

THE PATH TO A GREAT PRACTICE AND GREAT LIFE



VALERIE PETERSON

CHIEF EXECUTIVE OFFICER

- In 2023, Valerie joined Atticus, Inc., in the role of Chief Executive Officer. She comes to Atticus after serving ElderCounsel as their Chief Executive Officer
- Valerie practiced law in Manhattan, KS, and later Miami and Ft. Lauderdale where she was the owner of Peterson Law Office, P.A., and later Fisher & Peterson, P.C., a firm specializing in the areas of elder law and estate planning
- Valerie sold her practice to join ElderCounsel in 2008
- Valerie previously served as an adjunct professor for Stetson Law School where she taught the Veteran's Benefits Course to Elder Law LL.M. students



CHRISTINA INMON

STRATEGIC PROGRAM DEVELOPER

- Christina Inmon officially joined the Atticus team in October 2015. She was the Resource Advisor for all Dominate Your Market™ Programs for 5 years. She was also instrumental in developing the Team Leader Certification Program where she led several Level I and Level II programs training over 100 Team Leaders.
- Christina has also been the Summit Director since it's onset in 2017. She sources the keynote speakers, develops the agendas, and leads the Atticus Team to provide an exceptional member experience.
- Prior to her work with Atticus, she joined Red Lobster as an Operations Manager. Over the course of her 20-year career at Darden, she held several leadership roles such as Point of Sale Team Trainer, Divisional Financial Analyst and Employee Relations Manager.



ATTICUS TEAM



ATTICUS RESOURCES THAT ARE THERE TO HELP

- Growth Programs
 - Practice Growth Program™, Dominate Your Market™, Rainmakers™
- Practice Advisors, your guide to help you implement the Atticus Strategic Concepts and Business Skills that will allow you to build a Great Practice and a Great Life
- Adjunct Practice Advisors, Atticus Dominate Your Market Attorneys and Team Leaders that have been certified to teach the Atticus Strategic Concepts and Business Skills
- Practice Growth Series™, a monthly zoom webinar where Atticus Strategic Concepts are taught and discussed
- Atticus Member Portal, one stop place for Atticus Strategic Concepts, tools, materials, videos, presentations, community, and much more
- Atticus Community, Connect with like-minded law firm owners and team members, referral opportunities
- My Great Life™ Planner, quarterly planner build on Atticus Strategic Concepts and supports building your business skills
- Summit, Our Annual conference with like-minded attorneys and professionals

Available from 9 - 9:30am ET Weekdays

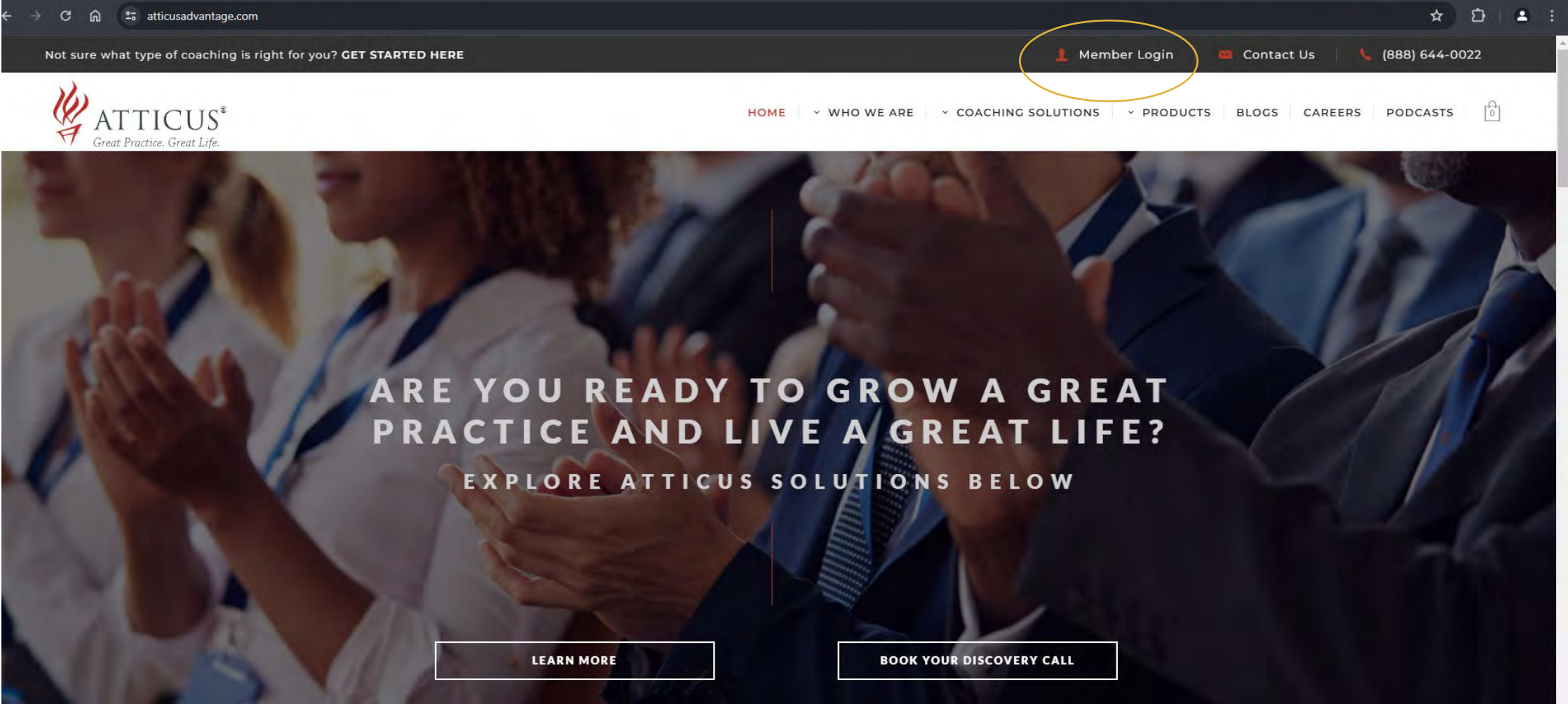
Join: <https://atticusadvantage.zoom.us/j/82688071043>

Dial: 1-646-518-9805 Meeting ID: 826 8807 1043

COACHING ON DEMAND HOTLINE



ATTICUS WEBSITE WITH ACCESS TO MEMBER PORTAL




GREAT PRACTICE, GREAT LIFE CHALLENGE

Strategies to Help You Build Your Path to a Great Practice and a Great Life

- What Does Your Great Practice and Great Life Look Like
 - To Grow, you Need Vision, Clarity and a Plan. Create it and Learn How to Execute it
- What Do You Need to Focus On to Create Your Vision
 - Immediately Start on Your Path by investing Time, Money and in People to Build Your Vision
 - Accelerate Growth with a Sherpa, Coaches, Strategies and Your Rope Team
- What Can You Learn From the Top 1%?
 - Where is Your Practice at Now? What Can You Do to Improve it in the Next 90 Days?
- Are You Ready to Break Through Your Income Ceiling?
 - Increase Your Profits to Help Pay For the Changes that will Drive Growth and Profitability
 - Learn What Key Business Skills Drive Financial Growth and Improve those Key Skills

TODAY'S AGENDA, 10 AM TO 4 PM EST

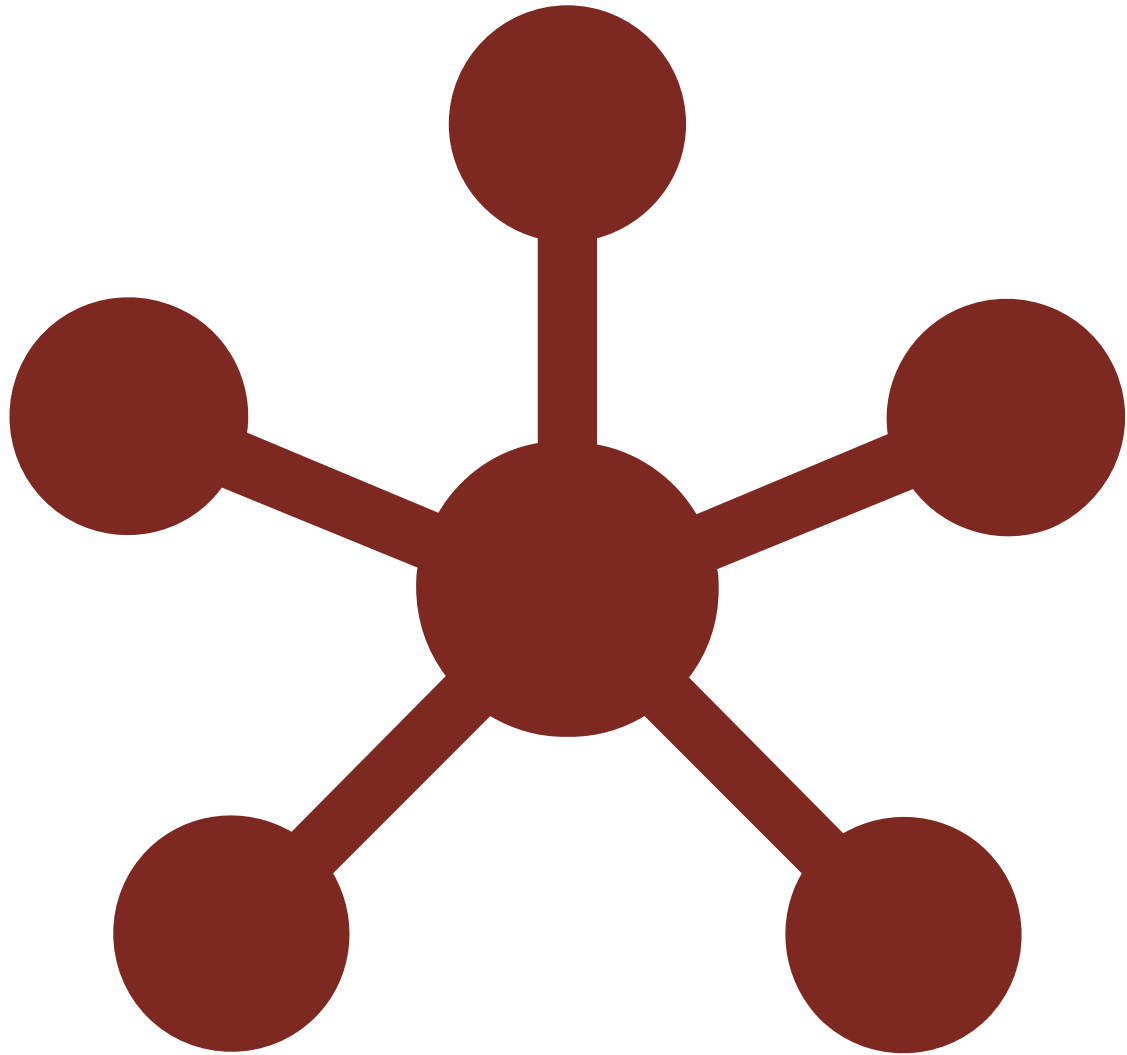
- Welcome & Overview for Our Day Together
- Bad News/Good News: Why Are You Here? How Can We Help?
- Is it Possible for Lawyers to have a Great Practice and Cultivate a Great Life? What Does Your Path Look like?
- My Great Life™: My Great Decade™
- Lunch at approximately 12:45 pm ET
- What Can You Learn from the Top 1% Attorneys
 - Gut Check on Income, Focusing Strategies, and Income Boosters
- How Can You Implement Your Plan

