that flow from it. You have tangible and objectively quantifiable goals that really excite you. You respect my staff and appreciate my staff for the very challenging work they do, servicing and keeping hundreds of lawyers happy from all around the world.

You respond to the mistakes that we make in our business with the same grace and maturity that you would hope your own clients would demonstrate when you make a mistake in your business. You believe that the best investment you can make is an investment in yourself. You cooperate with, support, and at the very least, seek to understand the reasons for our policies. You are collaborative and intellectually generous with your fellow members. You have a good sense of humor, not easily offended by liberal use of the F word especially when it's so richly called for in an explanation.

You think it's really cool that my dog often works in my office with me, and that I often work from remote and sometimes strange places where there may be an occasional odd sound going on in the background. You do the work required to translate the lessons, tools, insights, ideas, templates and instructions we provide into tangible results in your life and business. You're honest with us, you're honest with yourself. You remain current on your financial obligations to us, and otherwise follow the rules we have established, which are designed to help all of our members get the best results possible.

You look for lessons, not problems in every situation. There's always a lesson. Sometimes we make it obvious, sometimes you get to find it for yourself. You are a positive person with a prosperity based outlook on life, no whiners, no cry babies allowed. That's our definition of an A member of How To MANAGE a Small Law Firm. And you know what? Every year when we sign someone up to come to our discovery day, which remember, the discovery day is free. You put up a \$1000, 100 percent refundable deposit, but it doesn't cost anything to come in the discovery day. And we sent out a FedEx package with a whole bunch of stuff including this full handbook. And there's policies in there. And every once in a while, we'll get someone who -- they will not -- no one has ever come out and said, "I'm an asshole. I don't qualify as an A member," but you can kind of tell that that really put them off, that policy, that definition.

And they say, "Do I have to come to the discovery day to get my deposit back?" And the answer, of course, is no. You don't have to come to the

discovery day to get your deposit back. And so they'll say, "Why don't you just give me my deposit back and I'm not going to come?" Okay. Good luck with your life. Here's your deposit back. The policy did its job.

Scott: It attracts those you want to work with, repels those you don't want to work with.

RJon: And makes it very clear for everyone of my staff, now if someone on my staff -- you know, I've got 40 plus people on my staff now, full-time W2 employees. Some of them I've known for a long time and I know them really well and they know me really well. They've been with me since the beginning, and others I don't know very well and really they don't know me very well. So this gives them protection. It gives them a vocabulary they can use. If they're having a negative experience with a member in any situation, they can come to their supervisor or their team leader or ultimately end up with me and would give them a way to articulate the problem they're having. Say, "You know, I'm having a problem with this member because they're really not very collaborative. They're not very intellectually generous with the group. Every time we have a meeting, they're always taking, taking, taking and they're never giving anything back."

And I'm not saying get off with that, I just say, "Okay, you're right. They're out." It gives us a vocabulary, it gives us a basis to have a conversation with the person on my team, and then it gives us a basis to go back to the member, him or herself and say, "Hey, you know, we're having some concerns that maybe you're not contributing as much as you're getting from your fellow members when you get together in groups. And most of the time, when we have to bring that to someone's attention, they're usually completely unaware of it, they're like, "Oh, everybody's thought of it that way and you're right. Maybe I was a little bit nervous," but it gets us into a conversation and we can focus on the issue and not make it a big thing about their personality or the person.

Scott: The next one. Avoid topics -- it would be closely related to this because there might be some conversations here, but avoid topics that may cause clients to be uncomfortable.

RJon: That's a great way to turn yourself into a slave in your law firm, is to avoid topics that may cause, or even if you know it's going to cause the client to be uncomfortable. You didn't introduce him to her who now wants to get a divorce. You didn't introduce them to or discourage them from seeing a financial planner and that's why they're now having to file bankruptcy. You didn't offer them that extra drink before getting in the car and sending them on the road, and now they need a criminal defense attorney.

You didn't cause their problem. You are in a position to potentially help them solve their problem. But we're not in the business of selling ice cream cones. We're not in the business of selling sunshine and roses. We are in the business of helping real people solve important problems in their lives and in their businesses. And very rarely are those important problems unaccompanied by difficult issues and difficult questions and uncomfortable conversations.

So the lawyer who is trying to get all his or her clients to like him, "Oh, I want all my clients to like me. I can't stand it if they don't like me. I wouldn't want to be uncomfortable." Well, how are you going to have a conversation with someone about their estate plan, a meaningful conversation to really help someone make important decisions about their plan with regard to their estate plan without talking about some uncomfortable topics? How are you going to help someone have a real meaningful conversation about their plans around their divorce without engaging in some difficult discussions? How are you going to help someone find the clarity to prioritize their choices so that they give you the money that you need in order to save their life rather than giving the money to buy a big screen TV or take a vacation or something that's not really going to make a big difference in their life?

