

REVERSIBLE ERRORS

How To Improve Your Practice and Your Life

PRESENTED BY

Denise Gamez
Glenn Gutek



July 25, 2022



ATTICUS™
Great Practice. Great Life.

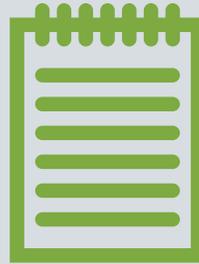
ABOUT US

We help lawyers grow great practices and cultivate great lives

PARTICIPATE



Pencil & paper
ready



Take notes



This session is interactive,
be prepared to join the
conversation

DENISE GAMEZ

DIRECTOR OF MEMBER SERVICES

- Denise is a well-respected practice growth advisor, speaker, and blog writer. She has committed over ten years to helping attorneys grow their practices in a sustainable and intentional way using Atticus coaching processes. She has worked with hundreds of solo and small firm attorneys, across the United States and Canada, to diagnose issues in their practice holding them back from growth and satisfaction.
- Before her work in attorney practice management, Denise was a sports anchor and television personality. She is married to PGA tour player and professional golfer Robert Gamez and is the President of Team Gamez Foundation. Her experience, wit, and front stage personality engages with audiences. She is never a dry speaker.



GLENN GUTEK

PRACTICE ADVISOR

- Prior to joining Atticus, Glenn served as principal consultant and coach for a company that facilitated the development of executives, managers, and leaders of large corporations as well as nonprofit organizations. His skills in leadership, speaking, and training prompted him to work with a wide array of leaders and entrepreneurs across the country
- Glenn's knowledge of and passion for creating healthy corporate cultures has given him the opportunity to work with some of the brightest and best leaders around the country. Furthermore, Glenn has been a featured speaker at national events on the topic of leadership and personal growth
- Glenn graduated with honors from Flagler College in St. Augustine, Florida, with a degree in psychology and philosophy. Following his undergraduate work, Glenn received his Masters of Divinity from Asbury Theological Seminary and an MA in Organizational Psychology from the University of Kentucky.



TERRI HAYS

DIRECTOR OF MEMBER SERVICES

- Terri joined Atticus team in 2020, bringing more than a decade of business growth experience
- She has extensive background in acquiring, nurturing, and managing. Long-term client relationships makes her uniquely qualified to help you grow your practice
- She grew up in Florida and married her high school sweetheart. Together, they have five children and three grandchildren



INTENTION

We have two goals:

1. To help you create a framework and mindset around the future of your practice.
2. To introduce the **Solo Practice Profit Scorecard™** to compare your current performance against Atticus' suggested best practices.

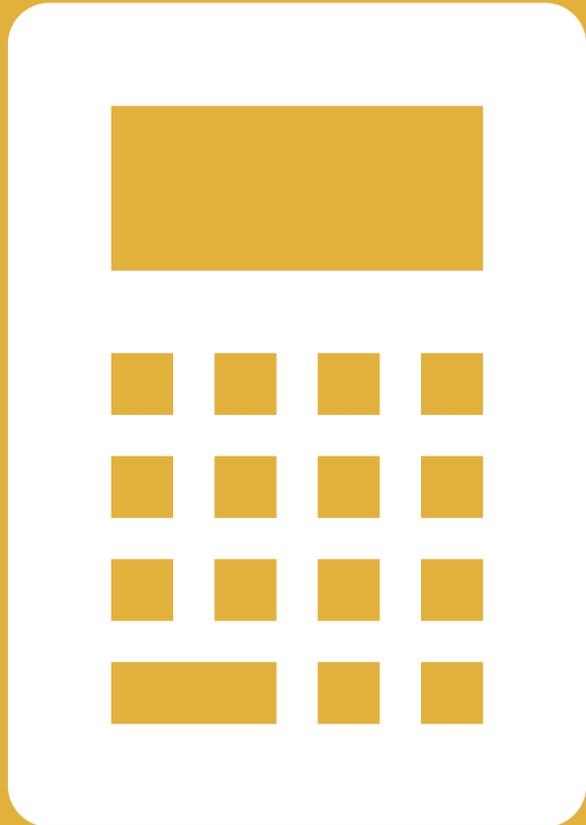
WHY DO WE ASSESS THESE ELEMENTS?