A black and white photograph of a mountain landscape. In the foreground, there is a dense forest of evergreen trees. In the middle ground, a calm lake reflects the surrounding mountains and sky. The background features rugged, snow-dusted mountain peaks under a cloudy sky. A white rounded rectangle is superimposed over the center of the image, containing the text "WHY ARE YOU HERE?".

WHY
ARE YOU
HERE?

BAD NEWS, GOOD NEWS WORKSHEET™

| STEP 1: MY BAD NEWS | TOP 3 |
|----------------------------------|-------|
| | |
| | |
| | |
| STEP 2: MY GOOD NEWS | TOP 3 |
| | |
| | |
| | |
| STEP 3: WHAT ARE WE DOING RIGHT? | TOP 3 |
| | |
| | |
| | |



BREAKOUT



10-MINUTE BREAK

THE CHALLENGE

Is it Possible for lawyers to have a Great Practice
while Cultivating and Living a Great Life





GROW YOUR GREAT PRACTICE

- _____
- _____
- _____
- _____



HOW TO STAY FOCUSED ON YOUR GREAT LIFE, GREAT PRACTICE JOURNEY?™

- CHOOSING BOTH: GREAT LIFE & GREAT PRACTICE
- PRACTICE ADVISOR 1 ON 1
- KEEP MOTIVATED
- FOCUS: MY GREAT LIFE PLANNER
- BETTER CLIENTS, GREATER CASES
- KEEP GROWING
- GROWTH PROGRAM WORKSHOP EVERY 90 DAYS
- CASH FLOW, PROFITABILITY
- GREATEST VACATION EVER
- BUILD YOUR GREAT TEAM
- ALWAYS LEARNING
- MORE REVENUE, MORE INCOME



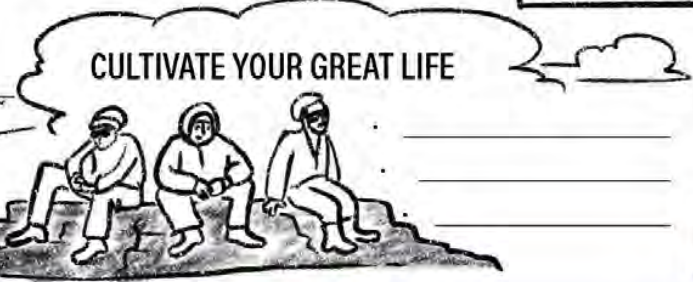
GROW AND THINK LIKE A 1% ATTORNEY

- _____
- _____
- _____



THE GREAT PRACTICE, GREAT LIFE COMMUNITY™

- _____
- _____
- _____



GROW YOUR BUSINESS SKILLS

- _____
- _____
- _____
- _____

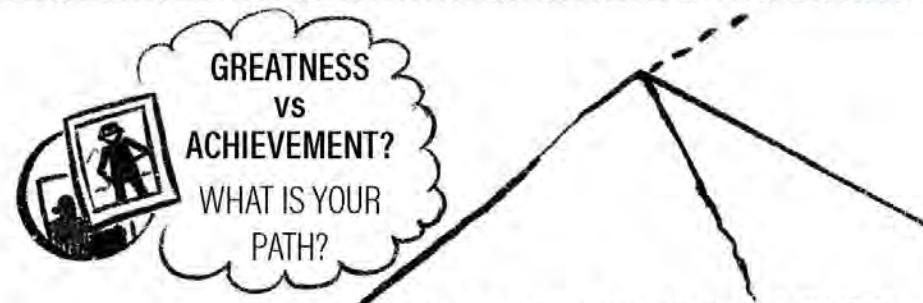
| Top 3 Insights | | |
|----------------|--|--|
| | | |

| Top 3 Actions | | |
|---------------|--|--|
| | | |



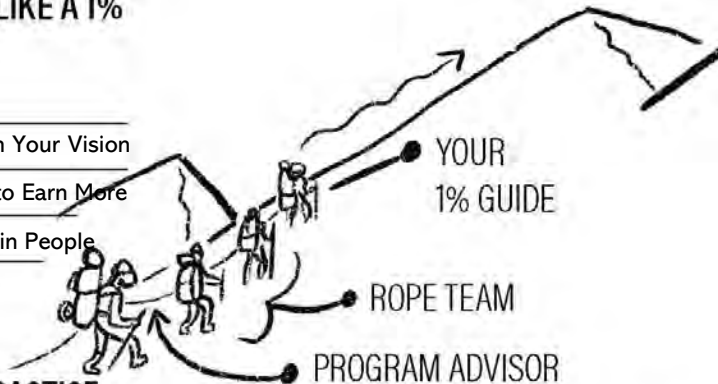
GROW YOUR GREAT PRACTICE

- Double Your Income
- Increase Profits to Pay for Improvements
- Focus on Revenue Driving Business Skills
- Increase Capacity with a Great Team



GROW AND THINK LIKE A 1% ATTORNEY

- Play for 20, 5 or 1%
- Focus & Work Daily on Your Vision
- Learn Business Skills to Earn More
- Invest Time, Money & in People



HOW TO STAY FOCUSED ON YOUR GREAT LIFE, GREAT PRACTICE JOURNEY?™

- CHOOSING BOTH: GREAT LIFE & GREAT PRACTICE
- FOCUS: MY GREAT LIFE PLANNER
- GROWTH PROGRAM WORKSHOP EVERY 90 DAYS
- PRACTICE ADVISOR 1 ON 1
- BETTER CLIENTS, GREATER CASES
- CASH FLOW, PROFITABILITY
- BUILD YOUR GREAT TEAM
- KEEP MOTIVATED
- KEEP GROWING
- GREATEST VACATION EVER
- ALWAYS LEARNING
- MORE REVENUE, MORE INCOME



THE GREAT PRACTICE, GREAT LIFE COMMUNITY™

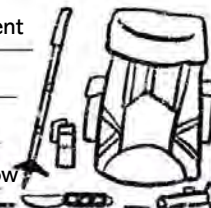
- Helping Each Other-Great Friends
- Learn More & Learn Faster
- Collaborative Competition
- Referrals

CULTIVATE YOUR GREAT LIFE



GROW YOUR BUSINESS SKILLS

- Focus/Time Management
- Client Development
- Building a Great Team
- Profitability & Cash Flow



| Top 3 Insights | | |
|----------------|--|--|
| | | |

| Top 3 Actions | | |
|---------------|--|--|
| | | |



5-MINUTE QUICK BREAK

MY GREAT LIFE®: MY GREAT DECADE™



It is not the meaning of life that matters, it is the meaning of your life that matters.



ATTICUS™

Great Practice. Great Life.

My Great Life® : My Great Decade™



Name: _____ Date: _____

| Lifetime Legacy | Top 5 Lifetime Goals | Top 10 10-Year Roles/Goals |
|-----------------|----------------------|----------------------------|
| | Role/Category: | Date: _____ Age: _____ |
| | | |
| | Role/Category: | |
| | | |
| | Role/Category: | |
| | | |
| | Role/Category: | |
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| | Role/Category: | |
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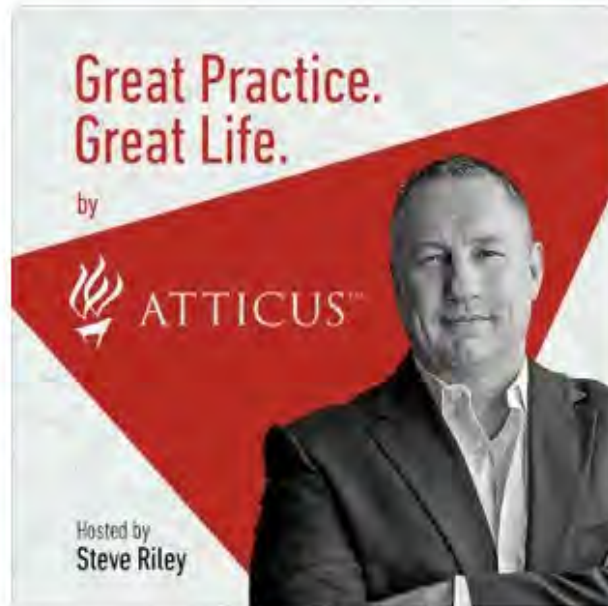
| Top 10 3-Year Roles/Goals | Top 10 1-Year Roles/Goals | Top 10 90-Day Roles/Goals |
|---------------------------|---------------------------|---------------------------|
| Date: _____ Age: _____ | Date: _____ Age: _____ | Date: _____ Age: _____ |
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| | | |

Out
to
lunch

LUNCH

PODCAST

Apple Podcasts Preview



54 min

PLAY ▶

Is It Possible for Non-Lawyers to Do Initial Meetings? with Patti Paz

Great Practice. Great Life. by Atticus™ Helping attorneys grow thriving practices, increase revenue, lower stress, and achi

Management

[Listen on Apple Podcasts ↗](#)



It can be hard to let go of control--especially as an attorney running your own law firm. One advantage of relinquishing it can be increased profitability and taking back your time to accomplish more important tasks.

