

BUILDING A STRONG LAW FIRM CULTURE PART 1: CORRECTING TIME MANAGEMENT AND MARKETING MISTAKES

Presented By
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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 the President of Team Gamez Foundation. Her experience, wit, and front stage personality engages with audiences. She is never a dry speaker.



AARON ROTHERT

ATTORNEY & PRACTICE ADVISOR

- Attorney, a former instructor for the Internal Revenue Service, and has worked with the State Attorney's Office in Florida
- Works with law firm owners and associates to achieve their goals in the areas of time management, client development, staffing, cash flow and profitability
- Conducts DISC Behavioral Profile discussions with attorneys and team members
- Published in the *Family Law Journal* and writes regularly on time management and marketing for attorneys





ATTICUS™
Great Practice. Great Life.

ABOUT US

We help lawyers grow great
practices and cultivate great lives



ATTICUS™
Great Practice. Great Life.

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.

THREE REASONS ATTORNEYS START THEIR OWN LAW FIRM

1

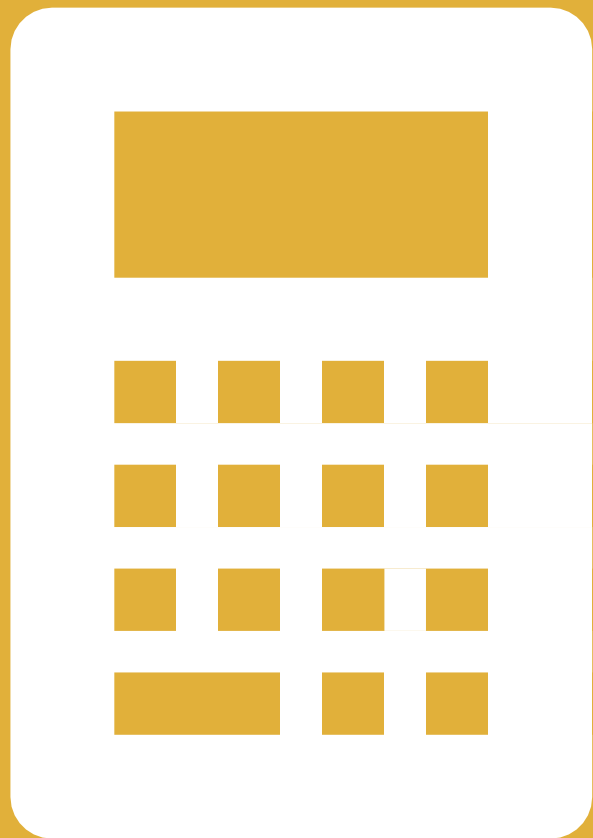
To help people

2

To make a
good living for
themselves
and their
family

3

To create
autonomy and
freedom by
having their
own business



LET'S DO SOME THINKING (AND MATH)

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

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

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 YOU CAN LEARN FROM THE SCORECARD



- How to position yourself and your firm through branding
- How to target new referral sources
- Work/Life balance
- How to delegate and trust team members

1ST EXERCISE



Determine which score is your lowest



Why



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

Biggest Takeaway



WHAT SHOULD I DO NEXT?

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

UPCOMING WORKSHOPS AND PROGRAMS



THE PRACTICE GROWTH PROGRAM™

San Francisco

Orlando



DOUBLE YOUR REVENUE WORKSHOP™

June 23, Orlando

September 8, San Francisco



STRATEGIC REFERRALS—MARKETING FOR LAWYERS

June 20th, 2-3:30 pm ET

SPECIAL OFFER FOR YOU TODAY!



BUILDING A STRONG LAW FIRM CULTURE – PART 2: CORRECTING TIME MANAGEMENT AND MARKETING MISTAKES

July 19, 2023

As a thank you for joining us today, we're offering **Part 2** of this **4 Part Series** for half off!

\$99 Workshop for \$49.50

Use code **REVERSE50** at checkout

Final Thoughts And Questions

Thank You!



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