

STATEMENT OF VALUES, PHILOSOPHIES AND STANDARDS

by RYON ROBINS

Most of what you're going to be exposed to in our community is probably going to contradict most of the "conventional wisdom" you've ever heard about the business of building an **OUTSTANDING** law firm. So it's important that you have a proper context in which to consider the work we are going to do together. Because if you follow conventional wisdom you're only going to produce conventional results. And neither of us wants that for you!

A large, stylized handwritten signature in black ink, likely belonging to Ryon Robins, is positioned at the bottom of the page. The signature is fluid and cursive, with a prominent initial 'R'.

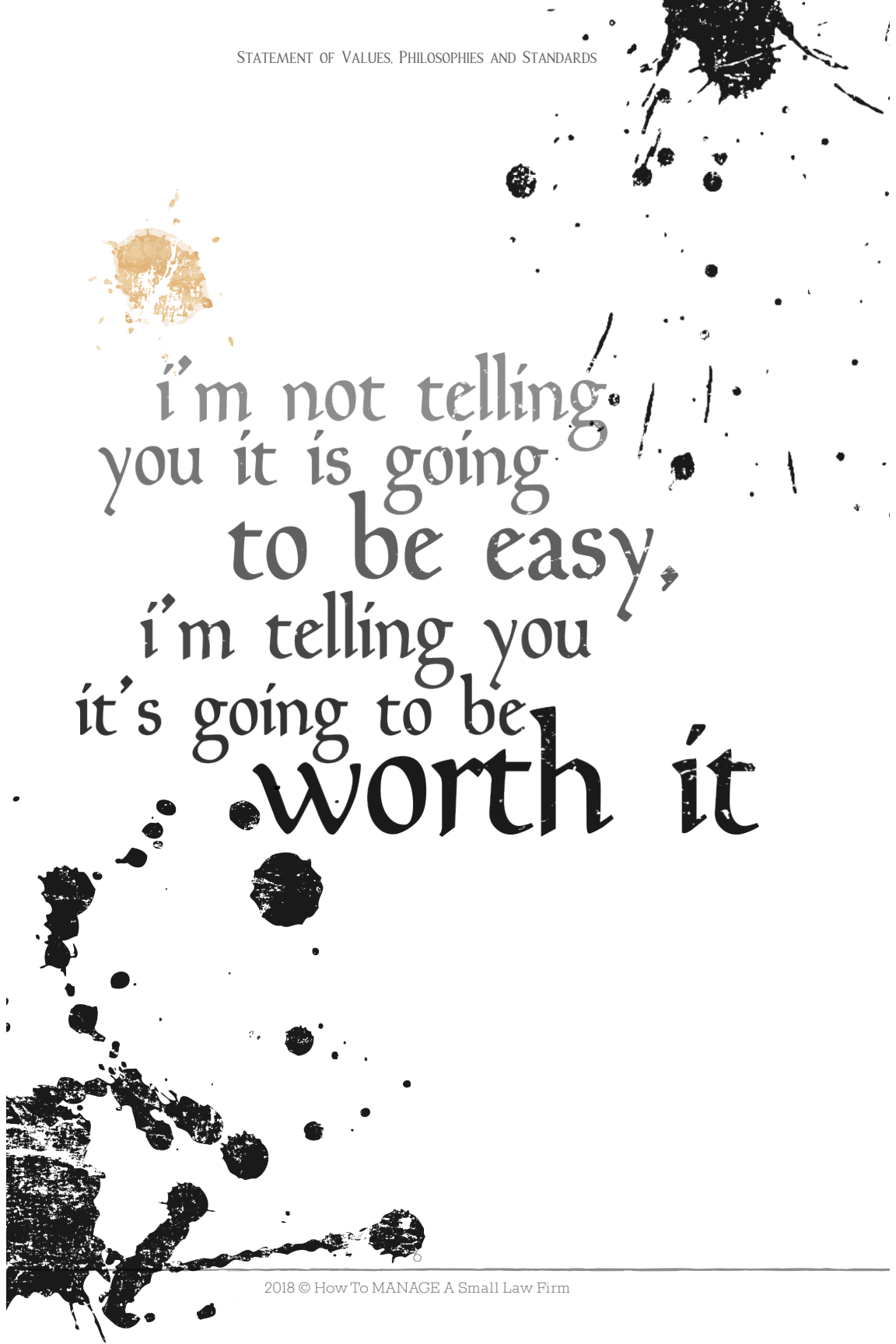


Table of Contents

I. Statement of Philosophy	5
No Apologies	10
No Excuses	15
No Regrets	19
II. Plants, Animals, And Lawyers	25
III. Firm Policies	41
Firm Policy #1: NO ASSHOLEs	43
Firm Policy #2: Definition Of The Word "Emergency"	46
Firm Policy #3: Payment	47
Firm Policy #4: hiding Out	48
IV. Program Overview	51
The Big Picture	56
Stage 1: Creating A Successful Law Practice	57
Stage 2: Upgrading Law Practice -> Law Business..	59
Stage 3: Breaking 7 Figure Barrier	61
Stage 4: IC00	63
Stage 5: ICFO	65
Stage 6: ICeO	67
The Road Ahead	69
Your Upcoming Discovery Day	69
The Live Quarterly Meeting	70
Your Membership Site	70
"The Dashboard"	71
12-Week Crash Course	72
CEO Service	73
COO Service	74
CFO Service	76
FINAL NOTE	77

I.

STATEMENT OF PHILOSOPHY

The background of the page is white, decorated with various ink splatters. In the top right corner, there are several black splatters of varying sizes. In the top left, there is a larger, textured orange splatter. The bottom left corner features a large, dark, irregular black ink blot. Scattered throughout the page are numerous smaller black dots and fine lines, giving it a hand-drawn or artistic feel.

i'm not telling
you it is going
to be easy,
i'm telling you
it's going to be
worth it

I. STATEMENT OF PHILOSOPHY

How To MANAGE a Small Law Firm is a special place. It's a unique community of highly-entrepreneurial owners of solo and small law firms. To protect the important work we do and provide a safe place for all our like-minded-Members to discuss their business we have strict policies for the types of people we will and won't work with (see HTMSLF Company Policy #1). This means that everyone you meet either in our discussion forum or at any of our live meetings is probably someone with whom you're going to feel pretty comfortable discussing your challenges, celebrating your successes and just generally enjoying the camaraderie that comes from investing quality time with quality people who take pride in having a great business, that serves their life.

PROFIT and VALUE are NOT Bad Words here

The fundamental shift that takes a lawyer from struggling (or merely getting-by) to thriving is the understanding-of, and when they embrace the fact that their law firm is a business.

Running a business is amongst one of the highest callings of a human being. This is because the purpose of a business is to produce profit. And profit is what has lifted the human race from the mere existence of the cave-dweller to the rich life of abundance which is available to any person who would make use of the resources of modern society.

Because whatever may be said in praise of poverty, the fact remains that it is not possible to live a really complete or successful life unless one makes use of resources. No one can rise to his or

her greatest possible height in talent or soul development unless they have plenty of resources, for to unfold the soul and to develop talent we must have many things to use. And modern society is presently organized such that the only practical way for one person to gain access to all the resources necessary for a full and complete life is to enter into voluntary exchange with others.

NO APOLOGIES | NO EXCUSES | NO REGRETS

"SUCCESS REQUIRES
NO APOLOGIES
FAILURE PERMITS
NO ALIBIS"

Think and Grow Rich
Chapter Two

NO APOLOGIES

It is our belief that maximizing the profits of a small law firm is a GOOD thing. Many people mistakenly believe that profit is only achieved through the cheating of others, so they make profit a dirty word. Many lawyers even apologize for making a profit. But those lawyers misunderstand the nature of profit. Profit is nothing more (and nothing less) than a voluntary exchange of something a person values less for something they value more.

For example, if I am in need of a new car, I am willing to exchange \$XX,XXX dollars to get the car. I value the car... Or said another way, the car will bring me more happiness than the money.