How are you going to ever help someone make really meaningful choices in their life if you're more concerned about them liking you and you're afraid of bringing up anything that's uncomfortable? You become a slave to your firm, more specifically, you become a slave to the client and you essentially end up becoming their enabler because they start telling you how to represent them instead of you knowing best. You're the professional, they are not.

Scott: About taking your work home with you.

RJon: Well, I mean, that's pretty obvious. You take your work home with you, you become a slave to your law firm 'cause you're just working all the time. I have an office at home, but my office at home has a door. And when I'm not using it, the door is closed and I'm not in it.

Scott: I'll tie one close to it. Do not create delegable systems, checklists or processes.

RJon: Well, that kind of goes back to what we were talking about earlier, if you don't define what an A client is, you can't really delegate any marketing tasks. You can't really hire anyone to meet with prospective clients, to decide whether or not to accept an engagement from them. You'll have a very difficult time hiring an associate and delegating a case to that associate if you don't have a clear definition of an A, B, C, D or F client. And similarly, if you don't systematize, if you don't create a system for how you want files to be opened, for example, well then you can't really delegate how files are supposed to be opened and you end up having to be the one who opens up all the files, notwithstanding the fact that a good secretary can open up a file. You don't have to go to law school to open up a file if you have a good system that you could follow to open up a file.

But if you don't create that system, then you end up having to do everything yourself because you're the only one who could read your own mind and you'll become a slave to your firm pretty soon. And then what's worst, more business, which everyone wakes up and like, "I want to grow my law firm. I want more clients." Well, more clients just ends up being more enslavement if you're the one who has to do everything because you won't or don't know how to and won't learn how to create systems. Or if you have learned, won't make it a priority and set some time aside every month to build -- just build one system per month. In a year, you'll have 10 systems built. And it will be 10 times better than how it is now. Are we going to do Q and A this month?

Scott: Yeah, we are. I've got just two more left and then we're going to go to Q and A. The

second to the last one I've got is deceive yourself as to how you really want to be living so that your goals can never inspire you.

RJon: Man, that is depressing, but so common. The question is -- first off, the premise is, the law firm is supposed to work for you. You are not supposed to be a slave working for your law firm. The law firm is supposed to be your tool, your vehicle. It's supposed to work for you. And if you want it to work for you, you got to have some goals. How much net income do you want this law firm to generate for you? How many weeks off per year do you want to take? How many of those weeks do you want them to be consecutive weeks in a row instead of just spread out all over the place. What kind of impact do you really want your business to help you make in this work? What kind of dent are you trying to have on this universe?

When you check honest goals -- and let's just use numbers, let's use money as an example, not because it's the most important, it's just the easiest to quantify. It's the most objective and easiest to quantify. You determine that to live the way you want to live costs, let's just say, for example, \$1 million. You need \$1 million before taxes -- that's around \$600,000 after taxes, around \$50,000 a month after taxes, to live the way you want to live. Okay. Great.

And let's say you build out your business plan and you're determined that your law firm will operate at, let's just say a 25 percent profit, the total owner benefits, your normalized salary, your profit distributions, all the expenses you'll run through the business, blah, blah, blah. Let's just say, to keep the math easy, that it's 25 percent. All right. Well, you need a million dollars before taxes and your business is going to run on 25 percent profit margin -- or you can do the math. Everyone can do the math. That means your firm needs to gross \$4 million. All right. Well, if the firm is going to gross \$4 million and your average widget that you're going to sell; your average case, your average matters, your average client, is, let's just say for argument's sake, \$4,000.

So I'm taking my calculator, I'm putting \$4 million divided by \$4,000, means that the firm has to services 1,000 files. 1,000 files at \$4,000 a file is \$4 million. 1,000 divided by 12 months is 83

per month. So 83 files per month at an average value of \$4,000 is a thousand files a year. It's \$4 million in gross revenue, 25 percent profit margin gives you a million dollars before tax income.

Now, you could build a marketing plan. Now you know whether the sales is on track or not on track. Now you have an idea of how much staff you need or don't need. Now you know how much space that staff needs to sit in. Now you know how many computers the staff needs to work on. Are you seeing where I'm going here, Scott?

Scott: Yes. Yeah.

