

Running A Virtual Law Firm

Critical Strategies to Stay Focused at a Crazy Time

Atticus Helping You Survive to Thrive

April 21, 2020

Attorney & Practice Advisor

STEVE RILEY

www.atticusadvantage.com

- Steve helps attorneys grow their practices. He has a way of helping attorneys who might be “stuck” and guide them through a process of self-discovery and major breakthroughs.
- Steve is a shareholder in Atticus, the largest practice management company working with solo and small law firm owners. He created the Practice Growth Program™, the Dominate Your Market™ program, and the Double Your Revenue™ workshop. Prior to joining Atticus, Steve built and sold his own law practice.
- He has written seven books, won a national award for practice innovation, and written a national column on practice management.



ABOUT ATTICUS

- **Atticus™ was founded in 1989** to provide in-depth, ongoing support and accountability programs for lawyers and law firms that will effectively:
 - increase gross revenues and personal incomes,
 - reduce stress and the number of hours in the office,
 - develop greater career satisfaction,
 - and allow more time for family and personal interests.



ATTICUS®
Guiding Your Practice SM

WHAT WE DO

Our Programs, Workshops, and Webinars are designed to streamline the management of your practice, increase revenue, reduce stress, and balance your professional and personal life.



ATTICUS®
Guiding Your Practice SM

What kinds of
attorneys and
groups does
Atticus work
with and how?



SOLO AND SMALL FIRM
ATTORNEYS



MANAGING PARTNERS
AND LEADERS



LEGAL ASSOCIATIONS



FROM START TO EXIT

Atticus Coaching Services & Products



Monthly Webinars

- Atticus Advantage Series (Free)
- Practice Growth Series™
- Rainmaker Roundtable



1-Day Workshops and 1/2-Day Workshops

- Double Your Revenue™
- How to Build Your Law Firm for Sale™
- Solo & Small Firm Foundations™
- How to Build a Profitable Team™



Quarterly In-Person Group Programs

- Practice Growth Program™
- Dominate Your Market™



1-on-1 Coaching

Tailored to your specific needs and
goals for your practice and your life



Books

- How Good Attorneys Become Great Rainmakers
- Time Management for Attorneys
- Hire Slow, Fire Fast



THE SOLO & SMALL FIRM **FOUNDATIONS FOR GROWTH™**

Revenue, Income, Control, Freedom and Impact



**Time
Management**



**Client
Development
& Marketing**



**Building a
Great Team**



**Cash Flow &
Profitability**

Legal Skills

Challenges

**Helping you and your firm survive
and then thrive out of this crisis.**

3 Major Challenges

- Staying focused and productive-
staying on your plan and doing the
highest and best use of your time
- Keeping your team focused and
productive
- New Clients and Cash Flow



Helping You Stay Focused!

Your Brain
During a
Crisis!

Pre-Frontal Cortex

Vs.

Amygdala







Strategy 1



Help your Brain



Plan Your Day

The Atticus Daily Focuser™

- Build Daily Habits
- Big Rocks First-top 3
- Daily Accountability
- Use it Daily; start and finish



THE ATTICUS DAILY FOCUSER™

Name: Date:

- ☐ Exercise
- ☐ Spend 15 minutes completing Atticus Daily Focuser™
- ☐ Review Calendar, Cash Flow Focuser™ (2 Weeks Ahead)
- ☐ Meet with Key Assistant — Top 3 Delegations:

☐ 1 ☐ 2 ☐ 3

Today's Top 3 Objectives:

- ☐
- ☐
- ☐

If Completed, What 3 Are Next?

- ☐
- ☐
- ☐

- ☐ Change Voicemail Announcement, Check Messages
- ☐ Check Email (Delete, Delegate, Delay, Do)
- ☐ Return Phone Calls; When
- ☐ Meet with Production Staff
- ☐ Check To-Do Lists
- ☐ Marketing Contact for the Day (Did I Ask for a Referral?)
- ☐ Check Billing
- ☐ Clean Desk at Day's End; Print Tomorrow's Focuser; Make Note of Key Follow-ups

Strategy 2

Design Your Week



What does an “ideal week” look like to you



Structure it, design it, then share it



Think through exercise, meetings, clients, marketing, and anything else you think is important.