The auto dealer has a car that he wants to exchange for \$XX,XXX. He values the money more than the car.

So, in this case, if my happiness (profit) is great enough, and if the dealers happiness (profit) is great enough than we will make an exchange that profits **BOTH OF US**, otherwise, no exchange will be made.

Think about yourself. A client comes to you with a problem. The solution to this problem will bring them happiness. Or in some cases the knowledge that they made an effort to solve their problem will bring them happiness.

They value the solution to their problem more than their money. So they are willing to part with their money in order to make an effort to solve their problem (so they can be happy). For some clients they value their self- respect more than their money.

You have the ability to help the client solve their problem which makes them more happy than not making an effort to solve their problem.

You are willing to exchange your resources (time, expertise, systems you have developed, staff, etc.) for their money because you value the money more than these resources.

The truth is, you and me, and just about everyone else on the planet are constantly seeking happiness. Think about it, isn't that why you are here now?

You made a decision that the programs we offer can bring you more happiness. And you have decided that you are willing to **EXCHANGE** some of your resources (time and money) in order to discover how to better manage and profit from your law firm, so that you can have a happier life.

Revenue is a measure of how much value a small law firm delivers to its clients, which is a good thing for your clients. Profit is a function of how efficiently the firm delivers that value, which is a good thing for you.

Simply put, the more people your law firm serves, the more revenue your firm will earn. The more efficiently your firm delivers those services, the more profits you'll enjoy as your reward. The point to keep in mind is that your profits don't come at the "expense" of your clients but as a by-product of helping them.

It's important that I give you some of the fundamentals of profit as we see it:

1. *You and me and just about everyone else on the planet is seeking happiness.*
2. *Happiness is a state of consciousness which proceeds from the pursuit of one's values, not the mere absence of pain.*
3. *Profit is the increase in happiness that comes from replacing one situation with a preferred situation.*
4. *Therefore, all emotionally healthy individuals seek profit of one kind or another.*
5. *In a business transaction you have to offer your client profit; that is you must offer your client the opportunity to exchange something he wants less (money), for something he wants more (a solution).*
6. *The essential nature of profit is **INCREASE**... one value is given up in exchange for a greater value.*
7. *Both parties must profit or no voluntary exchange can be made.*
8. *Profit is a just reward for efficiently satisfying the desire of someone else.*

So for us, ultimately, **profit is simply a by-product of a well managed law firm which delivers value to its clients in the most efficient manner possible.** The

AS A PRACTICAL MATTER -

WHY THE FOCUS ON FINANCIAL PROFIT?

- Financial profit is the fuel that drives your business. Without financial profits, your business won't grow.
- Without steadily increasing financial profits, you'll have to work harder tomorrow than you did today because of inflation.
- Without sufficient financial profit, you can't leverage your time and energy with appropriate staff, equipment, etc.
- Without financial profit, you can't pay yourself what you deserve.
- Profit gives you **OPTIONS** to pursue those areas of your life and your business that you enjoy the most.

more people your law firm serves, the more revenue your law firm should produce. The better you manage your law firm, the more profit you should earn.

At How to Manage a Small Law Firm we make NO apologies for the pursuit of profit.

“We can
EVADE REALITY
But we
cannot avoid
the consequences
of EVADING
REALITY.”

- Ayn Rand

NO EXCUSES

We believe that life rests on the foundation that all human beings have been given a gift... The power of choice. And each of us is free to create a life of our own design, based on how we apply our power of choice each day (or not). You are no exception.

What we have, where we go, what we do and who we are is the result of how we make use of this gift. You can unlock any life you can imagine. If you dare to choose a path of greatness, you will create a great and magnificent life for yourself to experience.

Leveraging up your own personal effectiveness by an order of magnitude is not a commonplace idea. But you are not a commonplace lawyer. Commonplace lawyers do not pick up books like this to read. So, you should not be surprised to hear that unconventional success calls for yet more unconventional approaches.

Right now, in this moment you are capable of exponential improvement in your performance. You can build a business which leverages your skills, magnifies your energies and delivers your best intentions unto the world. Learning how to practice law was only the first step in the journey to discover your full potential.

Take a moment to consider the thousands of hours you have likely invested already, learning how to be a better lawyer. Compare that total, against the relatively few hours you have likely been exposed to the practical realities of how to manage a small law firm.

With the power of choice you can multiply your personal

effectiveness and shatter your previous records of achievement.

You don't have to settle for things as they are now. That can all change. Dramatically. And quickly.

If you are ready, life is prepared to give you a breakthrough experience on an entirely different plane of existence.

The key to all of this is in your hand right now. But you must be the one to make use of the gift you have been given. And use the key that is in your hand right now. No-one can make this decision for you. No-one can use your key. It will only work for you. Just as everyone else's key will only work for them.

Do you want to know what it is?

The key to all of it is
RESPONSIBILITY.

Excuses are the drug which numbs the pain and provides temporary relief. But then tomorrow the problem which caused the pain in the first place will still be there. Responsibility is the cure. It's what forces us to take action to avoid the causes of pain when we can, and take action to eliminate those causes when we must. Responsibility is akin to reality. Excuses are a form of self-delusion.

YOUR KIDS DON'T GIVE
A SHIT ABOUT YOUR
EXCUSES. THEY JUST
WANT YOU TO BE THERE,
TO CHEER THEM ON.
- RJON ROBINS

But sadly for them, many countless great practitioners are content to get-by on a diet of feel-good excuses served-up at the kiddie table. Instead you can pull-up a chair with the grown-ups

and feast on personal responsibility.

Excuses about why your law firm lacks the resources it needs (time, money, connections, etc.) to solve more problems for more clients and make a meaningful impact on the world matter not.

At the end of the day, all you're left with is a law firm (and a life) that lacks the resources needed to solve more problems for more people and make your mark on the world.

The only thing that matters is what you do.

At How to Manage a Small Law Firm **WE DON'T MAKE EXCUSES**. We don't accept excuses. We believe in your unlimited potential and we will always insist that you take actions which are consistent with that potential.



THE THINGS YOU
REFUSE TO MEET TODAY
ALWAYS
COME BACK
AT YOU LATER ON,
USUALLY UNDER CIRCUMSTANCES
WHICH MAKE THE
DECISION TWICE
AS DIFFICULT
AS IT ORIGINALLY WAS

- Eleanor Roosevelt

NO REGRETS

I went to the woods because I wished to live deliberately, to front only the essential facts of life, and see if I could not learn what it had to teach, and not, when I came to die, discover that I had not lived.

Henry David Thoreau, Why I Went Into The Woods

Like many lawyers, perhaps most, I grew-up with the mantra

“Failure Is Not An Option”. On the one hand, I think that’s a great lesson to teach a young professional. It instills the notion that we must fully commit ourselves to the task at hand. That we should not give any effort less than our 100% commitment. This mantra can foster the kind of “can-do” culture in a law firm that helps the team pull-together and find a solution against all odds.

But as I have grown with experience, and had the opportunity to help countless lawyers create, upgrade and break through the 7 figure barrier I have learned there is a dangerous “side-effect” to the “Failure Is Not An Option” mantra.

In fact, as the number of million and multi-million dollar solo lawyers I count as friends continues to grow, I have discovered that for most of us who have joined The Million Dollar Solo Lawyers’ Club, failure wasn’t just an option; it was an invaluable teacher and even an important friend who helped us on our journey.

You see, failure isn’t really what anyone fears or suffers from. Private failures carry no stigma at all, except for the ways we punish ourselves when we fail. Instead what we all suffer from is

fear of what others will think of us, if we try something and fail. It's not the failure itself that stops us from trying to live up to our potential, it's what we fear the consequences of the failure might be that keeps us from even getting in the game.

One day I was listening to a talk with James Cameron, the producer of Titanic and some of the world's other highest-grossing films of all time. He articulated for the first time, exactly what I'd discovered and discussed with at least a hundred other million dollar solo lawyers and millionaire friends.