RJon: But if you start off with a lie and you say, "I don't need \$50,000 a month to live the way I want to live. I can settle for \$25,000 a month. \$25,000 a month will get me everything that I want." But it's not true. The truth is you need 50,000. And there's no right or wrong number. I'm just making a point. Well, if you tell me that you really need \$25,000 a month to live the way you live, then I'm going to say \$25,000 a month to live the way you really want to live, at a 25 percent profit margin means the firm needs to gross \$100,000 a month. You see where I'm going with this?

Scott: Yeah.

RJon: We're just going to come up with a completely different model, and since the model is based on a goal that isn't real, it doesn't matter to you. And if it doesn't matter to you, you're not going to ever really break free of all your excuses and stories and bullshit to make it happen. And pretty soon, you start believing that it's not possible to accomplish even \$25,000 because \$25,000 did inspire you in the first place, and you start becoming a slave to the idea that it's not possible to build a highly successful law firm, when maybe the problem is you never set a goal that actually matter to you to begin with.

Scott: Last one here, confused cause and effects.

RJon: Oh. Well, look, I mean, we live in a universe that operates in a pretty understandable way. Causes lead to effects. Effects don't just show up, they're out there being a cause. If your firm has steady, reliable, predictable cash flow, that

is an effect. The cause or causes of that effect has to do with marketing and sales and having a business plan and probably having a marketing budget and probably having key performance indicators and other measurements that you pay attention to little by little by little by little so it all adds up to get you where you want to go.

But if you get distracted by the effect, “Oh my God, I don’t have any money. I don’t have any cash flow.” And what people end up doing is they end up saying, “I don’t like the effect that I’m experiencing and therefore, I’m disempowered to do anything about the cause.” And as soon as you turn that around and have it like that, you basically just become a victim of everyone around you. You become a completely disempowered person. Forget about a lawyer and a law firm and a business, you just become a disempowered human being when you start thinking that effects precede causes. Very topsy-turvy confusing world to live in if you think that causes are independent -- I mean, that effects are independent of causes.

Scott: Good stuff, man. All right, I want to invite our operator, Stephanie, on the line. Stephanie, if you’ll come on the line and give everyone instructions on how to go into our Q and A.

Stephanie: At this time, to enter the question queue, press star 1 only once. If you press it more than once, you will remove yourself from the question queue.

Scott: Okay. So if you have a question, press star 1 and your phone line will be isolated with our operator, Stephanie, and Stephanie will bring you on the phone line. You’ll be able to ask your question directly to RJon and be able to get clarification on it. Meanwhile, everybody else will be able to hear your question and learn from your question and RJon’s reply. So if you have a question, only once press star 1, only once, and your phone line will be isolated and then Stephanie will bring you on the line. We’ll give Stephanie just a moment. And Stephanie, when you’re ready, you can bring on the first question.

RJon: Scott, are people pressing star 1?

Scott: Yeah, we’re giving Stephanie just a little bit of a moment here. She must be taking some

questions in the queue.

Stephanie: I do have a question from Peter. Your line is now open.

Peter: Hey, RJon, we’re having a little bit -- I guess I’m talking about, I guess, an effect or a problem of a lot of prospective new clients call in, but let’s just call them too low income level oftentimes. And just thinking of solutions, how to slightly upscale our clientele. I mean, just sort of brainstorm I’ve had have been things like, you know, are we screening our potential new clients well enough so they’re not getting attorney time, sort of a staff person. Should we be doing paid potential new client meetings? And also just looking at kind of where our clients are coming from, and should sort of the marketing sources be a different sort of mix. Are we getting too much of the Google search and stuff that might sort of too many shoppers.

RJon: What do you do?

Peter: We do divorce and child custody work in Chicago.

RJon: Divorce and child custody in Chicago. All right. The effect you’re experiencing is what? That prospective clients call your firm, ask the price, you tell them the price and they say that’s too expensive and they hang up, more or less is that how it goes?

Peter: Yeah, or even they get in, they get to the stage of where they’re doing a prospective call or a prospective in-person meeting with an attorney and basically wasting our time oftentimes, just due to inability to pay and in no chance they’re a prospective client.

RJon: Well, first of all, I would suggest you stop taking this, a waste of your time to help give someone information, education and clarity. I’m not saying that could give you a hard time, I’m just saying that attitude cannot seep into everything you’re doing with your prospective clients. You know what I’m saying?

Peter: Absolutely, absolutely.

RJon: Okay. So the prospective client calls the office, they schedule an appointment, they show

up for the appointment and you eventually give an appointment, you tell them the price, and they say, "That's too expensive," and then they leave.

Peter: Too often, that is happening, yes.

RJon: Okay. What are you doing to pre-qualify or pre-educate the client before they'd get to that appointment?

