

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

Presented By
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Aaron Rothert

DENISE CULLEN

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





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Great Practice. Great Life.

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We help lawyers grow great
practices and cultivate great lives



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UPCOMING WORKSHOPS AND PROGRAMS



THE PRACTICE GROWTH PROGRAM™

San Francisco
Orlando



DOUBLE YOUR REVENUE WORKSHOP™

September 8th, San Francisco
November 3rd, Orlando



LAW FIRM GOALS – IMPROVE YOUR GROWTH PLAN AND FINISH THE YEAR STRONG

July 25th, 2-3:30 pm ET

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

MORE THAN JUST BEING GREAT AT THE LAW



THE GROWTH CORNERSTONES™

REVENUE, INCOME, CONTROL, FREEDOM AND IMPACT



Sharpen Focus and
Prioritize



Attract High Value
Clients



Build a Great
Team



Cash Flow
and Profitability

LEGAL SKILLS

These are learnable business skills!

AGENDA



When and how to say “no”



The type of client you want to allow (upgrade or migrate your clients)



How to develop a personalized and systematic marketing action plan



Crucial questions to grow your referrals



How to block out uninterrupted time and work towards a vision

When and How to Say “No”

A small investment in planning your day can pay big dividends for you and your law firm.



TIME MANAGEMENT

PLAN YOUR DAY

Beware of being trapped by your calendar

- Big difference between being focused driven and calendar driven



Top 3

15 to 30 minutes

Paper organizer,
post it note, napkin



**DAYS PACKED LIKE
THIS, GIVE YOU
NO ROOM TO WORK
ON GROWING THE
PRACTICE.**



To grow a practice,
you must adopt strategies
that create room in a day,
protected time, for growth
projects that will generate
revenue.

The type of client you want to allow
(upgrade or migrate your clients)

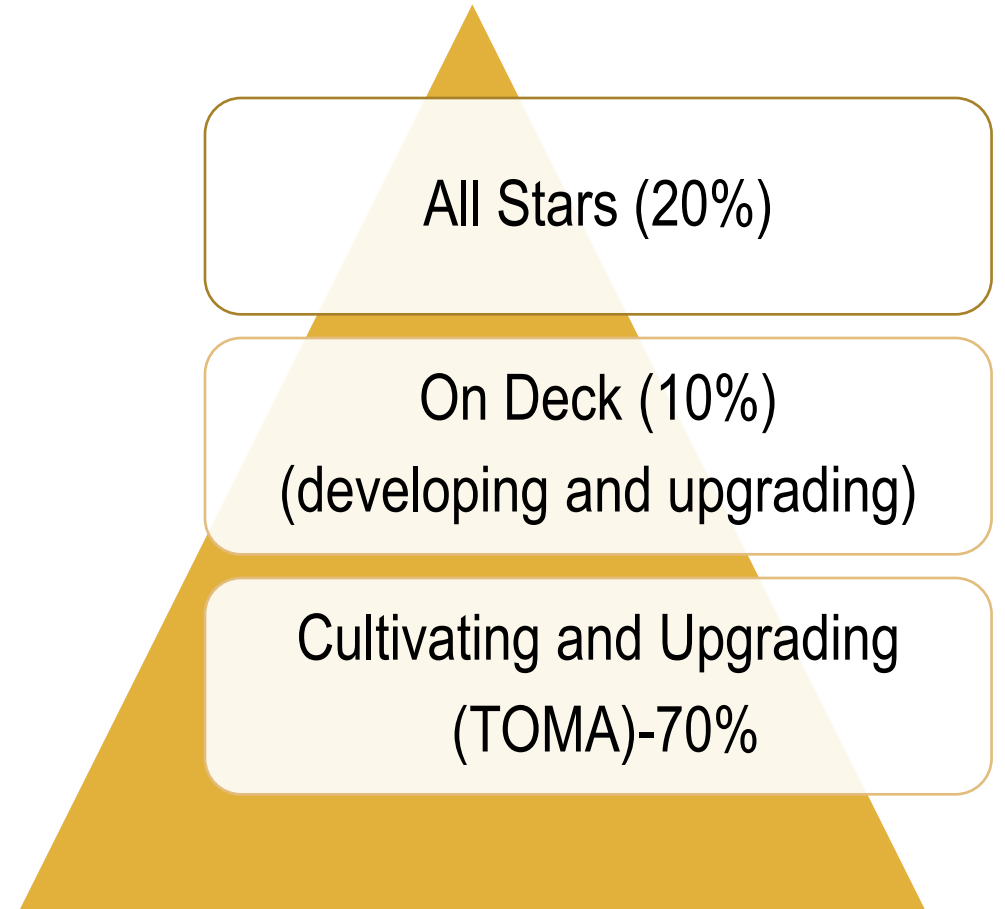
KNOW YOUR IDEAL CLIENT PROFILE

- Who do you want to work with?
- Who is your ideal client/your “A Client?”
- Who do you best serve?
- What are they currently doing?
- What are their pain indicators?
- What are their trigger events?