He said **"Failure must always be an option. Fear of failure should never be."** You see, because if failure is not an option, then good people hesitate to try and accomplish great things. So yes my friends, failure must always be an option.

Think about all of the real regrets you've had in your life. Which do you regret more, when you fell & skinned your knee or, that you wimped-out and never tried to make the leap? When the girl (or the guy) turned you down for the date? Or that you never met the stranger who caught your eye because you hesitated a moment too long and the doors to the train foreclosed your chance? The job you took a chance on, or the one you lacked the courage to go for?

The most profound regrets you (me and everyone else) will ever have in our lives will be for the failures we never risked experiencing because we feared to take a chance. Not a wild, crazy, un-calculated chance. That's just being stupid. But a smart and strategic chance with big up-side potential and limited real risk.

Sadly there are tens of thousands of brilliant lawyers who

right now at this very moment while you are beginning to unlock your fullest potential, knowing full-well that it “might not work”; they are playing it safe, so fearful of what others may think of them if it doesn’t work that instead, they’re clinging to a strategy that cannot work. Because more of the same is only ever going to get them more of the same.

At How To MANAGE a Small Law Firm, we believe that a life well lived is a life full of bumps & bruises but with NO regrets; Because “A ship in a harbor is safe. But that is not what ships are for”

-Anonymous (then adopted by my father, Alvin Robins).

Make **NO APOLOGIES** for your **successes**.

Make **NO EXCUSES** for your **failures**.

Live your **life** with **NO REGRETS**.

*That old wind that's whipping out there It's whistlin' your tune
That wind blew pyramids to Egypt
And footprints to the moon*

*And that old star that you been wishin' on is shinin' mighty bright
But it's the fire inside your heart that's gonna lead you to the light*

How you ever gonna know what it's like to be there

How you ever gonna know victory

How you ever gonna know what it's like when dreams become reality

How you ever gonna know how it feels to hold her

How you ever gonna know what it's like to dance

How you ever gonna know if you never take a chance

*You know failure isn't failure If a lesson from it's learned
I guess love would not be love Without a risk of being burned*

*Anything in life worth havin' Lord, it has its sacrifice
But the gift that you're receiving Is worth more than a price*

How you ever gonna know what it's like to live there

How you ever gonna know what you never knew

*How you ever gonna know if you're down here doin' what the good Lord put
you here to do*

How you ever gonna know if you could have done it

How you ever gonna know how it feels to fly

How you ever gonna know if you never dare to try

*Listen not to the critics
Who put their own dreams on the shelf If you want to get the truth to admit it
You gotta find out for yourself*

How you ever gonna know what it's like to be there

How you ever gonna know if you're the best

How you ever gonna know what you believe in if you don't put it to the test

How you ever gonna know how it feels to hold him

How you ever gonna know what livin' means

*How you ever gonna know if you
never chase the dreams*

How you ever gonna know your potential

How you ever gonna know victory

How you ever gonna know what it's like when dreams become reality

How you ever gonna know how it feels to hold her

How you ever gonna know what it's like to dance

How you ever gonna know if you never take a chance

- Garth Brooks

Success is
a lifestyle

What matters
more in
the long-run and
in the short-run
than have.

II.

PLANTS, ANIMALS AND LAWYERS

II. PLANTS, ANIMALS AND LAWYERS

HAPPINESS & CASH FLOW vs. THE ETHICAL PRACTICE OF LAW

A plant has no choice of action; the goals it pursues to survive are an automatic function of its genetic makeup. A plant may employ different strategies to overcome the conditions it encounters, but there is no alternative in a plant's function: it acts automatically without thinking, always to further and protect its own life.

A plant cannot act consciously for or against its own suffering or destruction.

Animals have a higher level of consciousness and therefore have to master a wider range of actions and understandings for survival. This "survival instinct" is hard-wired into the brains of animals, but they have no choice in the knowledge and skills they acquire. Animals have no power to extend their own knowledge. Or to evade it.

Therefore, in situations for which an animal's knowledge or understanding is inadequate, the animal suffers or dies.

As human beings our survival and happiness are not dictated or limited by genetics or environment. Our minds, not our senses tell us what is good for us vs. what will cause suffering and pain.

We are the highest living species on earth with limitless capacity for gaining knowledge and to appreciate all the enjoyment

that knowledge can bring. But there is a catch. Our minds and our conduct are volitional. There is no guarantee of happiness or even survival. We have to make a conscious choice to learn and we must take actions that are consistent with our goals and values.

The legal profession itself is actually an outgrowth of this fact of human nature. Plants and animals do not have the same free will we do, and so they have no use for laws except the unbending laws of nature known to all.

But the minute two people get together and agree on a code of conduct for their mutual betterment the opportunity for conflict and misunderstandings arise. Hence the need for lawyers to protect society, by helping people avoid, unravel and deal with the inevitable misunderstandings in a civilized way.

Without laws and a reliable mechanism to enforce them our economy would grind to a halt. Evidence of this is found in every third world country and “banana republic” where the only way for a person to protect his or her rights is at the end of a gun.

And when that happens, no-unarmed person is safe to enter into contract with anyone else, which places an enormous “protection” tax on every transaction.

**So What Does Any Of This
Have To Do With Running A MORE Profitable
STRESS-FREE Law Firm So I Can BE happy?**

Running a successful solo law firm requires you to make conscious decisions about the types of clients you will accept, the kinds of cases you will take responsibility for, the management techniques you will employ to manage workload, ensure fiscal soundness and control client expectations to protect yourself and

your staff.

This cannot be accomplished by just going through the motions like a trained animal. Nor is your success and happiness likely to be achieved by random chance, like a plant waiting for it to rain.

As the owner of your own small law firm you are of-course free to evade the realities of what it takes to have a profitable and professional law firm. But you are not free to escape the consequences of ignoring those realities.

But, “hAPPY” Gets A Bad Rap...

Tell most other lawyers in your market that the only reason you went to work today is to be HAPPY, and they will look at you like you are crazy.

And that’s a sad thing. . . For them!

You see, we believe that for a rational person, happiness is not about a momentary pleasant sensation, with no regard for long-term consequences. Instead, in our experience happiness comes from the pursuit and achievement of our goals, rooted in our core values.

So the successful lawyer is happy to go to work because he or she learns how to find the connection between the work itself and his or her core values.

That’s why one lawyer who goes into a given practice area ‘just to make a buck’ will never earn as much as the other lawyer who goes into the same practice area because there is some aspect of the work that feeds his or her values.

That's also why the second lawyer stands a much better chance of being happy. . . And why his or her happiness will too-often be misinterpreted by the first, as being the result of making a lot of money.

In fact, the opposite is actually true.

But try telling that to an unhappy lawyer who is too busy worrying about where the next case is going to come from; and half-hoping it never does because the business is already far-enough out-of-control without any more work for them to do!

They Just DON'T Get It

Most lawyers have never learned the skills required to make a law firm run like a business so it serves their needs. Nor how to make it rain to attract the kinds of clients they want to be working for, and do the kind of work that serves their core values.

So all this talk about your law firm making a lot of money as a consequence of your law firm making you happy... It all seems like a bunch of baloney. As if there's some kind of magic formula, reserved for only the chosen few.

But it's not magic.

And it's not even that hard to do.

Really, any 'normal' lawyer and in just about any practice area can build a million dollar practice in about 36 months (or less). And, if anyone had bothered to teach you the skills, you would have been able to do it too. Maybe you already have!

“WORK HARDER
ON YOURSELF
THAN YOU DO
ON YOUR JOB.”

- Jim Rohn

Here's What I Mean...

HAPPINESS & CASH FLOW vs. THE ETHICAL PRACTICE OF LAW

It surprises many of the lawyers I have worked with over the years, when I tell them that being a solo practitioner, or in a small firm with five or fewer attorneys, we are actually in the vast majority of lawyers in this country.

You see, most law schools get their largest endowments from big law firms. So they prepare law students for how to be cogs in the big law firm machine. Not how to be owners of their own successful small law firm businesses.