Peter: Part of it might be a near-term issue where we've had a little staff flux with our sort of receptionist, salesperson, meaning we had a full-time person and then we've had a temp handling the job and now we're about to rehire somebody. So that might be a little bit of a near-term problem.

RJon: Do you have a script?

Peter: Yes, we do.

RJon: So when the person quit who was in there for a while and they were replaced by the temporary person, how did you introduce that person to the script? Did you give that person the script and say, "This is the script. Follow it"?

Peter: They have the script. I would take accountability for sort of the idea that when you're having the temp person and we're going to have a permanent person fill in the role in two weeks, I'm probably not giving as much attention or training to the temp that maybe I can or could have. But I mean, going forward --

RJon: Why don't you just tell all of the marketing vendors, "Listen, turn off the marketing for two weeks. We've got no one here to be qualified to speak with prospective new clients." Save yourself the money of having a temp. Catch up on all of your legal work. Maybe go on vacation. And then when the permanent person shows up, put the sales back on, go back into business because that would have been less expensive than the approach you took.

Peter: Yeah, understood, understood.

RJon: All right. So problem number one, which is leading me to believe I understand what the cause is, is you have -- you removed any pre-qualifying exercises before people were being

scheduled for appointments. Now, that might be one of the causes. Next question, what is being done to pre-qualify, pre-educate the client, prepare the client or prospective client from the time that they scheduled the appointment until they actually show up for the appointment? Take me through that process. I called the office. I've said whatever I said. You booked me for the appointment. First off, emergency, what's the soonest I can ever get in?

Peter: Next day.

RJon: Okay. So you don't really have a system created that gives you any space to do a lot of pre-qualification or pre-conditioning or pre-education because some people are coming in the next day, some people are coming in two days, some people are coming in three days. There isn't really a systematic process that people are going through, I gather, from your answer. Is that correct?

Peter: That's absolutely correct, yeah. I mean, in terms of when I would describe us as doing it better, it would simply be better verbal pre-qualifying in that initial call with the staff person who's going in to, "Hey, tell me about where you're living and where you're working," so you're at least ascertaining, you know, let's just call it basic demographic things. And then you're also giving them a little line, "Okay. Here's where our retainer start." Oftentimes, that will elicit things about -- you know demographics in a neighborhood or a suburb and you know this person works as X. And when you say, "Hey, 1750 or 2500, 5000," and it's like, "Oh, no, no," then it's a pretty -- so that's the only level of pre-qualifying we were doing, I would say, even in, let's just say, the better model that honestly, yeah, I haven't even been following as well as I should have been the last month or so just due to some of the staffing stuff.

RJon: Are you open to some feedback about your "better model"?

Peter: Yeah. That's absolutely why I'm on the call.

RJon: It's not a system. You haven't created a system. You have someone on the phone who asks some more or less random questions about the person's area code or ZIP code or

neighborhood they live in or the job they have. And based on that, you consult with your crystal ball to determine their ability to pay. And that really short-circuits the entire process.

So step one -- I mean, I can go through and ask you five more questions and we can just eviscerate your entire system, but I'm not here to make you feel that or to embarrass you. You've given me enough information. If you don't mind, I'll just prescribe the best solution for you.

Peter: Absolutely. That would be great.

RJon: Okay. Step one, have a script.

Peter: Okay.

RJon: Actually, before you even get to step one, your marketing should be education-based marketing. So for example, prospective new members -- when a person contacts my team to schedule an appointment, you can go to howtomanageasmalllawfirm.com/appointment. Everyone on the call can go there to see what it looks like. You all can schedule an appointment if you want to, but go to howtomanageasmalllawfirm.com/appointment. And when you get there, there's, first of all, a video with a bunch of our members talking about what it's like to be a member.

So right from the get-go, you kind of have an idea what you're looking into. There should be no big surprises what this is all about. Once you schedule the appointment, you can never get an appointment the same day. You always have to wait a couple of days to get an appointment, not because no one's ever available the next day, sometimes people are available the next day, sometimes they're not, but the point is we need to have a systematic, consistent experience for all prospective new members. So when you schedule the appointment, you get a confirmation email, and then you get a video with answering frequently asked questions.

And the frequently asked questions that you get are designed as much to get you to cancel the appointment as they are designed to get you excited about your appointment because they answer questions about a whole bunch of different things that we want or need you to

know about so we don't waste your time having a call with us. Notice the attitude? I don't want to waste your time having a sales call with someone from my team if I can answer some questions for you that you can use to disqualify yourself. I don't have an attitude of, fuck you, I don't want you to waste my time.

Peter: Sure.