Can non-lawyers successfully implement the initial meeting process with prospective clients? Steve believes they can. Attorneys often become bogged down in the details--especially in initial meetings--and spend valuable time responding to emails and offering free legal advice.

Steve's guest on this episode of Great Practice, Great Life is Patti Paz. Patti is an adjunct practice advisor, paralegal, and team leader. She also co-leads Practice Growth Programs and is Steve's co-instructor for a program teaching non-lawyers to do initial meetings.

You'll hear the three common objections attorneys have to non-lawyers conducting initial client meetings, the five Ps of an initial meeting for non-lawyers, and why a process map is crucial to teach

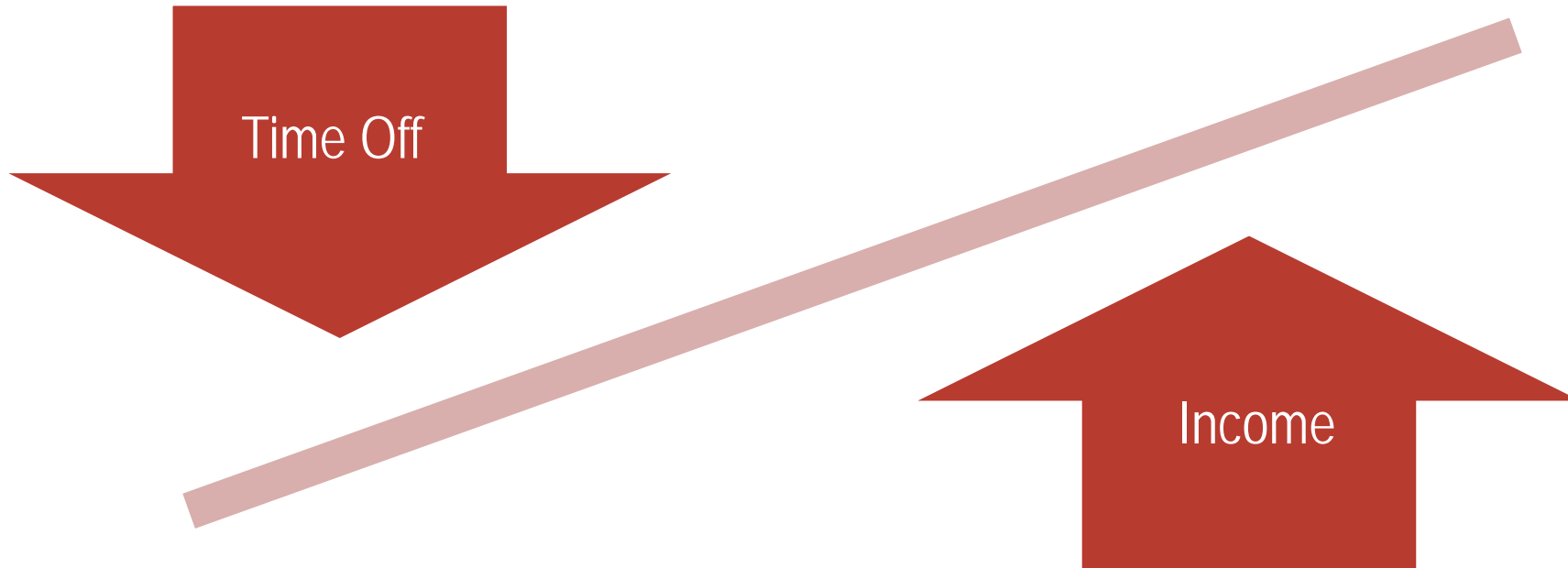
3 SUGGESTED PODCAST EPISODES

- [Breaking Into Growth: How We Grew Our Law Firm 400% Over 6 Years and Learned to Take 6 Weeks Off Annually with Jennifer & Fred Felten](#)
- [Creating a Lifetime Legacy Statement: The Foundation of a Great Life with Teresa Morgan](#)
- [How I Took Control of My Calendar and Went on a Great Life Adventure with Ed Kainen](#)

Learning From the 1% Attorney



IT IS EASY TO DRIVE UP INCOME AND REDUCE QUALITY TIME OFF - THE CHALLENGE IS TO GO FOR BOTH



THE CHALLENGE

- Build a Great Practice and Great Life-simultaneously
 - Time off allows you to be creative, gives room for your team to grow, and stops you from being trapped as the “hero” in your firm
 - Learn how to ‘cultivate’ a great life - hard for many lawyers because we are trained just to be work horses and pull the wagon. It is an easy way to live but a hard life.
- Build a Great Team
 - A Great team attracts great clients
 - Nothing makes your life easier than a remarkable team of all stars
- Focus on developing great clients, not every client is great, but it takes a while to figure out how to market and continually upgrade your clients

1%, 5%, AND 20% (INCOME AND TIME OFF)

- Upper 1% of Solo Attorneys
 - Able to take off more than 175 Days a year (no emails, no phone calls, no legal work)
 - 104 weekend days another 8 weeks per year
 - Net income exceeds \$600,000
- Upper 5%
 - Able to take off 150 Days a year (including 4 weeks vacation)
 - Net income exceeds \$500,000
- Upper 20%
 - \$300,000
 - Maybe 2 weeks

The Frazzled to Focus Advantage™

What People See

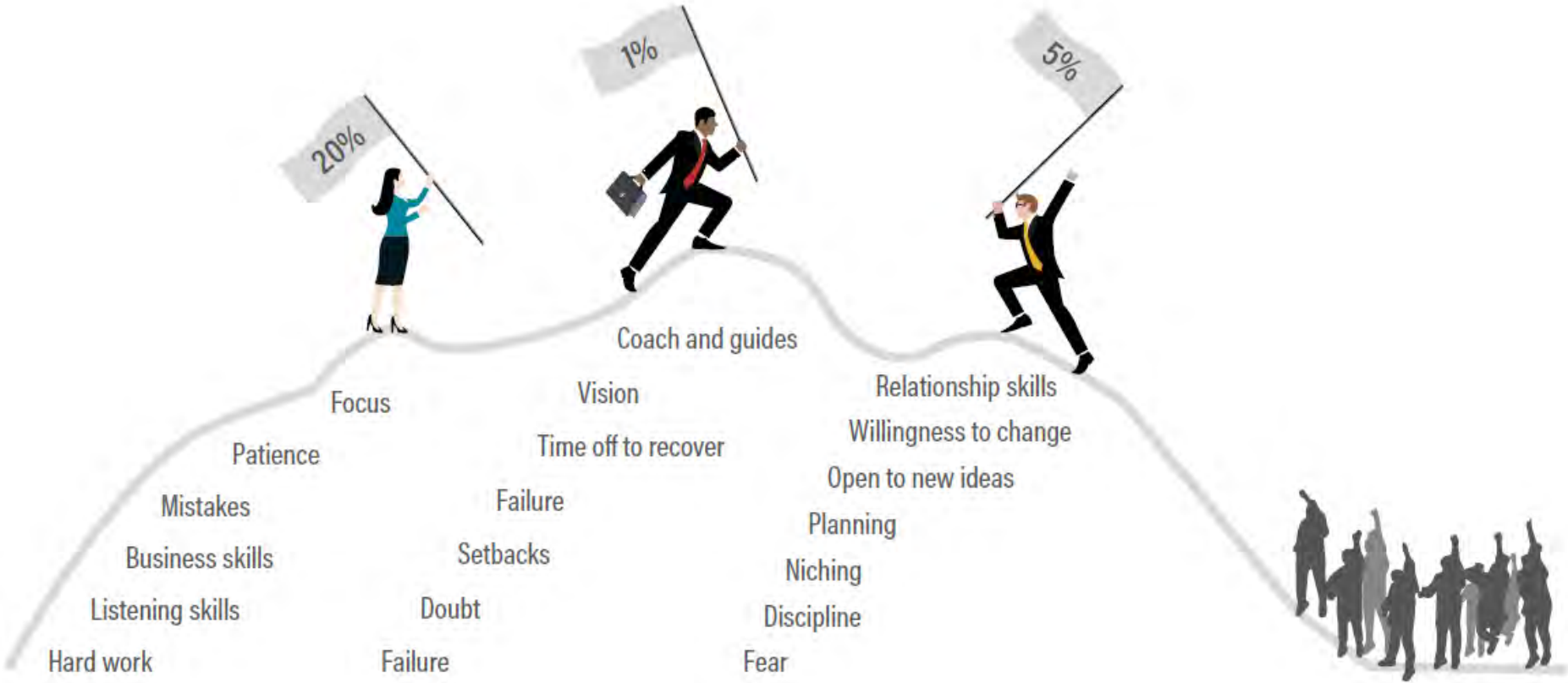


3 RULES TO CLIMB TO THE TOP 1%

- Climb Effectively
 - Not efficiently, but choosing what is the most impactful thing I need to do today to reach my short-term and long-term goals
 - What are 3 most important actions today
 - Those must align with your Great Practice and Great Life goals
- Wisely
 - Avoid going backwards
 - No “up and down” (cash flow crisis, staffing crisis, health crisis, burnout, depression)
- Safely
 - No permanent injury to you, your family, or your team. You don't want to sacrifice what is important

WHAT PEOPLE DON'T SEE

What People DON'T See



THE BIG QUESTION - WHAT ARE THE CORE STRATEGIES THAT ALLOW THEM TO CLIMB THE SUMMIT?