Part of that preparation is a sometimes-subtle message that you're supposed to graduate from law school and "pay your dues".

Because that's what the managing partners of most big law firms want their cogs to do.

Now, for the lawyers who made an informed-choice to sacrifice ten or more years of their lives in hopes of finally getting a chance at the controls of the machine, that's probably pretty good advice.

But What About The Rest Of Us?

As a Practice Management Advisor, first with The Florida Bar's Law Office Management Assistance Service (LOMAS), then as head of the leading management advisory & coaching firms dedicated exclusively to the unique needs of the single-shareholder solo/small law firm; I've had the unique opportunity to work with thousands of lawyers from small firms, to help them with virtually

every aspect of marketing and managing their law firm businesses.

And what I discovered over, and over, and over again is that yes, in fact, most lawyers DO have a big hole in our education when it comes to the practical realities of law firm marketing and management.

But the bigger problem, I eventually realized, which prevented so many otherwise-capable and intelligent lawyers from taking the tools I gave them and using those tools to make big improvements in terms of revenues and personal and professional satisfaction... Was that they were not-yet ready to believe that they **DESERVED** to be happy.

Somehow a "Doctrine of Sacrifice" has snuck its way into the culture of the legal industry. And it has lawyers believing that sacrificing your happiness is an inherent and noble part of "serving" clients.

This way of thinking turns you into the servant and clients into your masters - and adds insult to the injury by saying you should find happiness in the sacrifice.

Instead, Happiness is the state of consciousness which proceeds from the pursuit of one's values, not the mere absence of pain due to a short-term- bump in cash-flow, or a single day of victory in court on behalf of someone else's cause.

Sadly for them, most lawyers are not-yet-ready to let-go of this old familiar pain. Notwithstanding the fact that it leads to too many days spent worrying about cash flow, too many hours of self-sacrifice in the office, and service to clients and on cases that those lawyers don't have any passion for. With the right law

firm marketing and management skills, you don't have to choose between happiness, cash flow, or the ethical practice of law you really can have all three.

Are You Ready?

If you are ready to break-away from the pack, and do things a little differently than other lawyers in your market, then you have found a safe place for our kind. . .

PEOPLE WHO ARE INTERESTED DO WHAT IS CONVENIENT.
PEOPLE WHO ARE COMMITTED DO WHATEVER IT TAKES.

- David Neagle

What's Next?

I need to tell you that not everyone loves our community. Not everyone is ready to take responsibility for making the kinds of decisions and sort of actions required to have a profitable and professional small law firm that makes you happy.

Once, an angry lawyer approached me after sitting through one of the CLE workshops we did during The National Solo & Small Law Firm Success CLE Tour that was sponsored by Microsoft & LexisNexis in 2011. He was upset and complained that I would not tell him: What kind of client to avoid; how much money he should make; and he was disappointed I didn't have a magic pill to give him to make his life better.

He basically tried to shift his personal responsibility for thinking and acting for himself, over onto me.

We will teach you skills, give you tools and explain techniques that thousands of very successful lawyers are using all over the world today to manage

DO, or DO NOT.
There is no try.

- YODA

client expectations, reduce stress, improve client service and make more money with their solo and/or small law firm. Many of these same lawyers have experienced increased repeat business, referrals and profits in their law firms after applying some of the lessons you'll be exposed to in our programs.

But at the end of the day, life is a “do-it-yourself” project. And only you can decide what kind of clients make you happy, and what kind of life you want to live.

So we refunded that lawyer his entrance fee. And if for any reason during your Discovery Day with us, you don't feel our program is right for you, we'll refund your Discovery Day/set-up fee too.

Now, you may be wondering why I would tell you a story like this when I'm obviously hoping you are getting really excited about this program?

These Three Answers May Surprise You:

First, I want you to know up-front, some of the things our programs will NOT do for you.

And while we're on the subject, let me go ahead and make this point perfectly clear:

None of our programs will do anything FOR you.

Our programs will explain the concepts and techniques that thousands of lawyers in small law firms, with dozens of different practice areas have used very successfully to make more money, have a more successful law firm and most importantly a happier life (you've seen their testimonials on our website).

We will expose you to skills and tools that many lawyers credit for a lot of valuable repeat business, more cheerful and profitable staff, and better financial controls with more predictability. And we will provide plenty of guidance, support, advice and answer as many questions as you have.

But none of this did anything FOR any of the lawyers who have shared those wonderful testimonials and thank you letters, videos, etc.

They each had to take **action** and apply the knowledge in their law firm and in their life. And I would not deny them their dignity by presuming to say we did any of this "for" them. They earned their right not to make any apologies for the success they enjoy. This is one of the joys of being an adult human being and not a houseplant.

“To know and not to do, is not to know.”

- Bruce Lee

Second, this program is not a substitute for mental health counseling. If you need someone to explain WHY you deserve the chance to be happy with your career and your life, I would ask you to please contact us right away and request a refund.

Third, I have a certain type of client I prefer to work with... All others are asked to leave.

You will see, after you complete your Discovery Day and decide you want “in” you’re going to have a lot of access to me. I don’t put a lot of barriers between myself and everyone in our community. And since one of the things I’ll teach you is the value of taking a pass if there isn’t a good fit with your services and a prospective clients’ wants or needs, I walk-the-walk myself too.

So, if you’re not-yet comfortable with the notion that as a lawyer you should be doing everything you can to make your law firm into a business that makes you happy and creates maximum profit and value for you and your family, please contact our office at **888-765-7460** so we process your refund right away.

In closing, I hope I have demonstrated my commitment to you, your profit (happiness), and your growth. I will work very hard to deliver my part of this deal, and the rest will be up to you. Just so you know, I’m really not interested in just having a single transaction with you. Instead I’m focused on how we can profit together for years to come. Because the more we help you grow your law firm and have a better life, the more you will help us grow our business and have a better life.

III.

FIRM POLICIES

Would you
ever hire a
law firm if
you knew the
owner had no
business plan, no
budget + no real idea
how the firm will
still be in
business next year?

Firm Policy #1: NO ASSHOLES

Yes, you read that right... We have a “Grading Scale” we use to define an “A” client/member. These are the sort of people we love to work with. The sort of people who inspire me and my team to go above & beyond on a regular basis.

We also have our idea of what’s an “F” client/member. These are the sort of people that the “A” clients/members don’t want to be around and neither do we!

There are two approaches to creating your own “Grading Scale”. One is to build-up from F to A.

The other is to define what’s an “A” and then as you remove certain positive qualities, characteristics and behaviors you likewise “demote” a person until their conduct lands them on suspension and then eventually out of business with you. We enforce this policy to protect you and me both!

So here’s what it means to be an “A” client/Member in my business (in no particular order):

- ☛ We like working with the Member
- ☛ The Member likes working with us.
- ☛ The Member is highly-motivated to have a successful law firm & all the benefits that flow from it.
- ☛ The Member has tangible and objectively quantifiable goals that excite him/her.

- The Member respects my staff and appreciates them for the very challenging work that they do servicing and keeping hundreds of lawyers happy from all around the world.
- The Member responds to the mistakes that we make in our business with the same grace and maturity the Member would expect his/her own clients to demonstrate when the Member's own law firm makes a mistake.
- The Member believes that the best investment s/he can make is an investment in him/herself.
- The Member cooperates and supports our policies.
- The Member is collaborative and intellectually generous with the Group.
- Good sense of humor and not easily offended by liberal use of the "F" word especially when it's so richly called for in an explanation!
- The Member thinks it's cool that my dog often works from my office with me and that I often work from remote and sometimes exotic places, so there may be the occasional odd sound in the background.
- The Member does the work required to translate the lessons, tools, insights, ideas, templates and instructions we provide into tangible results.
- The Member is honest with us and him/herself.