RJon: Completely different attitude. All right, next, when the prospective client comes into your office, in my case, 99 percent of the time is over the phone, prospective new member, is they have a sales call, like a real, actual consultative sales call. So when someone from your team is meeting with your prospective new client, how does that conversation go? Is there a systematic way that that conversation always or almost always goes?

Peter: Once the person's here?

RJon: Yeah, the person is in your office.

Peter: Yeah. No, I got it. We have a sales agenda that one of my assistants does a piece of it, and then I usually do a piece of it.

RJon: All right. Take me through it.

Peter: The five bullet points, without looking at it, are, you know, step one being, hey, little client rapport, talk about the preparation we've done for the meeting, talk about our team a little bit. Step two, this is usually a non-attorney doing it, basically fact exploration, time to get that stuff out of the way before an attorney is meeting with the person. Step three, future orientation, what's kind of the future picture you want a new client want to have created or get to with our help, kind of thing.

And then step four being just sort of a story piece, hey, here's what we did with another client that was in this situation. Once they hired us, here's what happened. And then I guess step five being, here's our solution, apply to your situation, and just kind of a close piece for step six.

RJon: All right. Two of our five steps are not bad. And two of your five steps are bad. And one of your five steps is bordering on dangerous.

Peter: Okay.

RJon: The two parts of your system that are not bad are the parts that actually help the client articulate and get clarity about where they are. Are they, in terms of their time, their money, their reputation, where are they right now in their life. And the other part of your system that's not bad is the part where you talk about where you help them future vision, what are you hear to try to accomplish, what does this better life look like? All right?

Peter: Okay.

RJon: The part that is pretty bad is the part where you talk about your firm and your credentials and all that kind of stuff in the beginning. And the other part that's pretty bad is where you talk about all the different stuff you've done to help other clients who are similarly situated. Because the client, for the most part, doesn't care about any of that because they're there for their own problem and their own reasons because their number one concern is their life, not anyone else's.

And then the part that's bordering on dangerous is the part where you have a non-attorney talking about, "This is what we think we can do for you," because if you're not careful, that could easily slip in to the unlicensed practice of law. And I must rather have you following a very, very different system, which, as a member of the digital program, you actually have access to recordings where we teach a much, much more effective system, which is much more professional, much more profitable, much more comfortable, does not expose you to nearly as much risk as yours does. And many, many, many of our members, I don't know, hundreds of our members, it seems like it, have non-attorney salespeople who are executing this very, very effectively.

\We actually have a sales workshop coming up on June 1st, 2nd and 3rd. We have a sales competency workshop, which if you're interested, you can come to. And we also have another workshop on April 28, 29 and 30th where we actually have a couple dozen of our members who are bringing their non-attorney salespeople, and we're training the non-attorney salespeople how to sell legal services very effectively. And

anyone who's a member of digital, you can get a ticket to those at member prices. Everything comes with a hundred percent money back guarantee also, so you got no financial risk, and all you got to do is claim the guarantee before the workshop is over. Don't wait 'til it's over. You go home and you bitch and complain that you didn't get your money's worth.

While the workshop is still going on, if you don't feel like you're getting your money's worth, you let us know, and if we can't make you happy, then we'll give you a refund. So you got no financial risk there. And like I said, as a member of the digital, you can get a spot at the same price that regular members can get. If you are not a member of digital, it would be at least 20, 25 percent higher.

Peter: Okay.

RJon: Is that something you think would benefit you?

Peter: Yeah, I do. I mean, honestly, we've started using non-attorney more based on some of your previous coaching, but I guess we're not quite implementing it to the ideal yet.

RJon: What is your average case or matter potentially worth for you?

Peter: Average in 2018 was 5500.

RJon: 5500?

Peter: Yes.

RJon: All right. And what is your current conversion rate?

Peter: Well, I don't think I have my annual memorized. Just looking at February, we've converted 4 out of 17.

RJon: 4 out of 17. That's not good. 4 divided by 17, you know that's not good, right?

Peter: Yeah.

RJon: That's like 20 percent. Okay. So if you could increase that 20 percent, even suggest 30 percent, not a huge increase in terms of the

numbers, but that would be two extra clients a month. That would be an extra \$11,000 a month. That will be an extra \$125,000, \$130,000 a year in revenue. What would that potentially do for your business and your life?

Peter: It would -- well, you know, there's definitely -- speaking to some of that goal and lifestyle stuff. There's definitely a home we're looking at to get to that I'm very focused on getting to. It would help me get there. It would help me and the business, I would say, to get myself out of the work production a lot more by bringing in another work production person 'cause I feel like my hands are a little bit too much in the work production even though I'm the owner of the firm.