TOP OF MIND AWARENESS WITH CLIENTS

- The All Stars (20%) and On Deck (10%)
 - Call them, one on one time
 - Send them a unique article
 - Help them-intros, support, books, etc.
- 70%
 - Marketing assistant or relationship manager
 - Social media
 - Email “alerts, wins, trends”
 - Invite to events-depending on practice



THE ELEMENTS OF A PORTFOLIO-SIZE AND DEPTH

- Clients
 - A
 - B
 - C
- Attorneys (subspecialties)
- CPAs
- Financial professionals
- Social/Medical
- Prospects-never have done business but know who you are and how you help

How to develop a personalized and systematic marketing action plan



PLAN OUT YOUR MARKETING CALENDAR FOR THE YEAR

THINK THROUGH YOUR MARKETING ACTIVITIES



Do you have a season to your practice?

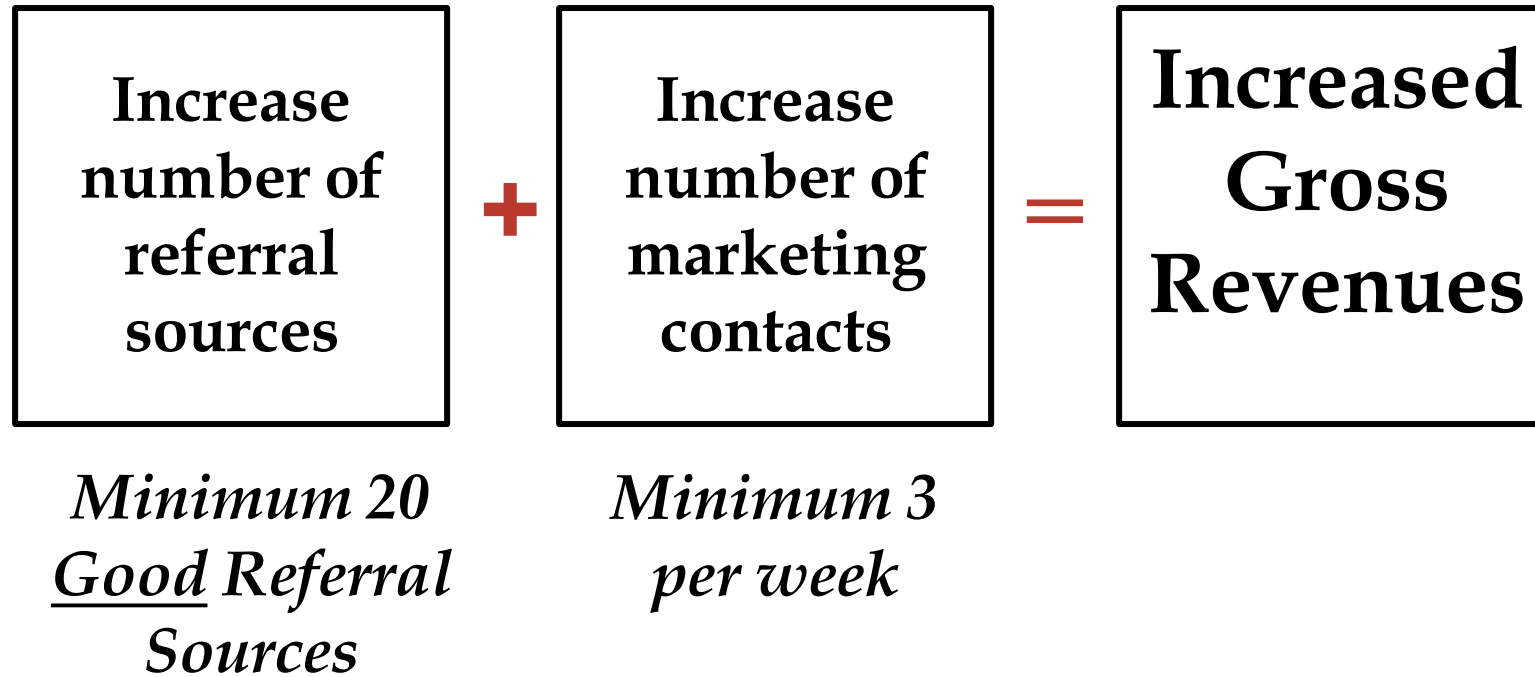


Do you have a workshop schedule?