- What can we learn from the top performers that I can share with you?
- What are the strategic short cuts that may save you years, or even a decade to figure out?
- You don't have to use them, that is the fun part. *You can choose* whether these core strategies can help you build your own great practice and great life.

4 Core 1% Strategies





SELF-REFLECT, CHECK IN
AND ASK

HOW AM I DOING? WHERE
AM I ON MY JOURNEY?

STRATEGY 1

FUTURE GROWTH OR STAGNATION-IS HOW YOU FEEL ABOUT YOUR PRACTICE AND LIFE

The Frazzled to Focus Advantage™



THE WIND IN YOUR SAILS IS YOUR FEELING TODAY

- If you are feeling frazzled, overwhelmed, unmotivated, unhappy - your firm will regress or, if you are lucky, stay in place.
 - Conscious or unconscious does not matter - more of something bad is not something your brain is wired to provide. Your brain will start to produce avoidance techniques.
- If you are feeling okay, you will probably have an okay practice.
- If you are loving what you have, and are looking to make what you have better, you will start a continuous cycle of improvement.
- Self-learning, discovery, and your progress comes from your reflective thought.

The Frazzled to Focus Advantage™

Lifetime Strategies to Help You Go From Frazzled to Focused in Your Great Practice, Great Life Journey



| The Strategies: | Where Am I Today? | Why? |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------|
| 1. Where am I on my Journey? • Frazzled? Overwhelmed? Focused? | | |
| 2. The Great Practice, Great Life Focus - Earn Your Vision • How much time am I investing to work on My Vision • Daily, Weekly, Monthly, Quarterly 1, 3 & 10 year written plans | | |
| 3. The Great Practice, Great Life Focus - Invest in Your Vision • Greatness is not free it is earned • Investing in time, money and people? • Sherpa, Coaches, Strategies, and your Rope Team | | |
| 4. Grow Your Business Skills to Grow Your Great Practice • Learn to Earn • Business Skills Drive Financial Growth • Use The Practice Growth Formula™ • Sustainable Change Requires Leadership, Management and Always Improving Communication Skills | | |

| My Top 3 Insights | | | 3 Most Important Actions | | |
|-------------------|--|--|--------------------------|--|--|
| | | | | | |

The Frazzled to Focus Advantage™



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| My Top 3 Insights | | | 3 Most Important Actions | | |
|-------------------|--|--|--------------------------|--|--|
| | | | | | |





YOUR STRATEGIC FOCUS SKILL - A LIFETIME GAME

STRATEGY 2

The Frazzled to Focus Advantage™



Lifetime Strategies to Help You Go From Frazzled to Focused in Your Great Practice, Great Life Journey



| The Strategies: | Where Am I Today? | Why? |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------|
| 1. Where am I on my Journey? • Frazzled? Overwhelmed? Focused? | | |
| 2. The Great Practice, Great Life Focus - Earn Your Vision • How much time am I investing to work on My Vision • Daily, Weekly, Monthly, Quarterly 1, 3 & 10 year written plans | | |
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| My Top 3 Insights | | | 3 Most Important Actions | | |
|-------------------|--|--|--------------------------|--|--|
| | | | | | |

CREATE A GREAT LIFE, GREAT PRACTICE GAMEPLAN!

- What do you want a great life and a great practice to look like to you?
- 10 years out, and work your way back
 - 10, 3, 1, 90 days
- Review weekly; if possible, daily
 - How am I doing? Am I on track? What am I learning? The weekly review of progress is critical
You have to self-reflect and self-assess
 - The Learning Bridge™ process
- In writing, both typed and handwritten is preferred
- Stay the course - it is a lifetime commitment to mastery - you will get better, stronger, faster, clearer, efficient, and more importantly, effective. You gain momentum over time

TRAP 1: BUSIED ALIVE



Stressed out,
overwhelmed, and on
road to burn out

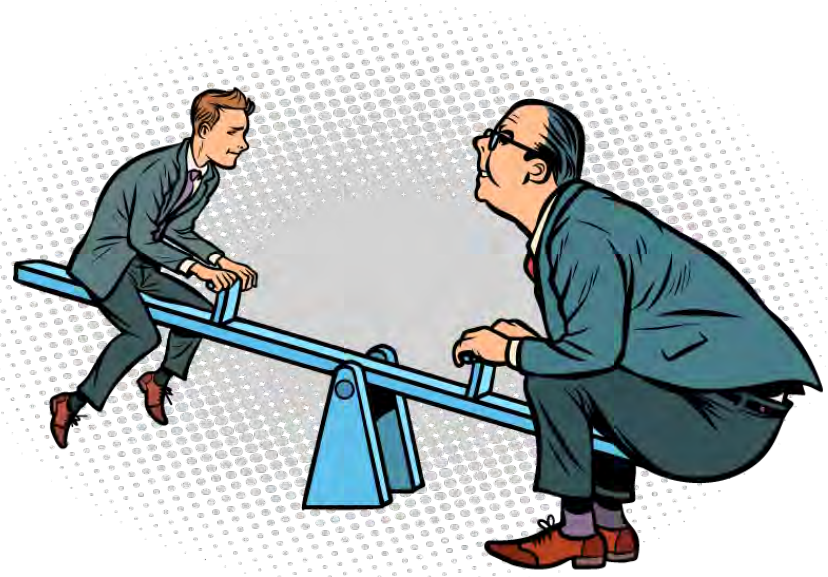
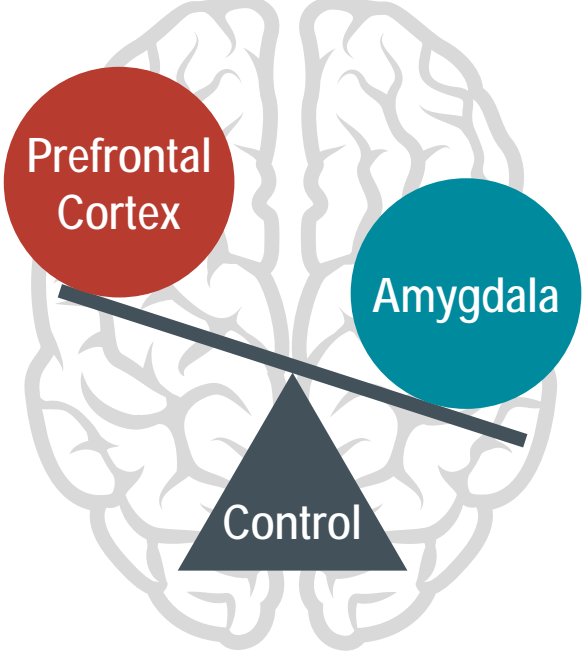
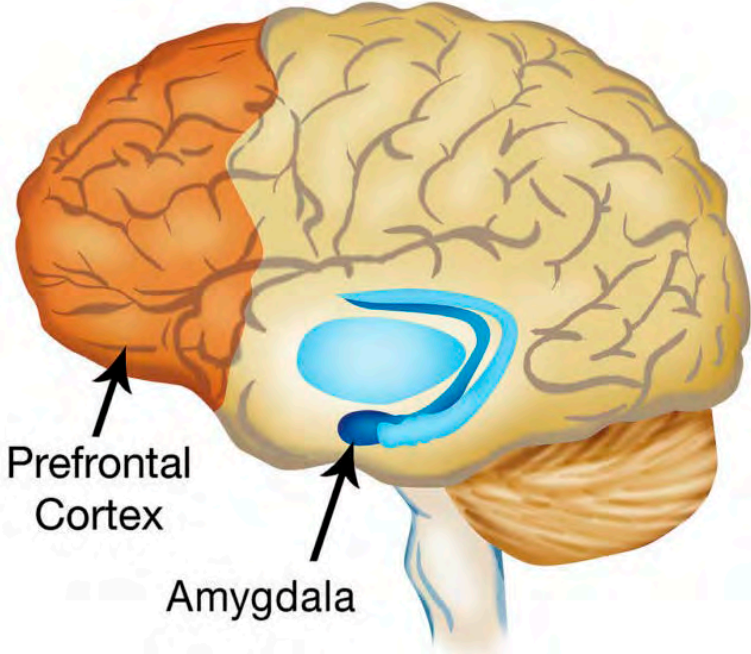


Falling, flat or stagnating
income. Not making
what they should
or deserve



Success trap – starts
to burn them out and
they don't see it

WHY THIS IS SO BAD FOR YOU

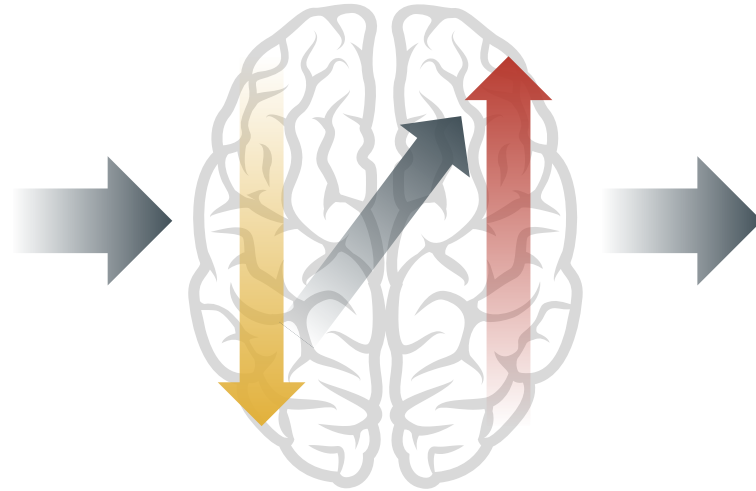


Prefrontal Cortex VS Amygdala

TRAP 2: THE FORCES OF OVERWHELM

Examples that can make you feel overwhelmed

- To-do list
- Unreturned Emails
- Unreturned voice mails
- Deadlines
- Family
- Stuff I want to do
- Projects
- Bills



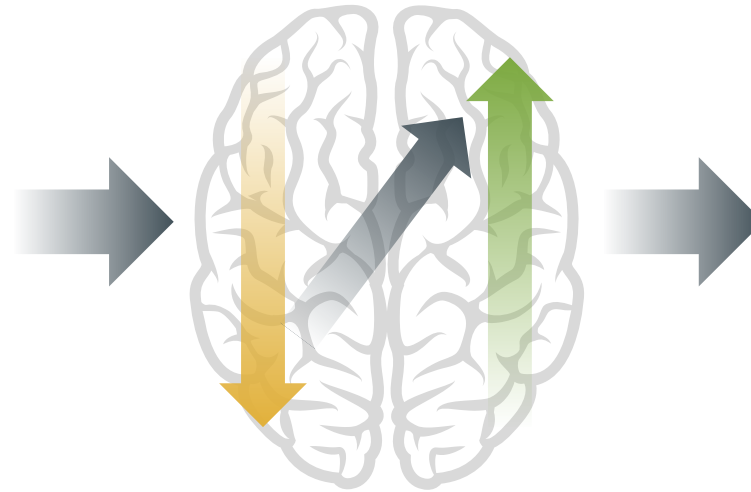
Why you are exhausted at the end of the day!