- ❖ The Member remains current on their financial obligations to us and otherwise follows the rules we have established and which are designed to help all of our Members get the best results possible.
- ❖ The Member looks for lessons not problems. There's always a lesson. Sometimes we make it obvious. Sometimes you get to find it for yourself.
- ❖ Positive, prosperity-based outlook on life - no whiners or crybabies allowed!
- ❖ The Member is fair, reasonable and rational treating others in a way that is consistent with the way he or she would like to be treated which includes making hiring and retention decisions based on merit, not based on race, creed, color, gender, age, physical ability, national origin, religion or sexual orientation.

Assholes are people whose conduct is the opposite of the positive attributes described above, that we look for in people who we choose to do business with as Members, vendors or as part of our Team.

Firm Policy #2: Definition Of The Word “Emergency”

Depending on which program you are enrolled in you may enjoy more or less access to certain members of my team. But in all cases, we consider it to be an “Emergency” and you can be sure someone on my team will drop whatever he or she is doing to respond to you as soon as humanly possible if:

Office Casualty – We consider it an emergency if your office has been damaged and you need to find emergency office space from which to continue to run your business. Examples are fire, flood, earthquake robbery, etc.

Embezzlement – We consider it an emergency if you find evidence or even strongly-suspect anyone associated with your law firm has embezzled (or is embezzling) from your business.

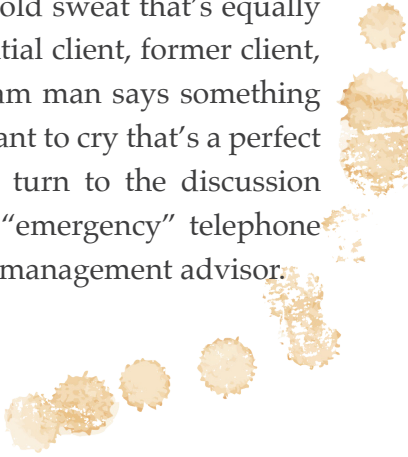
Missed Deadlines – We consider it an emergency if you discover your firm has missed a critical deadline like a statute of limitations and so you are totally freaking-out and need to speak with someone who understands how a law firm operates, the significance of a missed deadline and who is NOT going to let you make an already bad situation worse by crawling down into the problems and freaking-out with you.

Emergency Termination – If you have cause to conduct an emergency termination of an employee, we consider that to be an emergency too. For example violence in the workplace, fraud or embezzlement, grossly inappropriate behavior, like a paralegal driving her car drunk through the front of your office – true story!

Physical Emergency – Hopefully, long before you experience a physical emergency which renders you unable to run your law firm you will have studied and implemented some of the

“Disaster Preparedness” policies & procedures which you can find in the Library of the Membership site. Regardless, if you yourself or someone close to you has an accident that renders you unable to give your business the care & attention required, we definitely consider that to be an emergency. Obviously if it’s YOU who is under the bus you will not be able to call us for help. So be sure your spouse, significant-other, your coverage attorney or someone you trust has our emergency contact information. And let them know that if anything should ever befall you, they should call us and let us know the time has come for us to ride to the rescue.

Things That Are NOT An Emergency – If you fail to send out bills for several months and then run into an urgent cash crunch, that’s a learning opportunity for you not an emergency for us. If you neglect to analyze your financial statements and then wake up in the middle of the night in a cold sweat that’s equally not an emergency for us. If a client, potential client, former client, a referral source, a vendor or the ice cream man says something that hurts your feelings and makes you want to cry that’s a perfect example of when you should definitely turn to the discussion forum for support and not schedule an “emergency” telephone appointment with your assigned practice management advisor.



Firm Policy #3: Payment

We must model the same responsible behavior we are going to coach, advise, teach, encourage and hold you accountable for in your own business. Accordingly, we must insist that you remain current on all of your financial obligations to us. If you run into a problem please let us know as soon as possible and we will consider offering an accommodation on a case- by-case basis. (Note: This is an example of how it pays to be an “A” client!)

Firm Policy #4: Hiding Out

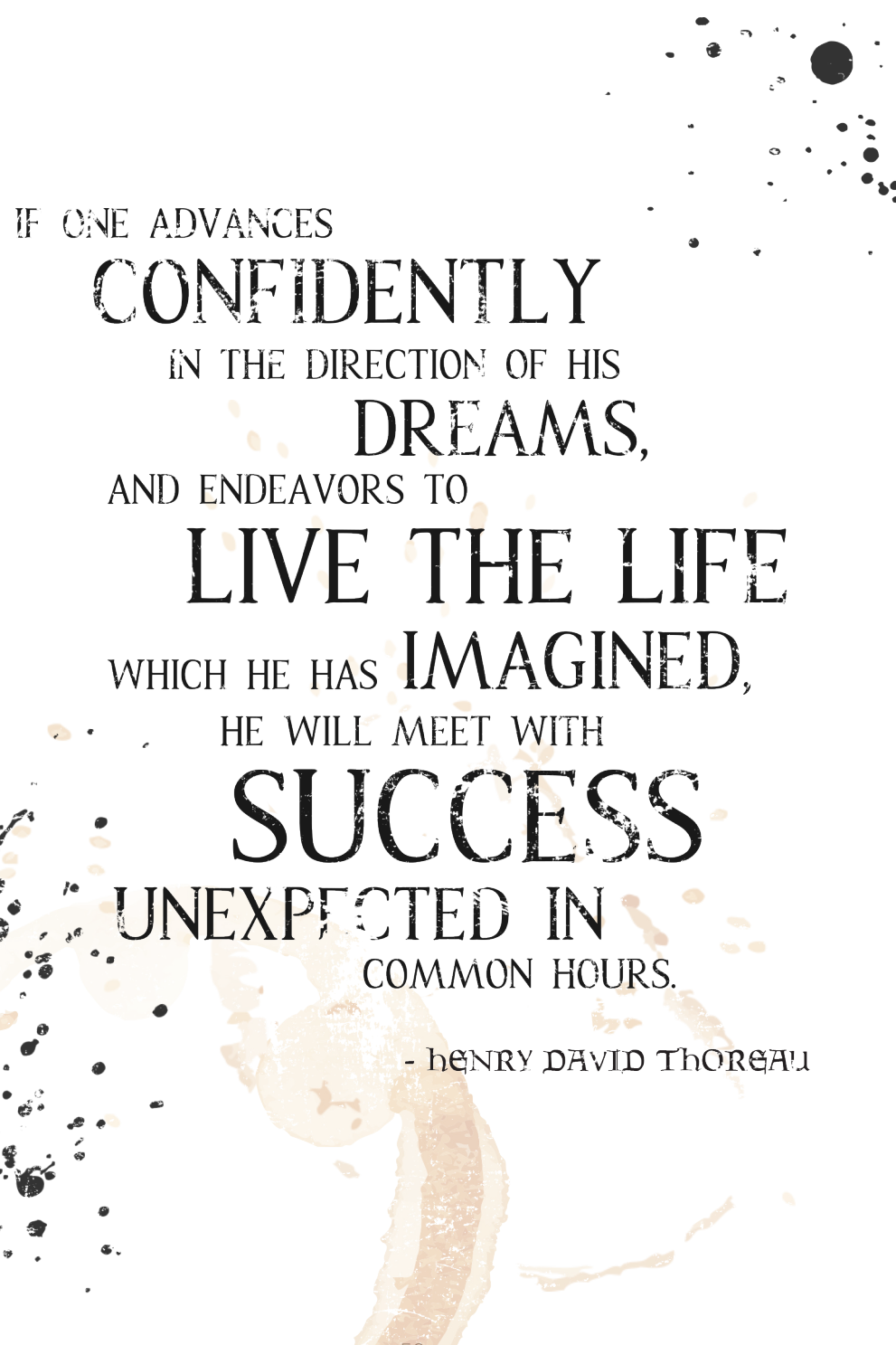
A true friend does not quit on you and neither will we. It is our policy therefore to hold you accountable even if at times you really, really, really hate us for it. Even if you tell us to go away.

Our job is to help you be the very best owner you can be with the very best law firm you can create for yourself. But at the end of the day, life IS a do it yourself job. So there will be no hiding out.

