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Starting Your Law Office

LAW OFFICE PRACTICE

Themes:

- Review the business side and protocols, policies, procedures that you need to start and maintain a law office.
    - Keeping in mind these are key points; this is not an exhaustive list.

Conversation Starters:

- Business Plan - Do you have a written version of your ideal business plan with your firm mission and vision? Discuss the following with the expectation that they will grow as your practice grows:
    - Target demographic, expected earnings, marketing strategies, expected costs (startup costs)
    - What type of business structure your firm will need (LLC, PS, C Corp, etc.)*
- Insurance Types - What are the various types of insurances; malpractice and general liability (renting/leasing office space); cyber-liability insurance?
- Policies and Procedures – What written policies and procedures to you have?
    - Active Case File List, Client Communications, Calendaring Systems, Conflicts of Interest Checks System, Confidentiality, Checklists and Systems, Billing, Personnel, Technology, Document Retention, Succession Planning.

* Choosing a business entity structure can have significant statutory and professional responsibility implications. If you are unsure of the business structure you need, it is recommended that you consult with a business entity lawyer.

Conversation Starters (continued):

- Templates/Forms - Do you have forms or know of filed cases which might have pleadings I can use as a resource? Do you have examples of the most commonly used templates/forms?

  Pleadings
  - Motions and Orders;
  - Discovery (including party and non-party subpoenas, subpoenas duces
  - tecum, interrogatories, notice of intent to subpoena protected records
  - notice of deposition, etc.);
  - Notice of Intent to Withdraw.

  Client Management
  - Engagement/Disengagement Letters;
  - Fee Agreements;
  - Client Intake Forms;
  - Billing Correspondence;
  - Conclusion Letters (for withdrawal and return of funds, etc.).

  Firm Administration
  - Procedural Checklists (for ensuring that procedural steps are taken in a timely fashion for service, discovery deadlines, etc.);
  - Letterhead Templates.

- Marketing – Do you have a marketing plan for your firm and does it include social media? What techniques do you find most effective? Are there any ethical considerations I should be aware of?

Activities:

- Have the mentee create a realistic budget – include fixed monthly/annual costs (office lease, insurance, parking, bar dues) have a list of fluctuating costs, with highs and lows (CLEs, travel, marketing, office supplies), list of assets with one-time purchase price (hardware/software)

  - Assess what your minimum hourly rate needs to be to maintain and grow your firm.

  - Plan ahead for employees, specifically awareness of tax reporting requirements, L&I requirements, and in-house policies for hiring, firing, discrimination, social media, and maintaining confidentiality.

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Activities (continued):

- Take the new lawyer on a tour of the mentor's office, explaining how client files in mentor's office are managed and discussing the best practices for the following related issues:

  Case and Matter Management
  - Conflict Management
  - Client Intake and Developing a Case Plan
  - Documenting Case Progress and Deadlines
  - File Organization
  - Closing Matters

  Client Relationship Management
  - Correspondence Templates
  - Client Education
  - Crafting Detailed Time Entries
  - Client Retainer and/or Payments Schedules

  Firm Administration
  - Recording Client-Related Expenses
  - Billing and Software Systems
  - Payroll and Tax Accounting
  - Trust Accounting
  - File Retention and Inventory Review

Resources:

- Discuss what additional resources the mentor/mentee has found useful in their own practice.
- ABA Law Practice Division, ABA GPS Solo Magazine
- Washington State Bar Association
  - Practice Management Assistance
  - NWSide Bar Blog
- Local bar associations may have additional resources.