- The amygdala is running the show, so everything is prioritized by threat
- Very distractable. It is about survival, not focus
- High stress
- High noise
- Others' high stress and high noise becomes yours
- Over time, your ability to distinguish between immediate and future risk declines
- Adrenaline is a very expensive fuel. Your body pays a high price

HOW TO BREAK OUT OF THE TRAP

Slow down to speed up (using the My Great Life Planners™)

- Key strategic process – How can I be impactful and not frantic?
- Step 1 – Telling your brain what matters. Asking the right questions
- Step 2 – In writing! Puts the prefrontal cortex in control and diminishes amygdala
- What would a great week look like to you?
 - Top 10
 - What are the 3 most important
- Key is comfort, decide, prioritize, commit, and then learn



Focused on a great practice and great life!

- Prefrontal cortex in control. High judgment and critical thinking
- Focus
- Clarity
- Cut through the noise and distractions
- High impact increases confidence
- Focusing skills improve over time
- Improves brain performance and reduces use of adrenaline as an expensive fuel source

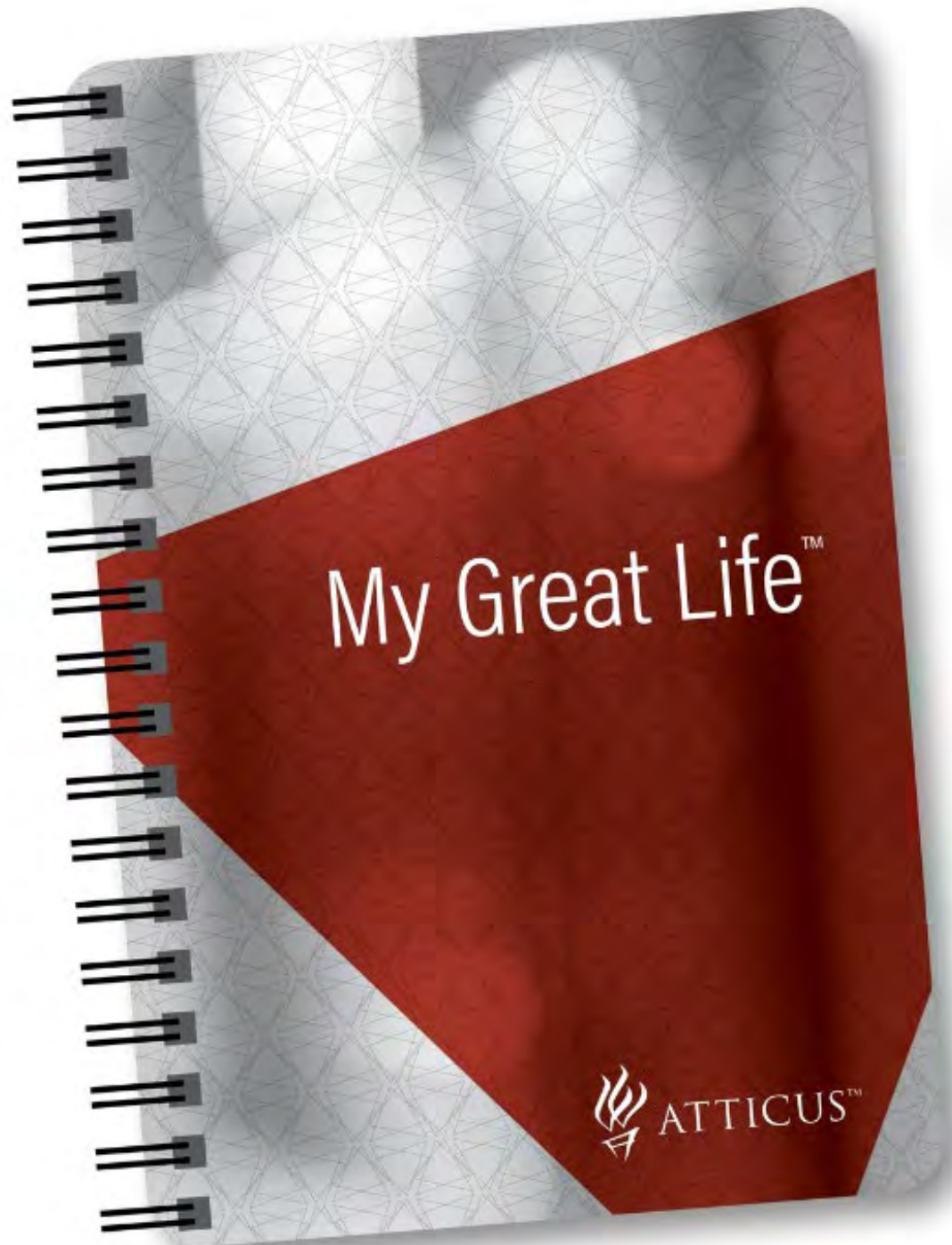
IS IT WORTH IT?

The real question is **are you worth it?**

- You don't get a great practice or great life for free. It is an earned experience.
- You pay for it.
- It is not given to you.
- How to earn it:

1. You decide if it is worth it to you.
2. You invest time to learn it.
3. You will never do it perfectly. So you will learn to deal with frustration of. Better than you were yesterday.
4. You learn to find your balance to your great life and your great practice. It is a challenge. It is never easy.
Nothing great is ever easy.

- You are going to put the time in any way, might as well play for greatness



MY GREAT LIFE™ PLANNER

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Our focus...

My Great Life™

TODAY'S DATE ____/____/____

My Lifetime Legacy

Top Lifetime Goals

| | Goals | Progress / Actions |
|----|---------------|--------------------|
| 1. | What? Why? | |
| 2. | What? Why? | |
| 3. | What? Why? | |
| 4. | What? Why? | |
| 5. | What? Why? | |

LIFETIME LEGACY

One-Year Focus™

| | |
|------------------------------------|-------------------------------------|
| 1. Area of Focus <hr/> Due Date | 6. Area of Focus <hr/> Due Date |
| 2. Area of Focus <hr/> Due Date | 7. Area of Focus <hr/> Due Date |
| 3. Area of Focus <hr/> Due Date | 8. Area of Focus <hr/> Due Date |
| 4. Area of Focus <hr/> Due Date | 9. Area of Focus <hr/> Due Date |
| 5. Area of Focus <hr/> Due Date | 10. Area of Focus <hr/> Due Date |

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ONE YEAR FOCUS

Our focus....

My 90-Day Focus™ TODAY'S DATE ____ / ____ / ____

1. Progress (%) 0 25 50 75 100

What? _____

Why? _____

2. Progress (%) 0 25 50 75 100

What? _____

Why? _____

3. Progress (%) 0 25 50 75 100

What? _____

Why? _____

4. Progress (%) 0 25 50 75 100

What? _____

Why? _____

5. Progress (%) 0 25 50 75 100

What? _____

Why? _____

6. Progress (%) 0 25 50 75 100

What? _____

Why? _____

7. Progress (%) 0 25 50 75 100

What? _____

Why? _____

8. Progress (%) 0 25 50 75 100

What? _____

Why? _____

9. Progress (%) 0 25 50 75 100

What? _____

Why? _____

10. Progress (%) 0 25 50 75 100

What? _____

Why? _____

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MY 90 DAY FOCUS PART 1

Our focus....

My 90-Day Focus™

This Quarter's Top 3 Goals:

| | |
|--------------------------|----------------------|
| Name: | Next Actions: |
| 1. Key Objective: | |
| Name: | Next Actions: |
| 2. Key Objective: | |
| Name: | Next Actions: |
| 3. Key Objective: | |

Health Builder Habit™ : One Monthly

1.

2.

3.

Habit of Building Habits™ : One Monthly

1.

2.

3.

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MY 90 DAY FOCUS PART 2

Our focus....

Month JAN FEB MAR APR MAY JUN JUL AUG SEPT OCT NOV DEC

| Monday | Tuesday | Wednesday | Thursday | Friday | Saturday/Sunday |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
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This Month's Top Activities

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MONTH

Our focus....

My Great Weekend™

Saturday would be great if... Top three goals for Saturday

1.

2.

3.

Sunday would be great if... Top three goals for Sunday

1.

2.

3.

This Weekend's Relaxation / Rejuvenation Activities

1.

2.

3.

4.

MY GREAT WEEKEND

Our focus....

MY WEEKLY REFLECTION™

___/___/___ TO ___/___/___

The Learning Bridge™

What Worked?

What Didn't Work?

| | <i>What?</i> | <i>Why?</i> | <i>What?</i> | <i>Why?</i> |
|---|--------------|-------------|--------------|-------------|
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |

Top 3 Lessons Learned

What I Learned

How Will I Improve?

| | | |
|---|--|--|
| 1 | | |
| 2 | | |
| 3 | | |

This Week I Am Grateful For

What

Why

| | | |
|---|--|--|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |

WEEKLY REFLECTION

Weekly Cash-Flow Focuser™ _____ / _____ TO _____ / _____

Cash Flow Goal:

| | Client / Matter | Value | Next Action | Deadline |
|-----|-----------------|-------|-------------|----------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |
| 5. | | | | |
| 6. | | | | |
| 7. | | | | |
| 8. | | | | |
| 9. | | | | |
| 10. | | | | |
| | Total | | | |

Top Opportunities / Marketing Actions

| | Who / What | Next Action | Deadline |
|----|------------|-------------|----------|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |

WEEKLY CASH-FLOW FOCUSER

Our focus....