We will always be 100% honest with you. We will tell you if you have something stuck in your teeth, we will tell you if you're letting yourself and your family down and we will never let you sell yourself short, even when a nice comfy "excuse" might make you feel better.

It is our policy therefore to be very "gung-ho" about your future and never let you cop-out on yourself or forget your potential. I promise you're not going to make it past the interview process and get accepted into any of our programs unless we believe in you!

I am a
Product of
The Product.



IF ONE ADVANCES
CONFIDENTLY
IN THE DIRECTION OF HIS
DREAMS,
AND ENDEAVORS TO
LIVE THE LIFE
WHICH HE HAS **IMAGINED,**
HE WILL MEET WITH
SUCCESS
UNEXPECTED IN
COMMON HOURS.

- HENRY DAVID THOREAU

IV.

PROGRAM OVERVIEW

IV. PROGRAM OVERVIEW

Depending on various criteria, including: Where you are today; Where you want to be in the future; and How quickly you are determined to achieve your goals, we may have made a preliminary recommendation as to which of our several different programs is the best place for you to begin. Soon, at your Discovery Day meeting when we will have the opportunity to meet in person, together, we'll make a final decision about that recommendation.

At How to Manage a Small Law Firm we offer six levels of programs. Each of the six programs is designed to help a lawyer through the unique challenges that are typical of the six different stages of growth for a small law firm. Because along the way most lawyers can expect to encounter four very different types of challenges (and opportunities) in growing a law firm.

Also, we offer certain “a la carte” services to help you if you find your law firm has one “foot” in one stage of growth and the other at the next level, up or down.

Remember, the goal of all of our programs and services is to help you create and maintain a law firm that satisfies your unique and individual **personal**, **financial** and **professional** objectives. Nothing here is designed to be a “cookie cutter” solution. Because you are not a cookie cutter person.

Lastly, please keep in mind that we describe the predictable growth stages of a small law firm as a series of “steps”. In most instances the analogy is accurate. However, if you feel like your own experience is more analogous to an escalator, a ladder or an express elevator, that’s ok too. It is not our intention to pressure anyone into feeling their law firm must progress from one stage to

the next at a prescribed pace. In fact, you may even reach a certain stage of growth and decide you like it there. We won't pressure you to grow your law firm faster or bigger or more profitable than you have a compelling reason for it to be in your life.

"THE BIG PICTURE"

The six predictable stages of growth are as follows:

CREATING

CREATING A SUCCESSFUL LAW PRACTICE

UPGRADING

LAW PRACTICE → LAW BUSINESS

BREAKING

7 FIGURE BARRIER

ICOO

\$1.5-\$3MM

ICFO

\$3-\$5MM

ICEO

\$5-10MM+

CREATING

CREATING A SUCCESSFUL LAW PRACTICE

STAGE 1:

Creating A Successful Law Practice (\$0-250,000)

Emphasis at this stage is on creating a law practice that satisfies your short-term financial needs (figure 18-24 months). Additionally, the practice should operate with adequate-enough policies, processes, systems & procedures to enable you to stop & breathe and have a life. And the practice should also be professionally rewarding with plenty of good work from good clients and with reasonable support from a combination of part-time or full time staff and tactical use of technology.

This program is likely to be appropriate if you're just getting started (obviously) but it's also likely to be appropriate for you if you've been at it for awhile and "for some reason" you just cannot get your law firm to achieve at least \$250,000 of predictable gross revenues without ruining your life in the process.

Remember, causes lead to effects not the other way around. A law firm that grosses less than \$250,000 in revenues is an effect. A law firm that grosses \$250,000 or more, but is entirely based on how much you "sweat" with little or no leverage or predictability is an effect. The most likely cause of which is that somewhere along the way you probably missed a step or inadvertently built-in one or more of the six most common, costly, frustrating, embarrassing and expensive mistakes most lawyers make when creating a law

firm. So even if you've been at it awhile but your law practice has not yet reached the \$250,000 milestone, please keep an open- mind and plan to profit by using this program to identify and correct the likely problems in your firm's infrastructure that may be holding you back.

While your longer-term goal may be to achieve a level of sustainability and thereby upgrade from a "practice" to a business, so long as revenues are between \$0-250,000, our immediate objective must be to simply make the law firm more "successful".

Then, once your head is safely above water a whole new world of opportunities will come into view. And we'll be able to help you chart a course for upgrading from a law practice that requires you to be there so you can enjoy the freedom that comes from a sustainable law firm business that isn't so dependent on your sweat.

The Goal Of This Program is to help you create a successful law practice that satisfies your financial, personal and professional needs.

UPGRADING

LAW PRACTICE → LAW BUSINESS

STAGE 2:

Upgrading To A Sustainable Law Firm Business (\$250-500,000)

At this stage the emphasis is on building the “factory” so that your marketing and sales abilities don’t swamp the firm. As difficult as it is to imagine for most lawyers whose practice is grossing **LESS THAN** about \$250,000, the marketing and selling of legal services is actually the easy (and fun) part once you approach this stage of growth.

Keep in mind, we evaluate sustainability by how long the owner of a law firm can step-away (with emergency access, of course) and when you return you find your law firm has kept going and growing even in your absence.

Imagine having adequate operational and administrative systems in place such that you could be away from your law firm for 30 consecutive days. And when you return the firm has more money in the operating account, more money in the IOLTA account, more names have been added to the conflict of interest database, and a steady-flow of legal services have been delivered by the firm to clients.

Then you’d have a real business someone may want to buy from you someday.

Or buy into as a real equity partner.

Or you may decide to simply buy the law firm business from yourself and enjoy your freedom!

The Goal Of This Program is to help you create a sustainable law firm business that empowers you to step-away from the day-to-day operations of the firm and have it continue serving your financial, personal and professional needs.

Have the
courage to
follow your
own good
advice!

BREAKING 7 FIGURE BARRIER

STAGE 3:

Breaking The 7 Figure Barrier (\$500-1,500,000)

Very often what's going to get you to about the half-a-million dollar milestone is also what's going to keep you stuck there too. Because a funny thing tends to happen when a lawyer reaches this level of gross income. Especially if it takes him or her too long to get there. All of a sudden they may wake up and realize they've stopped playing to win and now they're playing not to lose. So breaking the 7 figure barrier is very often about reinvention. And it can take a long time, or it can happen surprisingly quickly if the owner of the law firm is willing to change.

Because once you build a proper "factory" for getting the work done without you having to be in your office every-single-day, you will enjoy tremendous freedom. And it can be tempting to want to just hang-out there. Many lawyers choose not to take aim at the million-dollar mark. They're perfectly content to enjoy owning a highly-successful and predictably- sustainable law firm that affords them a great lifestyle, reliable cash flow and the opportunity to dive into some challenging legal work when they want to. And if that's you then we'll be perfectly happy to help you keep "upgrading" your law firm to keep it growing more & more independent of you.

But if you want to break the 7 figure barrier we're going to have to help you build a marketing and sales factory too. Because once you have a reliable factory in place to handle all the legal work, it's going to become very obvious to you where all the work has been hiding and just how quickly you can take your firm from \$500,000 to more than \$1mm if you want to.

Breaking the 7-figure barrier (without losing too much sleep along the way) typically also requires more sophisticated financial controls too. This helps you more quickly, and more objectively identify the key leverage points in your business and make more confident decisions.

The Goal Of This Program is to leverage the resources of the firm to help you create a reliable marketing and sales machine that propels the firm beyond one million dollars of annual gross revenue while still serving your personal and professional needs.



STAGE 4:

Insourcing your law firm's COO (\$1,500,000 - \$3,000,000)

At this stage of growth your firm is probably starting to take off and providing you with a comfortable lifestyle. This is great but you might still feel like at any moment you'll lose the success you've worked so hard to build, or simply stay stagnant in growth because it's hard to imagine doing more than what you're doing now. No lawyer should feel this way, and we're here to help you insource, hire, train, and manage your law firm's COO.

Insourcing your firm's COO will give you FREEDOM. The freedom to do more of the things you want to do, and move on to something bigger if that is the case. Because you're an entrepreneur. And so you're always ready for the next challenge!