Referral Development- 3 marketing contacts per week-is it possible for you?

Important Marketing Numbers



(Do nothing and get the same results you have now!)

WHERE TO START?

- List out 10 people in your referral community
- Interview 1 referral source per week over the next 4 weeks
- Complete a Practice Growth Diagnostic

Crucial questions to grow your referrals

THE KEYS TO BUILDING CREDIBILITY AND AUTHORITY

- Be useful
- Be humble
- Manners
 - Please, thank you, show up on time, and do what you say you're going to do
- Website matches what you say
- Look the part-dress professionally
- Customer service is key
- Never, ever complain
- Avoid gossip, politics
- Follow up on your promise

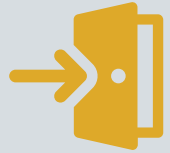
THE CRUCIAL QUESTIONS

1. What are your biggest frustrations in (i.e., dealing with your practice area) lawyers?
2. What problems have you had in the past that keeps you from using or referring a lawyer?
3. What would outstanding service from a lawyer look like to you?

How to block out uninterrupted time and work towards a vision

TIME MANAGEMENT

DAILY FOCUS SPRINTS



Close
Your Door



Close
Your Email



Turn Off
Your Phone

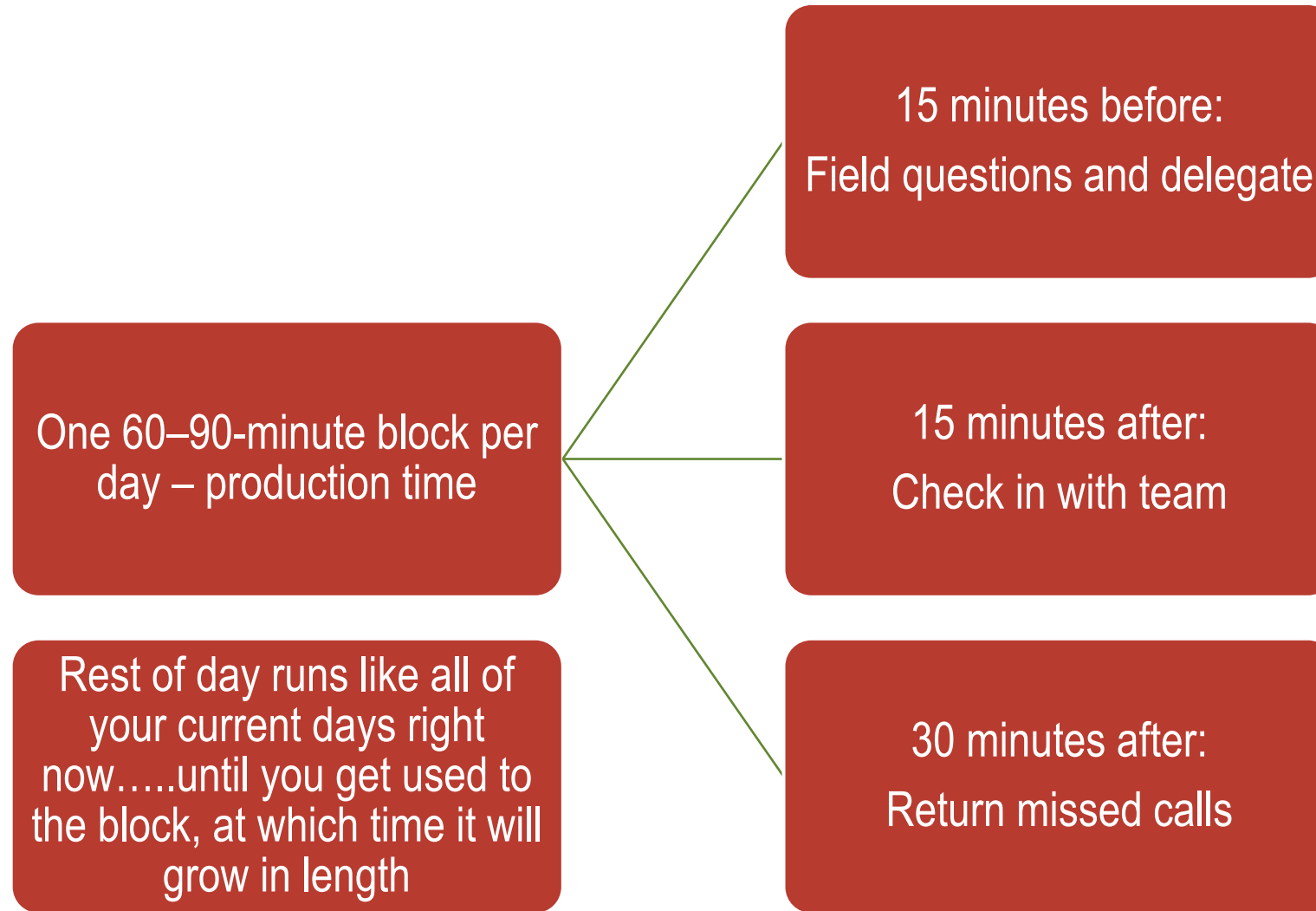


Focus for 25 Minutes –
set a timer



It will be okay. Facebook,
the listservs, your clients,
your world will still be there

POWER HOUR



PROTECT YOUR TIME OFF

RE CHARGE AND RECOVER



Kids school
calendar



Your key
vacations



Significant family
events



Health and
wellness

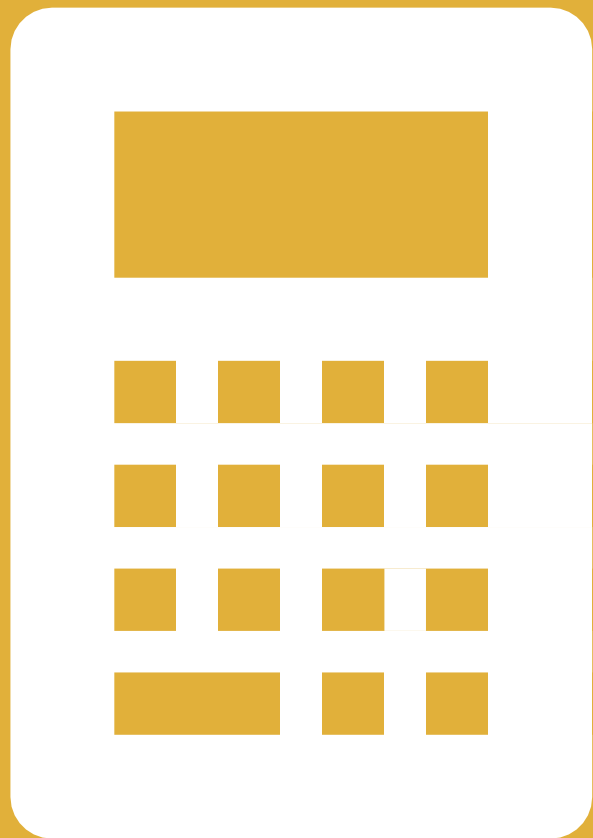
USE THE ATTICUS DAILY FOCUSER™ TO BUILD NEW DAILY HABITS AND CREATE ACCOUNTABILITY FOR BOTH YOU AND YOUR STAFF

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? |
|---|---|
| <input type="checkbox"/> <input type="text"/> | <input type="checkbox"/> <input type="text"/> |