“If you can't measure it, you can't improve it.” – Peter Drucker



You can't truly know whether you are running a successful practice until you've defined what success looks like to you and tracked your efforts and results. You must measure progress and adjust your processes if you hope to produce a desired outcome. Without clear objectives, you're doomed to live in a constant state of guessing



LET'S DO SOME THINKING (AND MATH)

It's time to look at your practice and its current state.

The Solo Practice Profit Scorecard™

Name: _____ Date: _____

| CRITERIA | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | Current | Prior | Change |
|--|---|---|---|---|---|---|--|---|---|--|----|----|---------|-------|--------|
| Profitability & Cash Flow | I constantly feel stressed about cash flow and don't think I'm paid enough for the work I do. | | | I make a good living and am not stressed out about cash flow. | | | I pay myself a great base compensation. Additionally, I make a 35% profit margin as a shareholder. | | | More than 50% of my income is derived from profit centers (other people) in my firm and not from my personal production. | | | | | |
| Time Management | I get in early, stay late. I work most weekends, and if I am not in the office working, I am on my phone or checking my email while out of the office. | | | I work a lot, but I take at least one two-week vacation annually. When I am off, I seldom check email or phone messages and only deal with emergency issues. | | | I don't work weekends, I have a four-day work week, and I average four weeks a year off. While I am off, I do not check email or phone messages. | | | I can take 175 days off and the firm works just fine, if not better, as opposed to when I am there. When I am off, I don't check email, do client work, or take phone calls. | | | | | |
| Great Team | I avoid hiring, training and managing people because nobody can be trusted to do the work and handle the firm's clients as well as me. I can't find anyone good to hire. | | | I am constantly frustrated. I think I may have "adopted" my team. I feel like I am often cleaning up their messes and am frustrated by their constant interruptions. | | | My team understands where we are going. We have weekly team meetings. My team takes delegation well and handles basic customer service issues. They understand our workflows. | | | My team is self-managing. They are clear on their revenue targets and understand what is crucial to their performance. I constantly receive compliments from others about them. | | | | | |
| Process & Workflows | I don't have any systems or checklists or processes to handle workflow and customer service. We either don't have or use an office procedure manual. | | | We have some documented checklists and workflows, which are kept in a central location. Occasionally, I must remind my team where they are and when to use them. | | | Our workflows and systems are great. My team uses them and looks for ways to improve them. If they've got a question, instead of interrupting me, they always go there first. | | | We have a visual workflow process. When a new hire joins the firm, we begin their training there. If there is a system or process breakdown, it is brought up immediately and the team works to improve the process. | | | | | |
| Marketing to new Prospects | I have no time to market. If I did, I wouldn't do it anyway. I would rather just practice law. | | | I have marketing opportunities that come to me. I am happy to reactively take on marketing opportunities, but I am not proactively seeking or growing my marketing opportunities. | | | I know what to say, when to say it, and how to say it. However, I know there are some areas in my marketing where I could use improvement. | | | I have a strategic approach to marketing. I receive a consistent amount of high caliber new business. My competitors are jealous and annoyed with my marketing success and dominance. | | | | | |
| Marketing & Prospect Conversion Process | I do all marketing meetings, initial meetings and manage all marketing projects. All marketing depends on me. My marketing depends on cash flow. When I don't have any, I market! | | | My marketing efforts, including my website, don't bring me the right kind or enough clients. I know what to do but I am either failing to do it or "too busy" to do it. Overall, I'm am not getting a good ROI on my marketing efforts. | | | We have a marketing and prospect-to-client conversion process. We know our ideal client, ideal referral source, and our pricing is excellent. We have three marketing contacts per week, and we have an annual marketing calendar. | | | We are a marketing and conversion machine. We can influence an uptick in new business whenever we want. Our conversion process is amazing, and at least 80% of our initials are done by non-lawyers. | | | | | |
| My Mindset | I am a great lawyer. I only want to be a great lawyer; I don't have a mind for business. I believe the better legal technician you are the more money you make! | | | I know it's a business, but I don't know how to grow the business. I like being the "hero" of my story, but I don't know how to get out of that trap. | | | I focus daily on marketing, time management, profitability & staffing skills. I'm successful by anyone's standards, but the firm is still dependent on me. | | | I focus every day on building a market-dominant firm that does not depend on me. I am focused on building a great team, a marketing machine, and strong profits without me. | | | | | |
| Total | | | | | | | | | | | | | | | |

