



The 14 Building Blocks Of a Million-Dollar Practice

Presented by
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President and Master Practice Advisor
8:30 a.m. to 4:30 p.m.

8:30 – 8:40

I. Welcome

10 Min

- A. Personal Introduction
- B. Purpose of today's program:
 - 1. To identify, exercise and build new skills to increase your revenues and make your practice secure for the future.
 - 2. To help you identify missing skills
 - 3. To show you how to transform your practice into a successful legal business
- C. Curriculum
 - 1. Productivity
 - 2. Client Development

8:40 – 8:50

II. Background

10 Min

- A. Growth in number of lawyers
 - 1. Nationally
 - 2. State
 - 3. Percentage who will ever see a lawyer
- B. What Law School taught you
 - 1. The Law School Model – the Guild
- C. The Legal Craftsman Trap
 - 1. The work is everything.
 - 2. What isn't the work is resented
 - 3. Controlled by external forces
 - a. No work plan except "get the work done!"
 - b. Always fighting deadlines, crises, stress & overwhelm
 - c. Practicing Door law
 - d. Working too many hours
 - e. Not billing enough
 - f. Multi-tasking

- g. Not using support resources well
- h. High receivables, low realization
- i. Afraid to take a vacation, afraid to come back from one
- 4. The craftsman is boxed in
 - a. The craftsman doesn't have a business – they have a job.
- D. What Law School DIDN'T teach you
 - 1. How to set up and run a business
 - 2. How to organize and maximize the use of your time
 - 3. How to choose, manage and utilize support staff
 - 4. How to attract clients
- E. The Evolution of a Business
- F. The Evolution of a Law Practice
- G. Exercise: How to identifying missing productivity skills

8:50 – 8:55

III. Becoming a Master

5 Min

- A. The four attorney roles in a successful legal business
- B. Develop a new level of skill – in MANAGING yourself and your team.
- C. Move from operating on “Customs” to operating on “Systems”
- D. Focus on “the business” not just “the work”
- E. Learn to operate at your highest level of expertise and value
- F. Build a BUSINESS that has intrinsic value –
 - 1. A Golden Book
 - 2. An infrastructure – systems & procedures
 - 3. A strong team
 - 4. A business not 100% dependent on you to deliver the services.
- G. The alternative: remain a commodity. A craftsman, making pots, and interchangeable with thousands of others
- H. How to recognize missing skills

8:55 – 9:00

IV. The Seven Building Blocks of High Productivity

5 Min

- 1. Practice Focus
- 2. A Golden Book
- 3. Control Of Your Time
- 4. A VALUE Perspective
- 5. A SYSTEMS Approach
- 6. Leverage
- 7. Client Education

9:00 – 9:10

V. Building Block One: Practice Focus

10 Min

- A. Difficulties of handling diverse matters
 - 1. Specific training & research
 - 2. Maintaining current forms
 - 3. Staff expertise
 - 4. Costs related to research, etc.
- B. Lower efficiency – effective rate
- C. Higher risk of errors & malpractice
- D. Higher stress

9:10 – 9:25

VI. Building Block Two: A Golden Book

15 Min

- A. Common beliefs
- B. The golden client
- C. The “F” client
- D. Why do attorneys knowingly take “F” clients?
- E. The reality – 80-20 rule
- F. The cost of “F” clients:
 - 1. Disproportionate time demands
 - 2. Long hours, nights & weekends
 - 3. No time to market or manage
 - 4. Too little time to take care of good clients
 - 5. Stress, frustration & overwhelm
 - 6. Dislike of the practice
 - 7. Stressed & lost staff
 - 8. Deals, write-downs, write-offs
 - 9. Poor realization rate
 - 10. E-mails from upstairs
 - 11. Grievances
 - 12. Malpractice suits
- G. The solutions
 - 1. Create a SYSTEM for client intake
 - 2. When in doubt –
 - 3. Turn down “F” – or suspected “F” clients!
 - 4. Sometimes – “F” clients can’t be avoided
 - 5. Identify existing “F” clients & FIRE THEM!
- H. A special note to partners on behalf of associates
- I. The most important step – STOP DRAGGING YOUR PRACTICE DOWN WITH “F” CLIENTS!