RJon: The house you're looking to buy, how much is that house?

Peter: 350,000.

RJon: Okay. And the house you're in now, how much equity do you have?

Peter: 40,000.

RJon: 40, 50, 60, 70, so you need around \$35,000 or \$40,000 to make the gap between the equity you take out of your current house and the down payment on the \$350,000 house. Is that about right?

Peter: Yes.

RJon: All right. And then what are your current payments on your house?

Peter: \$1300.

RJon: Okay. So your payments are going to go up from 1300 to about 2600.

Peter: Mm-hmm.

RJon: Is that about what you figured?

Peter: Yes.

RJon: So you need \$40,000 for the down payment. You need an extra \$1300 a month for the monthly carrying cost for the new house.

How do you feel being in the house you're in now as compared to the house you want to be in? You'll notice, by the way, I'm doing exactly what I teach you to do. I'm doing this in slow-motion, so there's no tricks, you don't feel like you're being manipulated. I'm literally demonstrating by walking you through these questions how the process works.

Peter: I mean, basically, I don't like the environment we're in. I actually was listening to one of the mindset pieces in your app and really was trying to get much more future-focused. And I think one of your things in there was talking about your progression and really kind of getting that vision out there for myself to really have that goal out there that I'm excited and motivated about. So my wife and I are out of this two-bedroom condo on an alley and the place we want to move to is basically on the beach over in the Indiana dunes, on Lake Michigan.

RJon: So how do you feel every day when you wake up in a two-bedroom condo in the alley?

Peter: I mean, a little depressed.

RJon: It's obviously not that bad since you're still there.

Peter: Pardon?

RJon: I said it's obviously not that bad since you're still there. If it was really horrible, you wouldn't be living there. So it's not like you're living in the worst thing ever.

Peter: No, no.

RJon: But really, honestly, be honest, how do you feel living in -- no one knows your name. I don't even remember what you said your first name was. All we know is you live in Chicago in a two-bedroom condo in an alley.

Peter: Yeah.

RJon: So you said your name is Peter. I remember that.

Peter: Yeah. I just feel just a little sad that we haven't kind of upgraded 'cause we've been in the same place for 13, 14 years now.

RJon: Yeah, that's interesting you used the word "sad." I've had conversations with hundreds and hundreds and hundreds, maybe even thousands of lawyers about where they are now versus where they want to be. And that is an interesting word. What about it makes you sad? Why do you say sad? Some people say they're disappointed, some people say embarrassed, some people say angry. "Sad" is not a word I hear very often when it comes to where they live.

Peter: Well, you know, I'd like to be providing a better life for my wife. Let's just look current situation, I'd like to provide a better life for her and I where she's not waking up in a dark place on an alley, but rather just a place that -- 'cause quite honestly, even nuanced individual stuff, she's affected by darkness. It's too dark. There are people who kind of have that seasonal affective disorder and she's got some of that. The idea of just having even an east-facing window, facing out over Lake Michigan versus an alley would upgrade our lives just based on that simple fact alone, and I'm disappointed in myself that I have not made that happen to date.

RJon: Why are you disappointed in yourself?

Peter: I know I'm capable of running a bigger and better and grander law firm than I've been doing the last half dozen years.

RJon: So if you believe that you're capable of it and you seem to have a desire to have the benefits of doing so, why haven't you been able to run a bigger and better and grander law firm? You could take a guess. What are you guessing might be the reason?

Peter: When I look at some of the things that has held back our income in recent years, it's maybe underpricing our services at times. And really, until I signed up for the All-Digital Coaching Program, I don't know, September, October or whatever, I feel like that's helped me. Some of your resources on the app and just the coaching calls and stuff, just really understanding -- getting a better understanding, obviously, based on my question, it's not quite there, but just really being much more aggressive on the sales and marketing piece, that whole sales flow needs to be a lot better.

RJon: Why do you think you are where you are now instead of where you want to be? I mean, you seem like a pretty thoughtful self-aware kind of person.

Peter: Yeah. I think I've been challenged, I think, to get past, sort of a little bit of a -- I would just call it a little bit of scarcity mindset, sort of an undervaluing our legal services, vis-à-vis, the quality that we actually bring to the table; myself and our team and stuff like that.

RJon: So do you think that the big challenge that you've got that got you living in a two-bedroom condo on an alley without an east-facing window, that you don't like being in, you think the challenge that has you living some place that causes you to wake up feeling sad? Do you think the challenge that has you feeling like you wish you could provide a better life for your wife -- these are all your words, not mine, right?

Peter: Absolutely.