WHAT DO THESE RANKINGS MEAN?

- **1 to 3** – You acknowledge there's evidence that you're struggling with this issue and having poor results. You've got no plan to improve
- **4 to 6** – You're not failing, per se, but you're certainly frustrated with your firm's performance in this issue. You need help implementing foundational growth elements in the business
- **7 to 9** – You're doing well overall in managing this issue. However, you know there's still room for improvement and you are committed to getting better. You're ready to launch an improvement plan
- **10 to 12** – You're pretty much mastering this issue, but now you're ready for a much bigger game. Your confidence is high because of past results. You are in the realm of "best practices"



WHAT DOES MY TOTAL MEAN?

I've done the math. I see where I need improvement, but ...

1ST EXERCISE



Determine what score was your lowest



Why



If you take action to improve it over the next 90 days, what would you do?

2ND EXERCISE



Which score was your highest?



Why?



What are the top 2 strategies behind that high score?

Biggest Takeaway



WHAT SHOULD I DO NEXT?

I'm ready to get to work on improving my score.

PRACTICE GROWTH DIAGNOSTIC



- The Focused DISC Advantage™
- The Practice Assessment
 - The 4 Foundations of Practice Growth™
- The Advisor Growth Analysis
- The 3 Most Impactful Actions

PRACTICE GROWTH DIAGNOSTIC



What is my investment?

- \$295 – This includes the practice survey, a DISC assessment and report (\$125 value), and a 1-hour teleconference with a Practice Growth Diagnostic Advisor to discuss your results and offer key suggestions and you will leave with 3 Impactful Actions you can work on right away.

Email me: deniseg@atticusadvantage.com

UPCOMING WORKSHOPS AND PROGRAMS



THE PRACTICE GROWTH PROGRAM™

August 25th, Orlando



DOUBLE YOUR REVENUE WORKSHOP™

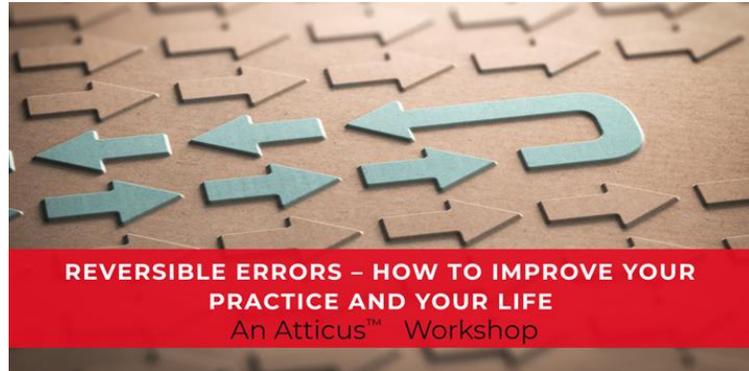
September 9th, Orlando
September 30th, San Francisco



REVERSIBLE ERRORS – HOW TO IMPROVE YOUR PRACTICE AND YOUR LIFE

September 23rd, Orlando

SPECIAL OFFER FOR YOU TODAY!



REVERSIBLE ERRORS – HOW TO IMPROVE YOUR PRACTICE AND YOUR LIFE

September 23rd, Orlando

As a thank you for joining us today, we're offering this \$1,295 workshop for \$995

Final Thoughts and Questions

Thank you!



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