9:25 – 10:00

VII. Building Block Three: Control of Your Time

35 Min

- A. Remember the Craftsman – reactive, not pro-active
- B. The enemies of control
- C. Basic principles of controlling your time
 - 1. Time blocking
 - 2. Develop a Lieutenant
 - 3. Control external interruptions
 - 4. Control internal interruptions

10:00 – 10:15

15 Min

VIII. Building Block Four: A VALUE Perspective

- A. First VALUE perspective: Creating PERCEIVED VALUE in the eyes of your client
 - 1. The craftsman is committed to the product. The Master is committed to the client.
 - 2. What does your client WANT?
- B. Second VALUE perspective: Value BILLING
 - 1. The Billable Hours fiasco

10:15 – 10:30 BREAK

10:30 – 11:00

30 Min

IX. Building Block Five: A SYSTEMS Approach

- A. Definition of CUSTOMS
- B. Definition of SYSTEMS
- C. CUSTOMS produce a craft, SYSTEMS produce a business.
- D. You cannot move successful from Craftsman to Master without SYSTEMS
- E. The fully systemized office

11:00 – 11:30

X. Building Block Six: Leverage

10 min

- A. Merriam-Webster Dictionary: POWER; EFFECTIVENESS
- B. Leverage: achieving a result using the time, efforts and expertise of others.
- C. WITHOUT LEVERAGE YOU HAVE NO BUSINESS. ONLY A JOB.
- D. Reciprocal Key Concepts
- E. Available leverage
- F. How well are you using your available leverage?
- G. Effective delegation

- H. Control of your files
 - 1. Most attorneys:
 - a. Monthly open file list
 - b. Stacks of files
 - c. Calendar with deadlines
 - 2. Case Manager
 - a. All files listed
 - b. Updated weekly, shared with all staff
 - c. Focus of staff meetings

11:30 – 11:45

XI. Building Block Seven: Client Education

15 min

- A. Take a pro-active approach to the client relationship
- B. Develop a client intake SYSTEM
 - 1. Prospective client screening
 - 2. Client education
 - a. Team introduction
 - b. How calls will be handled
 - c. Normal client meeting times
 - d. How the case/process will go
 - e. Financial specifics
 - 3. Client satisfaction monitoring
- C. Set standards for the client relationship
- D. Provide in writing, in a folder
- E. Diary clients for 30 and 90-day
 - 1. Evaluation
 - 2. Check-in

11:45 – 11:50

10 Min

XII. The Importance of Productivity and Client Development Skills to Client Care, Ethics and Risk Management

- A. Without productivity skills the Craftsman reigns. The result is:
 - 1. Overwork which produces
 - a. A poorer product
 - b. Poor client communication
 - c. Insufficient time to take adequate care of all clients
 - d. Temptations to cut corners
 - e. Avoidance
 - f. Poor client relations

2. Client dissatisfaction which produces
 - a. Bad debts
 - b. Bad word-of-mouth
 - c. Grievances
 - d. Malpractice suits
- B. Quality systems protect against
 1. Errors
 2. Missed deadlines
 3. Inadequate client communications
 4. Conflicts of interest
- C. Quality systems allow you to deliver
 1. The highest quality work product
 2. The best level of client care
 3. The most cost-efficient result
- D. Key systems for ethical client service and effective risk management
 1. Potential client screening
 2. Conflict check
 3. Dual calendaring
 - a. Second pair of eyes
 4. Written procedures, checklists and standard forms for all phases of your practice
 5. Workflow control and management systems
- E. Poor client development skills result in:
 1. "Door Law" which produces
 - a. Mostly C & D clients
 - b. Practicing out of specialty
 - c. High receivables
 - d. Low income
 2. Insufficient income, which produces
 - a. Inadequate staff support
 - b. Temptation to cut corners
 - c. Desperation
 - d. Frustration and burnout