Your COO will help run your law firm's operations according to the business plan you continue to develop and pivot for success. This key member of your staff should be managing your team, ensuring policies and procedures are followed, alerting you of red flags in the business, and most importantly, will be managing to your expectations. But, if you've hired us it's probably because you have never managed a professional COO before and are getting help.

Our professional team will help you manage a qualified COO that will propel your business forward – not just a glorified office manager that will be good at doing whatever you ask of them. You'll find that once you have a COO in place which we help manage, your firm will give you peace of mind, your staff will be happier, and work will be getting done better than it did before!

With our help, your COO will make a big difference in getting from \$1,500,000 in revenue to over \$3,000,000. You should be ready to let your curiosity about your own potential and your desire to be passionate about your life and work, overcome your fear of change. Because what you're about to experience with the freedom of having a professionally managed COO, will change your life.

The Goal Of This Program is to empower owners of 7-figure law firms with more freedom and control of their businesses, by helping them insource their firm's COO, and keep them on track to doubling their business in the next 18 months.



ICFO



\$3-\$5MM

STAGE 5:

Insourcing your law firm's CFO (\$3,000,000 - \$5,000,000)

Law firms at this stage of growth must have strong financial controls, and more importantly, a good CFO that will leverage the resources needed to double to a \$6 million dollar firm in 18 months. That won't happen overnight, and it won't happen with a bookkeeper or accountant who isn't as hyper focused on growth as you are.

More often than not, solo lawyers in this group have been working with financial strategies that aren't necessarily focused on growth, but instead are focused on saving money. We're not saying there's something wrong with saving money, but if saving money is the strategy you're using to double your law firm's revenues – it's not going to work. No lawyer in this stage is going to get to the next stage of growth by saving more money. You're going to get to the next level of growth by dialing up on your marketing, hiring exceptional talent, expanding your law firm, investing in software to streamline processes, etc. All of which cost money!!!

By insourcing your firm's CFO and letting us handle the management and development of this person, you'll have an A-Team player that will help you plan for growth. You need to have

this person on your staff full-time so that they fully understand your business plan and where you are headed for growth. A fractional CFO (yes, even our service) is no longer the answer at this level, but you might not know how to manage them and communicate efficiently. Even more so, you might be very afraid of handing over all your numbers to someone who will be a complete stranger. That's why we're here to help.

The iCFO program provides you with a quality CFO that will be driven by growing your law firm by the numbers. Ultimately helping you build a more successful law firm, that is growing profitably and even more efficiently.

The Goal Of This Program is to have your law firm to employ a full-time CFO, which we will help train and manage, that will be growth orientated and take controls of your numbers.

ICEO

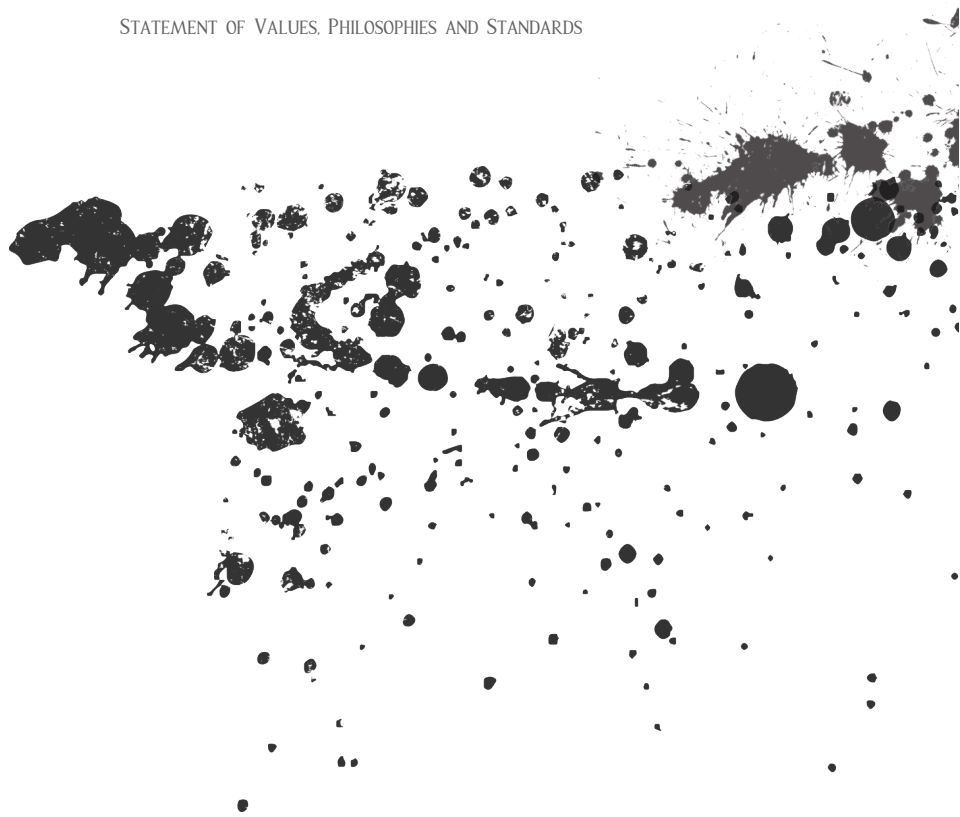
\$5-10MM+

STAGE 6:

Insourcing your law firm's CEO – or not (\$5,000,000+)

Solos at this stage have a decision to make: continue to be the lead lawyer for their firm's legal work, or transition into being the firm's full-time CEO. There is no right or wrong decision here, but either one will require help in transitioning trust.

If you are enthralled by the law and love working for clients and being in court, then you probably want to continue doing legal work in your law firm. That's great, but you'll need to hire a full-time CEO that will manage all other business functions, and work together with you on the firm's business plan and driving it forward. This isn't an easy thing to hand over, especially because you've worked hard to build your law firm to where it is and you want to continue to see it grow. But, a professionally managed CEO will continue to employ your management principles and build your firm according to your business plan.



THE ROAD AHEAD

NOTE: Please see enclosed welcome letter with details about Discovery Day Workshop, hotel, dress code, etc.

Your Upcoming Discovery Day

Very soon you'll have the unique opportunity to be surrounded by attorneys who are entrepreneurs, just like you. These aren't the solos you'll meet at Bar functions who take pride in the obscene number of hours they work every week. The solo lawyers you'll meet at our Discovery Day are challengers who are looking for a better way to run a small law firm – a way that meets their own personal, professional, and financial goals.

You'll also meet our highly trained team of professional CEOs, COOs, and CFOs who will be working with you to build your successful law firm. Everyone on our team has been highly vetted by our Executive team and Director of Programs, and most of our advisors have decades of experience in running law firms. Be at ease that the most vulnerable and intimate parts of your business will be in the hands of a professional who has seen it over and over again.

The Live Quarterly Meeting

Attending a Live Quarterly Meeting (LQM) will give you two full days of uninterrupted time to work ON your law firm, as opposed to in the firm. These meetings are one-part “family reunion” because about 80% of all of our Members will attend the meetings every quarter... And the other two-parts are filled with personal and professional growth, designed to give you the tools to grow your law firm.

At the LQM you’ll discover that our community is truly a safe place. You’ll see so many of our Members get up to the microphone and share a truly personal statement, in a room filled with hundreds of people. That’s because our Members support each other (and soon, you too) through the wins, losses, and everything in between that comes with being an entrepreneurial lawyer.

Your Membership Site

When you make the decision to join one of our programs, you’ll have access to our exclusive membership site. Which includes a library with hundreds of hours of law practice management lessons from our team, along with ready to go templates for you to implement in your law firm. You’ll also have access to our interactive forum, where our Members are always sharing the challenges they’re finding, how they’re overcoming them, and learning from each other. Our team is always monitoring the forum to share as many insights as we can with all of our Members.