Then use your calendar to structure it.

Use a time template and schedule blocks for client appointments

TIME TEMPLATE WORKSHEET

	Monday	Tuesday	Wednesday	Thursday	Friday
7	Exercise	Exercise	Exercise	Exercise	Exercise
7:30					
8	Cashflow	TEAM HUDDLE	TEAM HUDDLE	TEAM HUDDLE	TEAM HUDDLE
8:30	Focus Mtg.	KEY ASSISTANT	KEY ASSISTANT	KEY ASSISTANT	KEY ASSISTANT
9	Calls/Emails	Calls/Emails	Calls/Emails	Calls/Emails	Calls/Emails
9:30					My 90-Day Focus
10	Strategic Growth Projects	Client Meetings	Casework or Hearings	Client Meetings	Strategic Growth Projects
10:30					
11					
11:30					
12	Lunch w Top 10 Referral Source	Lunch w a NEW Referral Source	Lunch w Top 10 Referral Source	Take Atty _____ to Coffee/Lunch	Lunch w Top 10 Referral Source
12:30					
1					Calls/Emails
1:30	Casework or Hearings	Client Meetings	Casework or Hearings	Client Meetings	Possible Free Time
2					
2:30					
3					
3:30		Marketing		Marketing	
4					
4:30	Calls/Emails	Calls/Emails	Calls/Emails	Calls/Emails	
5					
5:30					
6		Lead Generation Workshop			
6:30					
7					
7:30					
8					
8:30					
9					

What do you need to schedule time for?	Direct Income	Indirect Income	What do you need to schedule time for?
Production			Morning Only
Return Phone Calls			All Morning & All Afternoon
Marketing			Some Mornings & Some Afternoons
Case Status Review			Afternoons Only
Client Meetings			After PM
Working on Biz			On Some Saturdays
When are you at your best to do technical work?			Morning
			Afternoon

Note: This should be the normal schedule you keep. If you are involved in litigation, you will lose the ability to dictate your schedule for periods of time — but default back to this schedule at the earliest opportunity.