RJon: That prevent you from being able to build a bigger, better, grander law firm, do you think it has mostly to do with your mindset, or do you think it has more to do with just not having the technical skills on how to run a profitable law firm? Or do you think it might be something else?

Peter: No, I don't think it's something else. I think it's probably mindset first, and I mean, the other stuff, yeah. I'm sure if you looked at how we're doing everything and just different processes, there's definitely some upgrades. But when I look in the rearview mirror, I just think back at times, it's like -- when I'm looking at stuff to correct myself and kind of get some big goals in front me at the start of this year that we made and some of these things, like picking out a house we want to be in, I've been trying to really get out of that -- basically create a future vision and a picture and kind of like have this future, living as if I'm going to be in that in the future rather than kind of mired in some of this past junk. I think it's mostly mindset kind of stuff that I'm trying to still overcome.

I think in a lot of ways, is the right word technical or just the -- the how to is almost the easier part

versus really kind of the world view mindset. Sometimes that's tough stuff to change, whereas -- I mean, I could look at somebody, the How To MANAGE stuff, or other products where it's like, how to do your books, how to do different things, whereas the kind of getting your mind right, that to me, I think, has been more challenging for me.

RJon: All right. So now we're going to shift gears in the conversation because so far we've been understanding all about where you're at and why you're there and why you think you're there and how you feel about being there. Notice I haven't said a whole bunch of stuff about myself yet.

Peter: Okay.

RJon: Now, we're shifting gears. We're talking about, can you imagine what it would be like to be living in that \$350,000 house? Being able to provide a better life for your wife, being able to give her an east-facing window with sunlight, being able to build a bigger, better, grander law firm that's priced appropriately where you could start to get out of your scarcity that -- could you actually bring yourself to believe that that's possible for yourself?

Peter: Yes. Yes, I can.

RJon: How do you imagine it would feel like if you could wake up in a house 24 months from now?

Peter: I mean, I think sort of my whole daily continence would be just a lot better, not to use just simple, emotive words, but just more of a happy, joyous, life versus a little bit more of a dreaded, "Oh, crap, there are all these people in our building who --" I don't mean this -- this sounds bad, but this isn't the environment and the sorts of people we should be living around as a successful law firm owner, and yet I've allowed myself to kind of stay in it versus -- it will be great to walk out onto the beach and just sort of -- I think it would uplift so many parts of life. I think it would be kind of like just being healthier, stuff like that. There are parts of life that just help all of your areas. If I'm healthier fitness wise, it helps every part of my life. If I'm living in that better environment, I would guess that would be very similar. It helps all areas of my life.

RJon: Okay. So where you are today is you've been running your law firm for more than 10 years, and where it got you is living in a two-bedroom condo on an alley with no east-facing window for your wife. You're feeling a sense of dread, it sounds like, being around people who are your neighbors. It's not about living that way. It sounds like you recognize that being in the environment you're in is contributing to your scarcity mindset 'cause that's all -- you're around a bunch of people who are broke. And you believe that it is possible with, it sounds like the right help, to be living in a \$350,000 house with an east-facing window, you can go out to the beach, where you can feel daily happy, joyous life through the bigger, better, grander law firm, not feel sad, feel proud of yourself -- I'm using the word "proud of yourself," but I imagine that's probably accurate, for being able to give your wife a better life. That's the long and the short of it?

Peter: Yes.

RJon: Okay. So how motivated are you to go from where you are now to where you say you want to be? Let's just say on a scale of 1 to 10.

Peter: 10.

RJon: Okay. So write down my email address.

Peter: Okay.

RJon: And as soon as we are done with the call, send me an email with your phone number. I'm going to call you right back and I'm going to get you to sign up to come to our discovery day. It comes with a 100 percent money back guarantee on the setup fee. So basically, the discovery day is free. There is no charge to come to the discovery day, but we do require a \$1,000 deposit, which will be applied as your setup fee.

When you get to the discovery day, listen to how the entire program works from top to bottom. So we're going to lay out the whole thing for you top to bottom. You'll meet dozens of members of my team. You'll meet hundreds of our members around the country, many of whom will tell you that they felt very similar to the way you feel now and how their life is better now. You and your wife can come and ask a million questions and

conduct real due diligence, I mean, really, really dig in and conduct your due diligence, ask all the questions you want.

And at the end of that whole discovery day, if at the end of it you say, “No, this is not for me. I want to go back to my two-bedroom condo on the alley with no east-facing window,” you go to the back of the room, you say, “I don’t want to do this,” and you turn in your badge, and we would refund you the setup fee because obviously, we don’t need it since you’re not engaging our services.