11:50 – 12:00

10 Min

XIII. Review of Productivity Principles and Questions

12:00 – 1:30 LUNCH BREAK

1:30 – 4:30 Client Development

1:30 – 1:40

10 Min

I. Client Development Perspectives

- A. The Law School Myth: Just Be A Great Lawyer...
- B. What Marketing is NOT about:
 - 1. Sleazy ethics
 - 2. Poor legal skills
 - 3. Advertising
 - 4. Soliciting
 - 5. Sales
 - 6. Imposing on friends
 - 7. Begging
 - 8. “Hired guns”
- C. What Marketing IS about:
 - 1. Focusing on referral sources, not clients
 - 2. “Know, like & trust”
 - 3. Attracting Golden clients
 - 4. Saying NO to “E” and “F” clients
 - 5. Learning to speak powerfully
 - 6. Developing a PERSONALIZED and SYSTEMIZED marketing plan
 - 7. Staying in consistent action
- D. Translating The Primary Excuse For Not Marketing: “I’m Too Busy.”
 - 1. Uncertainty about what to do
 - 2. Discomfort with the process
 - 3. Inadequate conversational ability
 - 4. Ethical concerns about solicitation
 - 5. Feeling “phony” and insincere
 - 6. Concern about appearing desperate
 - 7. “If you’re any good you don’t have to solicit”
- E. Exercises and Discussion
 - 1. Identify:
 - a. What percentage of your business comes from referrals
 - b. The types of marketing activities you engage in
 - c. How many specific marketing activities you conduct each week
- F. The Marketing Rollercoaster
- G. Exercise: Identifying missing client development skills

1:40 – 1:45

5 Min

II. The Seven Building Blocks of A Golden Book:

1. Focus, Focus, Focus!
2. It's all about relationship
3. WHO you know beats WHAT you know every day
4. Words mean business
5. Keep the screen door closed
6. Marketing can be fun!
7. It's a marathon, not a sprint

1:45 – 2:00

15 Min

III. A Practical Look at Yellow Pages Advertising

A. Profile of the Golden Client

1. The Client
 - a. Reasonable expectations
 - b. Can pay your bill
 - c. Cooperative
 - d. Responsible
 - e. Understands the process
 - f. Possible referral source
 - g. Potential for additional business
2. The Matter
 - a. In your practice area
 - b. Enjoyable, interesting
 - c. Significant size
 - d. Ongoing – multiple – continuing
3. The Source?
 - a. Accountant
 - b. Attorney
 - c. Doctor
 - d. Other professionals
 - e. Someone they know and trust

B. Yellow Pages

1. Received by everyone
2. Average caller characteristics:
 - a. Shoppers
 - b. Free advice seekers
 - c. First-time users of the legal system
 - d. Those with small or dubious matters.
 - e. Those who have been turned down by other lawyers
 - f. Those who have fired other lawyers or been fired by them
3. These are the characteristics of what kind of client?

C. The Danger Of Yellow Pages Ads:

1. Scenario 1:
 - a. High cost
 - b. Hours lost talking to those who “just want to ask a question”
 - c. 75-90% of time spent screening prospective clients will be non-billable for
 - i. You
 - ii. Associate
 - iii. Paralegal
 - d. Significant added overhead for screening
2. Scenario Two:
 - a. Little or no screening
 - b. Practice fills with “E” clients
 - c. No time – no money – no practice
3. The Magic Combination:
Lawyers + Advertising = DISASTER !
4. Appropriate Roles For Advertising In A Law Firm:
 - a. Support for focused marketing
 - b. Contributions to organizations you or the firm support
 - c. “Community service”
 - d. “Awareness”

2:00 – 2:10

10 Min

IV. Building Block One: Focus, Focus, Focus!

- A. Difficulties of marketing a diverse practice
 1. Cultivating several different categories of referral sources
 2. Effective communication with diverse client and referral source groups
 3. Professional image
 4. Building a reputation

2:10 – 2:30

20 Min

V. Building Block Two: It’s All About The Relationship

- A. The source of most A – B clients is referrals
- B. The most profitable practices are built on long-term referral relationships.
- C. People refer business to those they:
 1. Know
 2. Like
 3. Trust
 4. Want to support
- D. What’s at stake with every referral

- E. Referrals are sent by people who
 - 1. KNOW
 - 2. LIKE
 - 3. TRUST YOU

2:30 – 2:45 BREAK

15 Min

2:45 – 3:10

25 Min

VI. Building Block Three: WHO You Know Beats WHAT You Know Every Day.

- A. Without clients to serve, your legal skills are IRRELEVANT.
- B. Client sources:
 - 1. What percent come from EXTERNAL referrals?
 - 2. What percent of your clients who come from INTERNAL referrals?
 - 3. Number of ACTIVE referral sources: _____(those who have sent you business in the last year)
- C. Exercises:
 - 1. Identify the categories of your referral sources
 - 2. Exercise: Identify Your CURRENT Referral Sources
 - 3. Exercise: Identify other POTENTIAL Referral Sources
- D. Managing internal referrals
- E. How to expand your referral list
- F. Exercise: Identify three colleagues or referral sources to take to lunch
- G. Team Exercise: identify other potential referral source categories