Time Template Suggestions

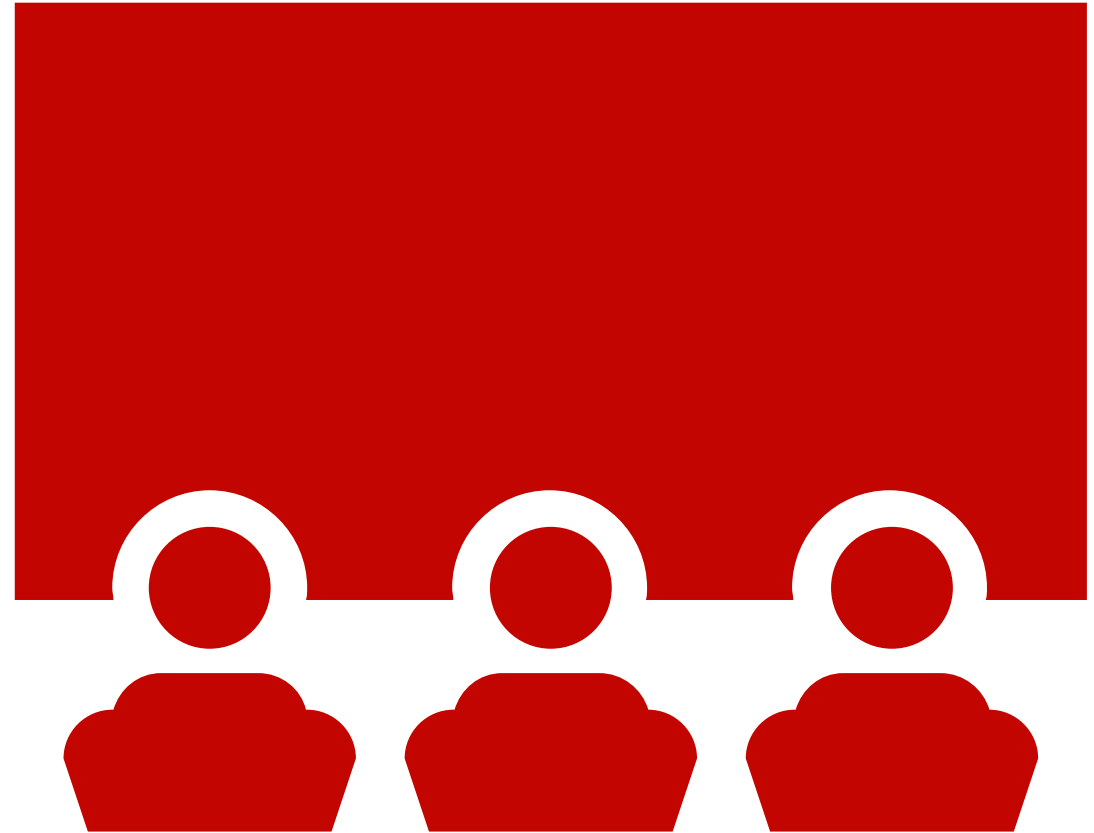
Think of your “ideal week”

- Exercise
- Assistant call-shared agenda (OneNote)
- Team call - create when and how
- Be prepared to teach your team how to create one for themselves
- Team huddles to reduce email tsunami (more on this in a minute)

TIME TEMPLATE WORKSHEET

	Monday	Tuesday	Wednesday	Thursday	Friday
7					
7:30					
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Managing and Focusing Your Team



The Success Trap™ x Virtual World



More clients



More Staff



More referral sources



Equal.....



As your firm grows, your management needs to adjust and change.



Virtual adds a whole level of complexity



Focuser for Team

- They are Scattered
- Priorities Aligned?
- Prep and review-15 minutes
- Check in at 1:30
- Completion at 4:30



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☐ Meet with Key Assistant — Top 3 Delegations:

☐ 1 _____ ☐ 2 _____ ☐ 3 _____

Today's Top 3 Objectives:

If Completed, What 3 Are Next?

<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____

☐ Change Voicemail Announcement, Check Messages

☐ Check Email (Delete, Delegate, Delay, Do)

☐ Return Phone Calls; When _____

☐ Meet with Production Staff

☐ Check To-Do Lists

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☐ Check Billing

☐ Clean Desk at Day's End; Print Tomorrow's Focuser; Make Note of Key Follow-ups

Team Time Template

- You are their **Big Rock**, and so they must pivot around your time template.
- Atticus Daily Focuser™
 - First thing in the am
- Daily Huddles
 - 3x a day
- Team Meeting 1x a week?
- Production
- Customer service

	Monday	Tuesday	Wednesday	Thursday	Friday
7					
7:30					
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8:30					
9					

Question Batching Form

- Must DO Virtually!
- Your team can't "lurk and blurt"
- So, they will resort to email and bury you!
- Teach them to use it
- Helps clarify thinking
- Propose solutions
- During the 15-minute huddles
- Go from 150 emails before lunch down to 10

For: _____	Question Batching Form	Date: _____
Case: _____		
Question:	_____	

Notes:	_____	

Tasks:	_____	

Case: _____		
Question:	_____	

Notes:	_____	

Tasks:	_____	

Case: _____		
Question:	_____	

Notes:	_____	

Tasks:	_____	

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Types of Team Meetings

- Pre-Set Agendas
- Management
- Case Management
- Project Management
- Training
- Huddles-15 minutes