On the other hand, if you’re like most people who come to the discovery day and you say, “Holy crap, this is amazing,” and you see all of the success stories and it all makes sense to you -- there’s no rocket science. It’s very simple what we do for people, just very basic stuff. We work on mindset, we work on each of the seven main parts of your law firm. We provide an outside CEO and we walk you through all the systematic, proven approach that we use. If at the end of the discovery day and you feel confident that this is the right decision for you, then you’ll engage our services, you’ll stick around for the live quarterly meeting, which will take place on that Saturday and Sunday. And then you’ll be assigned to a crash course group and you and your crash course group will spend every week for the next 12 weeks going step by step by step by step building a better law firm.

And most people just completely transformed their law firms and their lives even just in the first 90 days. And what happens after that and after that and after that and why it works and how it works and what we do, where we do it, how we do it and all that kind of stuff is really why we have the discovery day.

To come to the discovery day, like I said, costs nothing. We just require a deposit for the set up fee, which is 100 percent refundable. And just to make this really, really simple for you and really, really simple for me and my team, in the event that you come to the discovery day and you decide this is not the right thing for you, not only will we of course refund your set up fee, but you can come out of pocket for up to \$500 to reimburse you and your wife for travel expenses just to make this a really simple decision for you.

You understand why we do that?

Peter: Yeah.

RJon: Yeah. Because anyone who has a problem making the decision to come with a hundred percent money back guarantee and we even come out of pocket for travel expenses is basically telling me they’re not going to be prepared to do the work that you got to do to transform your law firm. So that doesn’t sound like you, does it?

Peter: No. I’m ready to take things to a different level. I’m tired of where we’re at right now.

RJon: Okay. So my email is R-J-O-N@howtomanage.com, rjon@howtomanage.com. Just send me an email with your name and phone number and I’ll call you right back as soon as we’re done with the call here. I want everyone to recognize -- and don’t say your last name ‘cause so far, the only thing people know is your name is Peter, you’re a lawyer in Chicago. There’s a million Peters in Chicago and probably a thousand of them are lawyers. So you’re basically anonymous at this point. But I want you to recognize, is this or is this not exactly what I teach on the program on how to sell?

Scott: It’s exactly.

RJon: It’s exactly, right? I mean, we didn’t ask, is this still a good time to speak? And I didn’t confirm, I didn’t assure you that everything would be kept confidential ‘cause obviously, we’re on a phone call. I just ask you to keep your name private. But we went through where you are now in terms of your time and your money and your reputation. I didn’t answer you that explicitly, but I covered all those points, didn’t I?

Peter: Right. Yes.

RJon: And we went over why you think you are where you are today and you shared with me a little bit about your mindset, you shared with me a little bit about your environment, with your neighbors and all that kind of stuff. And then I asked you where you want to be, and you described for me where you wanted to be. And I just kept repeating your own story back to you.

I’ve had people, when I’ve had these

conversations with them, I've had these people literally say to me, "I am so angry with you right now, but I have to admit, all you're doing is repeating my own words back to me. So I guess I'm really just angry with myself and I should probably do something about it then." Your words are much more powerful to you than my words. Like, I would have never in a million years chosen the word "sad" or "contenance" or "happy, joyous life." That's just not my vocabulary. That's your vocabulary, which is why it's so much more effective when I use your vocabulary back to you.

Peter: Right. Yup.

RJon: And this is why when lawyers spend all this time on sales calls or their staff spends all this time on sales calls with prospective new clients talking about the firm and our credentials and our success stories and our history and where we went to law school and blah, blah, blah, it just bounces off the other person. They don't care. But when you take the time to understand where the person is and then repeat their own story back to them, they can't get enough.

Peter: Right.

RJon: So I hope that was a valuable lesson for everyone. And I hope you do send me that email.

Peter: Great. Thank you for the answer.

RJon: You're welcome.

Scott: All right. Thank you, Peter. And RJon, we do not have any more questions at this time.

RJon: Good 'cause I'm out of time.

Scott: I know. So I want to thank you for your time and thank you for sharing with us. And also, like I mentioned before, when Peter asked this question, it's a great opportunity to learn from other people's question. The process that you just heard RJon go through with Peter is the exact same process you can be having in your law firm. So RJon, thank you, and we look forward to our next call. I want to thank our operator, Stephanie for handling everything in the background there with the recording and the queue and everything. And I'll get the recording posted in

your membership site as soon as possible. And RJon, have a great rest of the day, man.

RJon: Thanks Scott, and thank you, Peter. I look forward to receiving your email. And everyone, I'll see you on the discussion forum.

Scott: All right. Have a good one.

RJon: Bye-bye.

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