THIS WEEK'S FOCUS _____ My Great Week™

| Top Goals | This Week Would Be Great If... |
|-----------|-------------------------------------------------------|
| 1. | 1. <input type="checkbox"/> |
| 2. | 2. <input type="checkbox"/> |
| 3. | 3. <input type="checkbox"/> |
| 4. | Health Builder Habit™ <input type="checkbox"/> |
| 5. | Habit of Building Habits™ <input type="checkbox"/> |
| 6. | |
| 7. | Actions / Follow-ups / Tolerations |
| 8. | |
| 9. | |
| 10. | |

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MY GREAT WEEK

Our focus....

MY GREAT DAY

Our focus....

MONDAY ___/___/___ My Great Day™

Today would be great if I...

| | |
|-----------------------------|-------|
| 1. <input type="checkbox"/> | 7 AM |
| 2. <input type="checkbox"/> | 8 AM |
| 3. <input type="checkbox"/> | 9 AM |
| | 10 AM |
| | 11 AM |
| | 12 PM |
| | 1 PM |
| | 2 PM |
| | 3 PM |
| | 4 PM |
| | 5 PM |
| | 6 PM |
| | 7 PM |

Bonus 3 Tasks

| | |
|-----------------------------|--|
| 1. <input type="checkbox"/> | |
| 2. <input type="checkbox"/> | |
| 3. <input type="checkbox"/> | |

3 Marketing Activities

| | |
|-----------------------------|--|
| 1. <input type="checkbox"/> | |
| 2. <input type="checkbox"/> | |
| 3. <input type="checkbox"/> | |

Health Builder Habit™

Habit of Building Habits™

Today's Win / Insights

| | |
|----|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |

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The Tolerations Worksheet™



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TOLERATIONS

Our focus....

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="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
- 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

ATTICUS DAILY FOCUSER™

3 COMMON OBJECTIONS TO THIS APPROACH

- I don't have the time
 - You never will if you don't start somewhere
- This is stupid, and you are stupid for suggesting it
 - You are probably right
- This will never work
 - You are most definitely right - don't do it. It will just annoy you.

The Frazzled to Focus Advantage™

Lifetime Strategies to Help You Go From Frazzled to Focused in Your Great Practice, Great Life Journey



| The Strategies: | Where Am I Today? | Why? |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------|
| 1. Where am I on my Journey? • Frazzled? Overwhelmed? Focused? | | |
| 2. The Great Practice, Great Life Focus - Earn Your Vision • How much time am I investing to work on My Vision • Daily, Weekly, Monthly, Quarterly 1, 3 & 10 year written plans | | |
| 3. The Great Practice, Great Life Focus - Invest in Your Vision • Greatness is not free it is earned • Investing in time, money and people? • Sherpa, Coaches, Strategies, and your Rope Team | | |
| 4. Grow Your Business Skills to Grow Your Great Practice • Learn to Earn • Business Skills Drive Financial Growth • Use The Practice Growth Formula™ • Sustainable Change Requires Leadership, Management and Always Improving Communication Skills | | |

| My Top 3 Insights | | | 3 Most Important Actions | | |
|-------------------|--|--|--------------------------|--|--|
| | | | | | |

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FIND HELP: GUIDES, COACHES, AND STRATEGY

STRATEGY 3

The Frazzled to Focus Advantage™



Lifetime Strategies to Help You Go From Frazzled to Focused in Your Great Practice, Great Life Journey



| The Strategies: | Where Am I Today? | Why? |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------|
| 1. Where am I on my Journey? • Frazzled? Overwhelmed? Focused? | | |
| 2. The Great Practice, Great Life Focus - Earn Your Vision • How much time am I investing to work on My Vision Daily, Weekly, Monthly, Quarterly 1, 3 & 10 year written plans | | |
| 3. The Great Practice, Great Life Focus - Invest in Your Vision • Greatness is not free it is earned • Investing in time, money and people? • Sherpa, Coaches, Strategies, and your Rope Team | | |
| 4. Grow Your Business Skills to Grow Your Great Practice • Learn to Earn • Business Skills Drive Financial Growth • Use The Practice Growth Formula™ • Sustainable Change Requires Leadership, Management and Always Improving Communication Skills | | |

| My Top 3 Insights | | | 3 Most Important Actions | | |
|-------------------|--|--|--------------------------|--|--|
| | | | | | |

CLIMB EFFECTIVELY, SUSTAINABLY AND SAFELY

- Coaches are like Sherpas
 - They have strategy (short cuts)
 - They have contacts
- Rope team
 - Collaborative competition
 - Faster learning
 - Someone is holding your rope and you are holding theirs. You will need them and they will need you.





The Frazzled to Focus Advantage™



Lifetime Strategies to Help You Go From Frazzled to Focused in Your Great Practice, Great Life Journey



| The Strategies: | Where Am I Today? | Why? |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------|
| 1. Where am I on my Journey? • Frazzled? Overwhelmed? Focused? | | |
| 2. The Great Practice, Great Life Focus - Earn Your Vision • How much time am I investing to work on My Vision • Daily, Weekly, Monthly, Quarterly 1, 3 & 10 year written plans | | |
| 3. The Great Practice, Great Life Focus - Invest in Your Vision • Greatness is not free it is earned • Investing in time, money and people? • Sherpa, Coaches, Strategies, and your Rope Team | | |
| 4. Grow Your Business Skills to Grow Your Great Practice • Learn to Earn • Business Skills Drive Financial Growth • Use The Practice Growth Formula™ • Sustainable Change Requires Leadership, Management and Always Improving Communication Skills | | |

| My Top 3 Insights | | | 3 Most Important Actions | | |
|-------------------|--|--|--------------------------|--|--|
| | | | | | |



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BUILD YOUR BUSINESS SKILLS

STRATEGY 4

The Frazzled to Focus Advantage™

Lifetime Strategies to Help You Go From Frazzled to Focused in Your Great Practice, Great Life Journey



| The Strategies: | Where Am I Today? | Why? | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|--------------------------|--|
| 1. Where am I on my Journey? • Frazzled? Overwhelmed? Focused? | | | |
| 2. The Great Practice, Great Life Focus - Earn Your Vision • How much time am I investing to work on My Vision • Daily, Weekly, Monthly, Quarterly 1, 3 & 10 year written plans | | | |
| 3. The Great Practice, Great Life Focus - Invest in Your Vision • Greatness is not free it is earned • Investing in time, money and people? • Sherpa, Coaches, Strategies, and your Rope Team | | | |
| 4. Grow Your Business Skills to Grow Your Great Practice • Learn to Earn • Business Skills Drive Financial Growth • Use The Practice Growth Formula™ • Sustainable Change Requires Leadership, Management and Always Improving Communication Skills | | | |
| My Top 3 Insights | | 3 Most Important Actions | |
| | | | |

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MORE THAN JUST BEING GREAT AT THE LAW



OVERWEIGHTED FOCUS FOR AN OWNER



BUSINESS SKILLS



The Frazzled to Focus Advantage™



Lifetime Strategies to Help You Go From Frazzled to Focused in Your Great Practice, Great Life Journey



| The Strategies: | Where Am I Today? | Why? |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------|
| 1. Where am I on my Journey? • Frazzled? Overwhelmed? Focused? | | |
| 2. The Great Practice, Great Life Focus - Earn Your Vision • How much time am I investing to work on My Vision • Daily, Weekly, Monthly, Quarterly 1, 3 & 10 year written plans | | |
| 3. The Great Practice, Great Life Focus - Invest in Your Vision • Greatness is not free it is earned • Investing in time, money and people? • Sherpa, Coaches, Strategies, and your Rope Team | | |
| 4. Grow Your Business Skills to Grow Your Great Practice • Learn to Earn • Business Skills Drive Financial Growth • Use The Practice Growth Formula™ • Sustainable Change Requires Leadership, Management and Always Improving Communication Skills | | |

| My Top 3 Insights | | | 3 Most Important Actions | | |
|-------------------|--|--|--------------------------|--|--|
| | | | | | |



10-MINUTE BREAK

Your Action Plan



The Gut Check™ Scorecard - Income: am I making what I should?