Set a new agenda for weekly team meetings



WINS



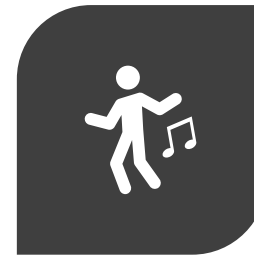
CASH FLOW AND
PROSPECTS IN
PIPELINE



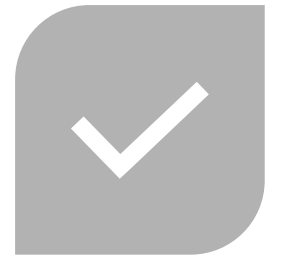
CALENDAR REVIEW-
30 TO 90 DAYS OUT



TOP 10 CASES



SOMETHING YOU ARE
LOOKING FORWARD
TO THIS WEEK



TAKE AWAY OR
SCORE 1 TO 10

Managing and Focusing on Your Family

#GrowWithAtticus



AtticusAdvantage.com

On everyone's
time template

Positive focus
and wins

Family goals-
projects

Look at week
ahead - any
conflicts, school
issues,

Any house/chore issues

- Running weekly chore list (give kids daily, depending on their schedule)
- Do 15-minute room clean sprints

Select follow-up
items to do 10-
minute attack,
then re-meet

Take away



3 Steps to Killing the Golden Goose

Allowing the crisis to consume you. No time off, exercise and boundaries.

You highly stressed. Your brain responds as if you are under attack.

Neglecting health and critical relationships starts to become "normal."



Time Off!



Time template



Best and worst days at home



Gold, silver, and bronze

Design Your Time Off



Gold-exercise, coffee with my wife and dogs, Xbox with kids, dinner with the family,



Silver-exercise with my wife, reading a novel, cooking as a family, and family movie



Bronze-exercising as a family (hysterical).
Watching family movies all day.
My wife's favorite, my least.



Not free time-errands, work around the house, chores-those are workdays. I will have designed home project days. I have a domestic assistant and handyman, where and when I can.

Design Your Time Off



No Email



No phone call



No work



No exceptions



Reading a law book, business book, podcast, list serve, drafting, blogs, briefs, brochures, teaching, any thing related to work, is work!

Coronavirus Preparedness Hotline – Daily

- 9-10 am EST*
- Dial-In: 813.769.0500
- Access Code: 482-879-295#
- If you can't make the call, or the time slot doesn't work:
email grow@atticusadvantage.com and a practice advisor will contact you ASAP.



Stay Informed:

- **Specific Response Plans:**
 - Preparing Your Firm Should the Coronavirus Impact Your Community
 - Protecting Your Family Law Firm During the Coronavirus Pandemic
 - Technology and Tips to Run a Secure Practice Remotely
 - Protecting Your Marketing Pipeline& Preparing for the Deferred Demand
 - Protecting Your Personal Injury or Litigation Law Firm During the Coronavirus Epidemic
 - Preserving Cash Flow in an Economic Slowdown
 - Protecting Your Estate Planning Law Firm During the Coronavirus Pandemic
- **atticusadvantage.com/what-we-do/webinars**



Stay Informed:

- **April 21, 12 pm EDT**

Running a Virtual Law Firm: Strategies to stay focused at a crazy time



Stay Connected:

- **Atticus Social Media:**
- **Facebook**
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- **LinkedIn**
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- **Twitter**
[@atticusattorney](https://twitter.com/atticusattorney)
- **YouTube**
youtube.com/user/AtticusCoach



Final Thoughts and Questions

QUESTIONS



To ask a question, there are two methods:

1. Use the chat function on your GoToWebinar dashboard to send a message to the event organizer. If you would like your question to remain anonymous, indicate so in your message.
2. Click the hand icon to indicate you have a question or comment, and we'll call on you. When we do, we will "unmute" you so that you can be heard.



Thank You!

grow@atticusadvantage.com