| <input type="checkbox"/> <input type="text"/> | <input type="checkbox"/> <input type="text"/> |
| <input type="checkbox"/> <input type="text"/> | <input type="checkbox"/> <input type="text"/> |
- 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



LET'S DO SOME THINKING (AND MATH)

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

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

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"

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?

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.

UPCOMING WORKSHOPS AND PROGRAMS



THE PRACTICE GROWTH PROGRAM™

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Orlando



DOUBLE YOUR REVENUE WORKSHOP™

September 8th, San Francisco
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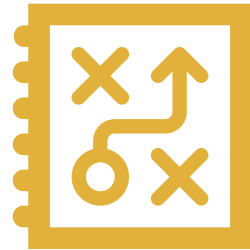
July 25th, 2-3:30 pm ET

Final Thoughts And Questions

DOING GREAT LEGAL WORK, BUT NO NEW CLIENTS?



- Marketing is an essential activity for every business
- Without new clients, a law firm won't survive



- Learn strategies to generate consistent, quality referrals and new clients
- Implement tactics to dedicate focus and resources to marketing



- Develop marketing action plans
- Measure your results with the system this program teaches



- Led by a dedicated facilitator
- Virtual group setting
- Learn best practices
- Hear from your peers

Atticus Rainmakers

Obtain more leads and referrals, while increasing your attention on essential marketing activities.

You'll also gain an accountability partner and support system!

SPECIAL OFFER FOR YOU TODAY!



BUILDING A STRONG LAW FIRM CULTURE – PART 4: PROFITABLE HIRING STRATEGIES

August 15, 2023

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Thank You!



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