| | Frazzled | Frustrated | Fine | Focused | Fulfilled | Score |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| Criteria | 1 | 2 | 3 | 4 | 5 | |
| The Great Practice, Great Life Challenge™ The beauty of running your own practice is autonomy over your life. You get to design both: a great life and a great practice. Use what you learn today to choose a new start tomorrow. | Sometimes I feel frazzled. It sometimes feels like I am falling, or at least struggling with both my practice and my life. I worried I might be burned out. I am not sure if this slog is worth it. I am hopeful that things will change, but I am not sure where to start. But, I am afraid if I try something new it might make things worse. | I feel frustrated. I don't think I know how to unlock my potential or my team's potential. I feel with a little more work I can "turn the corner" soon. My primary focus is on increasing my income and building my practice. Once I make enough money my "great life" will take care of itself. I might have a few "blind spots" that are holding me back. | I feel successful, but often I feel "trapped" by my own success. Sometimes I feel like I am stuck on a "treadmill" running fast but getting nowhere. I am worried that if I make changes I will wreck what is working. I have great practice but the great life could use some work. I maybe over working but isn't that the price of being successful? | My practice is doing great. I am at the top of our market and feel like we are the dominant firm. I am really confident in how well my firm is doing. I am not too worried about my great life because my sacrifices are necessary to be on top. My family understands I must work so hard and long to take care of everything. | I am growing a Great Practice, and cultivating a great life. When my friends ask how I am doing it, I tell them but they dismiss my advice because that "would never work." I put a lot of time, effort, and investment in to my practice and life, and it feels good to see it working. Sometimes I feel guilty because everything is working so well. I am fulfilled, happy, and occasionally joyful (but don't tell the bar) | |
| Net Income-how do I rank? Am I doing better, worse, the same, or crushing it in comparison to other solo attorneys? The assumptions are: practicing more than 8 years, solo more than 2 years, working full time and great owner benefits (health insurance, retirement plans, etc.,) | Income is 0 (or losing money) to \$75,000. I am working too hard for too little. I am going to try and outwork the problem. Sooner or later, I will get ahead. If I can just keep working on my legal skills soon everyone will know I am a "great lawyer." If I can learn how to be a better lawyer the money will naturally follow. The next CLE will make the difference. | Income \$75,000 to \$140,000. I feel pretty good, but I think could do better. I am gaining confidence in my pricing, referral sources, and improving my time management. I am learning how to niche. I am learning to be more selective on clients and hiring. But, I am frustrated with getting better clients, long hours, and not finding a good team. (Note: once you break \$128,000 you are above the average for all attorneys Congratulations!) | Income \$140,000 to \$300,000. I think I am successful. I feel like my practice and referral sources are sustainable. Cash flow is consistent. I am not sure if I personally can manage more clients or more work. I am seriously considering hiring an associate or more paralegals but I don't think I can manage more people either. I don't think working more is the right answer. (\$140,000 to \$240,000 is considered "average" solo) | Income \$300,000 to \$600,000. I am doing great. I am starting to appreciate the business skills that allow me to hire, train, and leverage other professionals. I realize that the I can "scale" and grow based on management systems, processes, and trained team leaders. (Note: \$300,000 to \$600,000 is considered upper 20% to 10%-Great job!) | Income exceeds \$600,000. I own a great practice. I feel like we are breaking free of the gravitational pull of typical practices. My primary focus is on business skills over legal technical skills. The more I invest in the team, and the less legal work I do, the more profitable we become. It feels weird, almost counterintuitive. (10% to upper 1% of solo small firm. Some Solo's are in excess of \$1,000,000 in net income but most of the income is driven by firm profit centers than their personal production, see below.) | |
| In addition to my income, is my practice profitable? One of the key ways of building a great practice is to build profit centers inside the practice. This is a core business skill of some of the top income earners and the most valuable practices. The profit centers should drive more income to the owner. | I pay myself a small base because my CPA says I must. At the end of the year, I pull out whatever is left and consider this my "profit." Everything feels financially tight. When I have a cash flow problem I need to rely on lines of credit and credit cards to get by. If I just work hard and longer I can do better next year. | I pay myself a low base. When I feel like I can afford it I will distribute profits out when I think I have enough money. I don't I am doing a good job of thinking through my profit margins or planning for profits in my firm. I feel like I could do better but not sure how. I feel like I am working and stretched thin, this just sounds like more stuff to do. | I am starting to see that if and when I leverage other professionals (associates, paralegals, legal assistants) I can drive profitability. I think I might be adding \$10,000 to maybe as high as \$50,000 in profits to the practice but I am not sure. I just feel like I am profitable when others are doing their work. | I am starting to see where my business skills pay off. I am learning how to build, leverage, and manage independent profit centers. For example, trust and probate administration services are its own profit center with its own manager. (\$200,000 and up are common in this practice). | The investment into business skills, people, management systems, and team leaders is producing a significant ROI. A significant portion of my income is coming out of profits rather than my own personal production. I understand that once the profit center is built I can market into this profit center and scale it. The key to great profitability is great team managers. (\$350,000 and up seem to be a common threshold in this practice) | |
| Do I own my practice or does my practice own me? You can work a bunch to pump up income, but it is guaranteed way to burn out for you and your team. This approach usually leads to being stuck at an income level for years, and ultimately burnout and consistent staff turnover. The key is the business skill to build a self-managing team and to take significant time off to boost your energy and creative problem-solving skills. (A day off is 24 hours of no form of work) | I love practicing, but sometimes I feel like I work 24/7. 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 check email early, late, and on weekends. I have not had more than a solid week off (no emails, phone calls, emergencies) in over a year. Working more than anyone else is the only way to grow, right? I am pretty sure the firm owns me. | I get in early and stay late. I am on my phone or checking constantly. I do get weekends, and holidays off but I feel anxious when I don't check my emails while out of the office so I check my email when I am off. I could easily pull off a 3-day weekend, but my anxiety about not checking emails or phone messages usually wins out. Besides, really successful attorneys don't take time off. Maybe, just maybe, my firm owns me. | I am focused at work. I take at least one two week vacation annually. I take most weekends off and holidays. When I am off, I seldom check email or phone messages. I only deal with emergency issues. I am confident my team can handle most emergencies. My firm owns me, but I love that I feel really important. | I am very focused at work on my highest-leverage activities. I don't work weekends. Sometimes I can pull off a four-day work week. I average four weeks a year off. While I am off, I do not check email or phone messages. Rarely do I get an emergency. I am very confident that my team can handle most emergencies. My firm is owned by me, but occasionally it tries to control me. | 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. I feel like I am the owner and leader of my firm. I am confident I own the firm and the firm does not own me. I see the firm as an asset that will produce a significant income for me long term and with the right leadership team in place to be a very sellable business. | |
| Am I investing in the skills that drive growth? The growth driver of my income and my free time are my business skills. Being a great lawyer is the start; the real key to growth is investing in your business skills. How are you investing your time and money into becoming better at your business skills? | I am struggling to find the time and money to invest to improve my business skills. My key strategy is to outwork everyone. I don't have any time to plan or know how to get better. I am kind of making it up as I go along. Plus, if I did have the time to work on my business skills I would rather use that time to catch up on client work. I am doing the best I can! (Investing under an hour a week.) | I think some business skills might be important, but I am not ready to invest to get better. I read books, the listserv, and learn here and there. I ask other lawyers for their opinions or tips. I really don't have a structure or process for thinking about or growing my practice. I feel like something is missing. I feel overwhelmed and I am not sure what to do to get things moving. (1 to 3 hours per week on my business skills.) | The business skills I am focused on are time management, marketing, cash flow, and building a great team. I am making slow and steady progress. I review my goals/plan every 90 days. Growth is steady, and I am learning how to grow my business skills to impact my profitability. I invest 2% or more and one day or more into the business skills of myself and my team. | My team and I are happy with our progress. We are committed to reviewing and improving our implementation of our plan on at least a monthly basis. Growth is consistent. I invest more than two days a week and at least 3 percent in my and my team's business skills. | My team and I are growing. We work on our strategic plan in 90-day increments. Growth and profitability are strong. I invest more than 50% of my time in the business side and comfortably invest 3 to 5% into business skills for me and my team. The leadership team is strong, and I am confident that I have a legacy firm. | |