3:10 – 3:40

30 Min

VII. Building Block Four: Words Mean Business

- A. How you speak about yourself has a primary impact on:
 - 1. Other peoples' impressions of you
 - 2. How others speak about you
 - 3. The level and effectiveness of your professional and referral relationships
 - 4. Your business development.
- B. Traditional conversations often inhibit or discourage relationship development
- C. Most people you know (including other lawyers) do not fully understand what you do
- D. The Public's Perception of Lawyers
- E. How to create a positive distinction between you and "lawyer"
- F. How to train others to speak about you effectively to help you generate business:
 - 1. Exercise: how my spouse or friend would introduce me

- G. Value Statement Exercise
- H. Conversations for Client and Prospect Meetings
 - 1. Rules for Successful Client and Prospect Meetings
 - a. Create an environment that builds trust.
 - b. Listen fully.
 - c. Communicate fully.
 - d. End the meeting courteously
 - e. Follow up promptly with any information promised
 - f. Schedule additional time to make notes, dictate or take action
 - g. Never put anything in the file you wouldn't want the client, another attorney or opposing counsel to see
 - h. Bill promptly and with explanation
- I. Conversations to Expand Your Practice Through Clients Or Former Clients
 - 1. Asking for more business
 - 2. Asking for referrals
 - 3. Cross-selling
 - a. Key places for planned cross-selling conversations:
 - i Initial client interview
 - ii New client welcome letter
 - iii Mid-course client check-in calls
 - iv Closing client conference
 - v Matter closing letter
 - vi Periodic marketing communications
 - 4. Do's and Don'ts for Cross-Selling
- J. Conversations for Lawyer Meetings
 - 1. The fundamental considerations that underlie all referrals
 - 2. Your objectives
 - a. To build trust and relationship
 - b. To explain your practice and the kinds of people you best serve
 - c. To understand their practice and who to refer to them
 - d. To encourage them to refer business to you
 - 3. Key Referral Source "Integrity" Conversations
 - 4. Three important integrity conversations
- K. Referral Etiquette
 - 1. Thank the referrer promptly
 - 2. Send non-confidential "progress reports" periodically
 - 3. Send them a thank you when the matter closes.
 - 4. Ask the client to write a note thanking the referring attorney
 - 5. For multiple referrals, send a personal gift

L. Keys To Building & Maintaining Relationships

1. Know thy referrer!
 - a. Develop a database of your referral sources
 - b. Make notes of conversations, important information
 - c. Collect key information:
 - a. Review it before meeting with them
 - b. Send a personal note after each lunch
2. Build a “friend” relationship
3. Treat their staff kindly
4. Thank and acknowledge
5. Contact them regularly

3:40 – 3:45

5 Min

VIII. Building Block Five: Keep The Screen Door Closed

- A. Client selectivity is essential to building a successful practice.
- B. The cost of “F” clients
- C. How To Turn Down Referrals
- D. How will you use the time saved from C-D clients?
- E. How and why to build a new client screening system

3:45 – 4:05

20 Min

IX. Building Block Five: Marketing Can Be Fun

- A. The danger of marketing as “work”
- B. Exercise: types of marketing activities you engage in
- C. Marketing activities should be compatible with your personal interests, hobbies and personality type.
- D. Marketing Activities Exercises:
 1. Part 1: What hobbies, interests or activities do you personally enjoy?
 2. Part 2: What special types of activities or purposes are you committed to?
 3. Part 3: What types of activities you would be willing to do for marketing?
 4. Part 4: Team exercise: develop a broader list of activities for marketing

4:05 – 4:10

X. Building Block Six: It’s A Marathon, Not A Sprint

- A. Typical marketing pattern
 1. Results
- B. Effective marketing pattern
 1. Results
 2. The fundamental element of effective referral marketing
 3. Minimum number of marketing activities needed to maintain your practice
 4. Minimum number of marketing activities needed to grow your practice
- C. APPLICATION, not INFORMATION, is king.

D. Keys to effective action

1. Notice when the Craftsman is calling you away
2. Discomfort will diminish as you have pleasant and successful experiences
3. New actions will feel strange and uncomfortable
4. New actions create new habits
5. Consistent action over time will begin producing consistent results
6. Consistent action creates cumulative results

4:10 – 4:15

5 Min

XI. Review of Client Development Principles

4:15 – 4:25

5 Min

XII. Support available from Attorneys Master Class

4:25 – 4:30

5 Min

XIII. Questions & Discussion

4:30 Close