“The Dashboard”

The HTM Dashboard has been custom built for small law firm owners to track their goals, revenues, and the firms progress towards the business plan. This is not case management software. What separates this dashboard apart from other software is that it tracks according to YOUR goals – not industry standards, or simply revenues. For example, if your goal is to make \$500,000/ year and work no more than 35 hours per week, you'll be able to input both of those numbers in the dashboard and see how you're tracking... You may discover that you're actually bringing in more money but killing yourself working far more hours than you intended. The Dashboard is an excellent tool to track you firm's capacity, revenue growth in any time interval, your marketing goals/ metrics, financial controls, and so much more.

12-Week Crash Course

Immediately after the Live Quarterly Meeting, you'll be enrolled in one of our 12-week crash courses. Depending on where your firm is today and how much revenue you're making, we'll assign you to the course that will provide you with the help your firm needs right now. The most common route for small law firm owners is one of the following two –

1. Annual Revenues below \$250,000: We help solos in this range focus on Marketing & Sales and building marketing systems that will bring in prospective new clients consistently. During the 12 weeks of the crash course we also focus diligently on creating a business plan according to your personal, professional, and financial goals.
2. Annual Revenues between \$250,000 - \$1,500,000: At this stage the focus is to build out all of the other systems in the law firm to get staff to work more efficiently, and over all create a more profitable business. The second focus on systems in this stage is making sure the firm can work without you being there day-in and day-out.

CEO Service

Once a week your assigned CEO will work with you (on a phone or Zoom call) to manage the law firm according to your business plan you designed to meet your own personal & professional goals. Your CEO will help create plans to achieve those goals, by helping the firm achieve its goals. We'll be working with you every week to be sure you're making progress, help you get un-stuck, hold you accountable, advise you and kick your butt when you need it.

As your CEO, we are a partner to you and your firm and that means we'll help other partners and associates in the firm make both a personal long-term strategic plan as well as make meaningful tactical progress each week. As your CEO we also help you re-evaluate your administrative and marketing/sales infrastructure. And we help you stop making the most common, costly, frustrating mistakes that most lawyers are making as they get further away from the initial implementation of these systems.

Part of your CEO service includes a Business Plan Workshop every 18 months, where we spend two days with you to define and develop the 7 Main Parts of your law firm and how they're going to work together to make a profit. Every law firm has the same 7 Parts – Marketing, Sales, Production, Physical Plant, People, Financial Controls, and You. Only a few variables will influence how these 7 Parts work... But they all exist no matter what practice area you may be in.

COO Service

Think about what a great COO does for a highly-successful law firm. They identify key processes, policies, systems & procedures that are present or lacking. They qualify the ones that are present and prioritize the ones that are missing. Then they set about the task of filling-in the gaps, shoring up the processes, policies, systems & procedures that the firm has outgrown or will outgrow. So, in addition to your private weekly call with your CEO to help you keep your eye on the big picture, you'll also have a separate private call each week with your COO. Eventually, these calls with your COO will be handled by your office administrator. The exact things you'll cover during these monthly calls will be driven by the results of your infrastructure diagnostic (defined in your 12-Week Crash Course). But the basic agenda will generally be as follows:

- **Step 1-** Review the policies/procedures/systems we introduced last week to diagnose and fix any problems.
- **Step 2-** Introduce the policy/system/procedure we developed for you since the last call. Talk it through so you're comfortable and understand it. Also talk through recommended steps for implementation including staff buy-in.
- **Step 3-** Identify the next most important policy/system/procedure that requires attention and get a quick crash course lesson so that we can have a meaningful conversation about your options. There are always options for how things can get done.
- **Step 4-** Based on your input we'll draft the policy/system/procedure along with guidelines, instructions and recommended steps for implementation.

The idea here is to spoon-feed a busy lawyer not drown him/her with a fire hose. The goal is to get things implemented, in nice bite-size pieces every month. Usually what prevents a law firm from getting to and above \$500K while maintaining close to a 50% profit margin or what gets the firm stuck/stalled-out around this point is when it outgrows the expedient/disposable infrastructure that got it off the ground. This is not a bad thing. This is part of growing-up from a law “practice” to having a sustainable law firm business.

Your COO Service also includes a Strategic Planning & Calendaring Workshop every 18 months. This is literally how you will plan your firm’s growth and profits. Our team will spend two full days with you, laying out the tactical plan to accomplish the goals of your firm’s business plan.



CFO Service

Think about what a CFO does for the owners of big law firms. They depend on their CFO to supervise their book keeper, extract key financial reports and then sit with the CEO and equity owners of the firm to make pro-active, eyes-wide-open management & marketing decisions based on objective financial data. Solo & small law firms can benefit from this too. So why don't more solo/small law firms have a CFO? Because a good CFO typically earns upwards of \$150K/year and what's more, a good CFO would be bored silly in a solo or a small law firm because there just isn't enough to do. So, what do most lawyers do? They settle for a bookkeeper and try to get that person to function as a CFO. Or they ask their accountant to be their CFO. Apples are great for making apple pie. And bananas are terrific for making banana splits. Bookkeepers are not trained to do what CFO's do. Most accountants aren't either.

Your CFO will also set a tone and test your firm's bookkeeper, and make sure that they are providing adequate work. Then, your CFO will work to get the key financial reports from your bookkeeper, ahead of the weekly private scheduled appointment with your CFO. That meeting will take place in Zoom and we'll hold your hand and walk you through the analysis of your firm's key financial reports. We'll translate everything into plain English. We'll help you make important pro-active management decisions based on the numbers, not based on fear, guess or "gut".

In addition to all of this, your CFO service includes a Budget & Cashflow Workshop every 18 months, to help you create and plan a forward-looking financial plan for your firm's growth.

FINAL NOTE:

Sometimes new Members find our group to be “cliquey”, and that’s because it is. Not in a “high school popular kids” type of way, but cliquey in the sense that it’s Us vs. Them.

“Us” = Enlightened solo lawyers who started their own law firms to help more people and to have a bigger purpose – whatever that purpose might be to you.

“Them” = All the people who told you that you couldn’t build your own law firm and have a life too. All the other lawyers who will whine and complain about their law firms forever, before they actually do something to improve it. The Bar Associations, CLE events, and other legal vendors who look right past small law firms and possibly even think you’re doing something wrong if you’re making a profit off your business.

As a Member of the community, you are always with “Us” and part of the clique... It might be a little overwhelming at first, as you’re learning so much about the business of running a small law firm and meeting so many new people. To help with the overwhelm we’ve put together a glossary of terms for you:

LQM= Live Quarterly Meeting

DRAGON=Non-Attorney Salesperson. Often referenced in “Train Your Dragon”: Sales training workshop for non-attorney sales employees.

PSPs 101 / 201=Policies, Systems & Procedures for your firm. There is the first level of critical policies and procedures every law firm must have documented which is 101, then the second level which is 201, and so on.

G.A.S. = Give a Shit. Often referenced in “GAS Calls”: Give a shit calls to former clients/referral sources to check in and see how they’re doing, which will usually result in more business from them.

Taye Astuya = Take All of Your Excuses And Shove Them Up Your Ass. Yes, really. When the going gets tough, this is what we all must tell ourselves, because anything worth doing won’t be easy and there will always be something else you’d rather be doing.

The Bubble = Often used to reference the HTM community and the mindset, values, and beliefs of abundance that our Members have about growing a small law firm and being an entrepreneur. *Also see term, “Bubblemates”.*

Bubblemates = A self-proclaimed term by HTM Members when referring to their fellow members within the community.

Coffee is for closers = A homage to the popular movie, *Glengarry Glen Ross*, with Alec Baldwin. If you close a sale, you get to drink coffee. If you don’t close the sale, you get steak knives. There is no in between and the first place winner gets a Cadillac El Dorado.

I entered my freakin’ numbers = The art of using The Law Firm Business Dashboard we provide you with (or any dashboard for that matter) to track your law firm’s metrics and goals! Using the Dashboard and inputting your revenues, marketing metrics, and financial projections actually gives you clarity.

The how does
not matter
until you have
a good enough
Reason why