| Top 3 Insights | | |
|----------------|--|--|
| | | |

| Top 3 Actions | | |
|---------------|--|--|
| | | |

The Gut Check™ Scorecard for Team Leaders



| | Frazzled | Frustrated | Fine | Focused | Fulfilled | Score |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| Criteria | 1 | 2 | 3 | 4 | 5 | |
| <p>The Great Practice, Great Life Challenge™ The beauty of being supported by the attorney/owner gives you the opportunity to design a great life and help them build a great practice. Use what you learn today to choose a new start tomorrow.</p> | Sometimes I feel frazzled. It sometimes feels like I am failing, or at least struggling with both the practice and my life. I am worried I might be burned out. I am not sure if this slog is worth it. I am hopeful that things will change, but I am afraid if I by something new it might make things worse. | I feel frustrated. I don't think I know how to unlock my potential or the team's potential. I feel with a little more work I can "turn the corner" soon. My primary focus is to help build a great practice and a great team. I might have a few "blind spots" that are holding me back. | I feel successful, but often feel "trapped" by my own success. Sometimes I feel like I am stuck on a "treadmill" running fast but getting nowhere. I am worried if we make changes, we will wreck what is working. I may be overworking but isn't that the price of being successful? | The practice is doing great. We are at the top of our market and feel like we are a dominant firm. I am really confident in how well the firm is doing. I am not too worried about My Great Life because my sacrifices are necessary for the firm to be on top. My family understands I must work so hard and long to take care of everything. | We are growing a Great Practice, and cultivating a Great Life. When my friends ask how I am doing it, I tell them but they dismiss my advice because that "would never work". I put a lot of time and effort into the practice and my life, and it feels good to see it working. Sometimes I feel guilty because everything is working so well. I am fulfilled, happy, and occasionally joyful. | |
| <p>Am I helping the attorney/owner build a great practice and a great team? Key indicators are good work flow, increased productivity, and having processes and procedures in place to protect the focus and time of everyone in the practice: the attorney/owner, the team and you.</p> | I am frazzled. My team interrupts me at every turn. And I allow it. I answer their questions instead of asking them questions and empowering them. They do not feel they can move forward without talking with me. | Did I mention I am still allowing my team to interrupt me. I feel frustrated because I am still allowing it. I want to empower them, but it takes time and effort that I don't feel like I have. | I feel hopeful. We are building processes and procedures to train and empower the team. I am understanding that this is a vital missing piece and is one of the reasons for the interruptions, bottlenecks and work flow issues. | I am focused and so is our team. We are 75 % there on creating processes and procedures. I have training in place and on the calendar to get the team "re-trained". The time I have spent on this has an unmeasurable ROI. I should have done this years ago. | The investment of time and energy has paid off. All our process and procedures are in place. We are now working on checklists. The team has ownership in the new approach and are helping to manage flow and leverage time by sharing ideas on how to improve them. They feel empowered and appreciated. I feel confident if I am out of the office for 3 months, our team will not run screaming from the office. | |
| <p>Is the practice profitable? Are there profit centers in place? One of the key ways to build a great practice is to help build profit centers inside the practice. The profit centers should focus on how the attorney's/owner's time is allocated and drive income for the attorney/owner.</p> | What's a profit center? I am just trying to protect the attorney's time by doing what I can to help. If I just work harder and longer, we can do better next year. | How do I build a profit center? I don't know what the profit margins are for the firm. I feel like I should help build a profit center, but I am already stretched thin, this just sounds like more stuff to do. | I am starting to understand that if and when we leverage other professionals (associates; paralegals, legal assistants), we can drive profitability. I feel like the firm is profitable when others are doing their work. | I am starting to see where our business skills pay off. We are learning how to build, leverage, and manage independent profit centers. For example, trust and probate administration services are its own profit center with its own team lead. | The investment into business skills, people management systems, and team leaders is producing a significant ROI. Profits are coming from profit centers rather than my own personal production or the attorney's/owner's personal production. We understand that once the profit center is built, we can market into this profit center and scale it. The key to great profitability is great team leaders. | |
| <p>Am I taking care of myself so I am able to support the attorney/owner and the team? You can work a bunch to pump up income, but it is a guaranteed way to burn out for you, and your team. This approach usually leads to burnout and consistent staff turnover. The key is the business skill to build a self-managing team and to take time off to boost your energy and creative problem-solving skills. (A day off is 24 hours of no form of work.)</p> | I love team leading, but sometimes I feel like I work 24/7. I work most weekends, and if I am not working, I am on my phone or checking my email while out of the office. I check email early, late and on weekends. I have not had more than a solid week off (no email, phone calls, emergencies) in over a year. I am not taking very good care of myself. | I get in early and stay late. I am on my phone or checking it constantly. I do get weekends and holidays off but I feel anxious when I don't check my emails while out of the office so I check my email while I am off. The attorney/owner wants me to take more time off, but my anxiety about not checking emails and phone messages usually wins out. I think I should be taking better care of myself. | I am focused at work. I take at least one week of vacation annually. I take most weekends off and holidays. When I am off, I seldom check email or phone messages. I only deal with emergency issues. I am confident our team can handle most emergencies. (It's a start to taking better care of myself, but I love that I feel really important to the attorney/owner and my team.) | I am very focused at work on my team leading. I don't work weekends. I average two weeks a year off. While I am off, I do not check email or phone messages. Rarely do I get an emergency call while I am off. I am very confident that my team can handle most emergencies. I am taking care of myself and I am able to take care of the attorney/owner and team at a high level. | I am taking uninterrupted time off and the attorney/owner is taking 175 days off a year. While we are off we don't check emails, do client work, or take phone calls. We see the firm as an asset that will support our team and with the right leadership team in place it can be a very "sellable" business. I am taking great care of myself which reflects on the health of the firm. | |
| <p>Am I investing in the skills that drive the firm's growth? The growth driver of my income and my free time are my business skills. Being a great team leader is the start; the real key to growth is investing in your business skills. How are you investing your time and money into becoming better at your business skills?</p> | I am struggling to find the time and ask for the money to invest to improve my business skills. Our key strategy is to outwork everyone. I don't have time to plan or know how to get better. I am kind of making it up as I go along. Plus, if I did have the time to work on my business skills, I would rather use that time to catch up on client work. I am doing the best that I can! I am investing under an hour a week to improve my business skills. | I think some business skills might be important, but I am not ready to invest to get better. I read books, the listserve, and learn here and there. I ask other team leaders for their opinions or tips. We really don't have a structure or process for growing the practice. I feel like something is missing. I feel overwhelmed and I am not sure what to do to get things moving. I invest 1 to 3 hours a week on my business skills. | The business skills I am focused on are time management, marketing, cash flow, and building a great team. I am making slow and steady progress. I review my goals/plan every 90 days. Growth is steady, and I am learning how to grow my business skills to impact the firm's profitability. We invest 2% or more one day or more into the business skills for the attorney/owner, myself and the team. | The attorney/owner, myself and the team are happy with our progress. We are committed to reviewing and improving our implementation or our plan on at least a monthly basis. Growth is consistent. We invest more than two days a week and at least 3% into the business skills for the attorney/owner, myself and the team. | The attorney/owner, myself and the team are growing. We work on our strategic plan in 90-day increments. Growth and profitability are strong. We invest more than 50% of the attorney/owner's time in the business side and comfortably invest 3% to 5% into the business skills for the attorney/owner, myself and the team. The leadership team is strong and we can confidently say we have a legacy firm. | |

| Top 3 Insights | | |
|----------------|--|--|
| | | |

| Top 3 Actions | | |
|---------------|--|--|
| | | |

The Income Booster™ Sprints



INCOME BOOSTER STRATEGIES

Pick 3 projects and spend 30 minutes on each in the next 30 days.

Name: _____ Date: _____

Total Commitment for the 30 days is 90 minutes boosting your income.

| Pick only 3; Focus; Move fast! | 3 "Boost" Projects | Next Action Who can help? How Fast? | Date |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|----------------------------------------|------|
| 1. Top 3 Cash Flow Actions Next 30 days <ul style="list-style-type: none"> • Focus on top 3 dollar cases • Clean up any outstanding A/R | | | |
| 2. Improve Client Quality <ul style="list-style-type: none"> • Say yes to A (great) and B (good) cases • Fire at least one bad client | | | |
| 3. Raise Revenue Per Case <ul style="list-style-type: none"> • Hourly - Raise rates or realization • Fixed - Increase price, avoid discounting • Contingent - Raise minimum case value | | | |
| 4. Act on Referral Based Marketing <ul style="list-style-type: none"> • Make 5 direct, verbal referral asks • Implement marketing incentive | | | |
| 5. Increase Your Capacity (Great Team) <ul style="list-style-type: none"> • What is one simple process you can delegate? • What is one thing you can train your team on? • How can I leverage the use of technology(AI)? | | | |

THE INCOME BOOSTER™ SPRINTS

Top 3 Cash Flow Actions Next 30 days

- Focus on top 3 Dollar cases
- Clean up any outstanding A/R

Do, or Improve Client Intake Matrix™

- Say Yes, to only A(great) and B(good) cases
- Fire at least one bad client

Raise Revenue Per Case

- **Hourly** - Raise rates or realization
- **Fixed** - Increase price, avoid discounting
- **Contingent** - Raise minimum case value

THE INCOME BOOSTER™ SPRINTS

Get New, Better Clients and Cases

- Make 5 direct, verbal, referral asks
- Implement Marketing Incentive

Increase Your Capacity (Great Team)

- What is one simple process you can delegate?
- What is one thing you can train your team on?
- How can I leverage the use of technology(AI)?

The Income Booster™ Sprints



INCOME BOOSTER STRATEGIES

Pick 3 projects and spend 30 minutes on each in the next 30 days.

Name: _____ Date: _____

Total Commitment for the 30 days is 90 minutes boosting your income.

| Pick only 3; Focus; Move fast! | 3 "Boost" Projects | Next Action Who can help? How Fast? | Date |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|----------------------------------------|------|
| 1. Top 3 Cash Flow Actions Next 30 days <ul style="list-style-type: none"> • Focus on top 3 dollar cases • Clean up any outstanding A/R | | | |
| 2. Improve Client Quality <ul style="list-style-type: none"> • Say yes to A (great) and B (good) cases • Fire at least one bad client | | | |
| 3. Raise Revenue Per Case <ul style="list-style-type: none"> • Hourly - Raise rates or realization • Fixed - Increase price, avoid discounting • Contingent - Raise minimum case value | | | |
| 4. Act on Referral Based Marketing <ul style="list-style-type: none"> • Make 5 direct, verbal referral asks • Implement marketing incentive | | | |
| 5. Increase Your Capacity (Great Team) <ul style="list-style-type: none"> • What is one simple process you can delegate? • What is one thing you can train your team on? • How can I leverage the use of technology(AI)? | | | |

What We've Covered Today

- Bad News, Good News
 - Opportunity
 - Frustrations
 - Keep Doing
- My Great Life®: My Great Decade™
 - Lifetime Legacy
 - 5 Lifetime Goals
 - 10 Year Goals
- Learning From the 1%
 - Frazzled to Focused
 - Self Reflection
 - Focusing
 - Find Help
 - Business Skills
- The Income Booster™
 - Impact in 30 days

My 30-Day Focus™ Great Practice. Great Life.



Name: _____ Date: _____

| Ideas from the Workshop | Top 5 Goals | Most Important Insight from Today |
|-------------------------|----------------------------|--------------------------------------|
| | Income Booster #1 | |
| | Income Booster #2 | |
| | Gut Check Action | |
| | Frazzled to Focused Action | |
| | My Great Life® Action | |
| | | Most Important Action to Take |
| | | |

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My 30-Day Focus™ Great Practice. Great Life.



Name: MINNIE MOUSE

Date: TODAY'S DATE

| Ideas from the Workshop | Top 5 Goals | Most Important Insight from Today |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Planner use Daily focuser Accountability Raise my rates Fire a bad client Define my ideal client Review MGL - MG Decade w/ Mickey Marketing Game | Income Booster #1 | I can see where small steps have an opportunity to make a very big difference in my life/practice. |
| | Raise my rates by \$150/hour | |
| | Income Booster #2 | |
| | Implement Marketing Game to incentivize testimonials and referral asks. | |
| | Gut Check Action | |
| | Most Important Action to Take | Improve my time management by using My Great Life Planner consistently. I will start by watching the course on the Member Portal. |
| | Use MGL Planner on a daily basis. | Frazzled to Focused Action |
| | | Commit to an accountability/buddy coach/rope team. |
| | | My Great Life® Action |
| Review MGL with my significant other or partner. | | |

HOMEWORK

- If you were not able to complete your My Great Life™ (MGL), do so by EOB
Monday, September 16, 2024
- For Accountability, send these completed forms to your Advisors:
 - My Great Life®: My Great Decade™
 - My 30-Day Focus
 - The Income Booster™ Sprints
 - The Gut Check™ Scorecard

SAVE THE DATE

Take advantage of this unique opportunity!



THE SUMMIT™
NATIONAL SOLO & SMALL LAW FIRM CONFERENCE 

NOVEMBER 14 & 15, 2024

ORLANDO, FLORIDA

Final Thoughts & Questions



ATTICUS™

Great Practice. Great Life.