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New Solo Checklist to Open and Run a Firm

Diane L. Camacho and Joshua Bonnici
June 16, 2023

Meet the speaker

Diane L. Camacho, CLM

- ❖ DLC Consulting Services, LLC
- ❖ Adjunct Professor, San Francisco State University



- Founded DLC Consulting Services in 2013
- Thirty-five years in law firm administration
- Fourteen years on the board of the San Francisco Chapter of the Association of Legal Administrators, President twice
- Education Committee member for the Contra Costa County Bar
- BS in Organizational Leadership and Management from the University of San Francisco
- Certified Legal Manager



§ 502(b)(2) of the Uniform Commercial Code

- Team
- Formation
- Mitigating Liability
- Finances
- Technology



Your Team

CPA &
Bookkeeper

Banker

Business
Attorney

Insurance
Broker

IT
Professional

Marketing
Support



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Formation

- Business Entity
- Physical Address
- Partnership Agreement or Incorporation Documents



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Licenses

Taxes

Bar Association



Things to Think About



**Where will
you get your
mail?**



**Will you be
using your
current cell
phone?**



**Do you need a
place to work
from outside of
your home?**



Mitigate Liability



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Insurance

Professional Liability Insurance

General Property and Casualty Insurance

Workers Compensation Insurance

Cyber Insurance

Life Insurance



Documents



- Engagement Agreement
- Disengagement Letter
- Not Taking Letter
- Disclaimer on Email



Engagement Agreement

- What You Will Not Handle
- Use of Contract Attorneys
- Flat Fees Retainers
- Document Retention [including e-files]
- Electronic Communication



Things to Think about

- Your Business Should Be In Your Trust
- Life Insurance to Cover Liabilities of Business
- What Happens If You Become Incapacitated
- What If You Want To Take Vacation



Finances



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Trust/IOLTA

Record Keeping

Reconciling

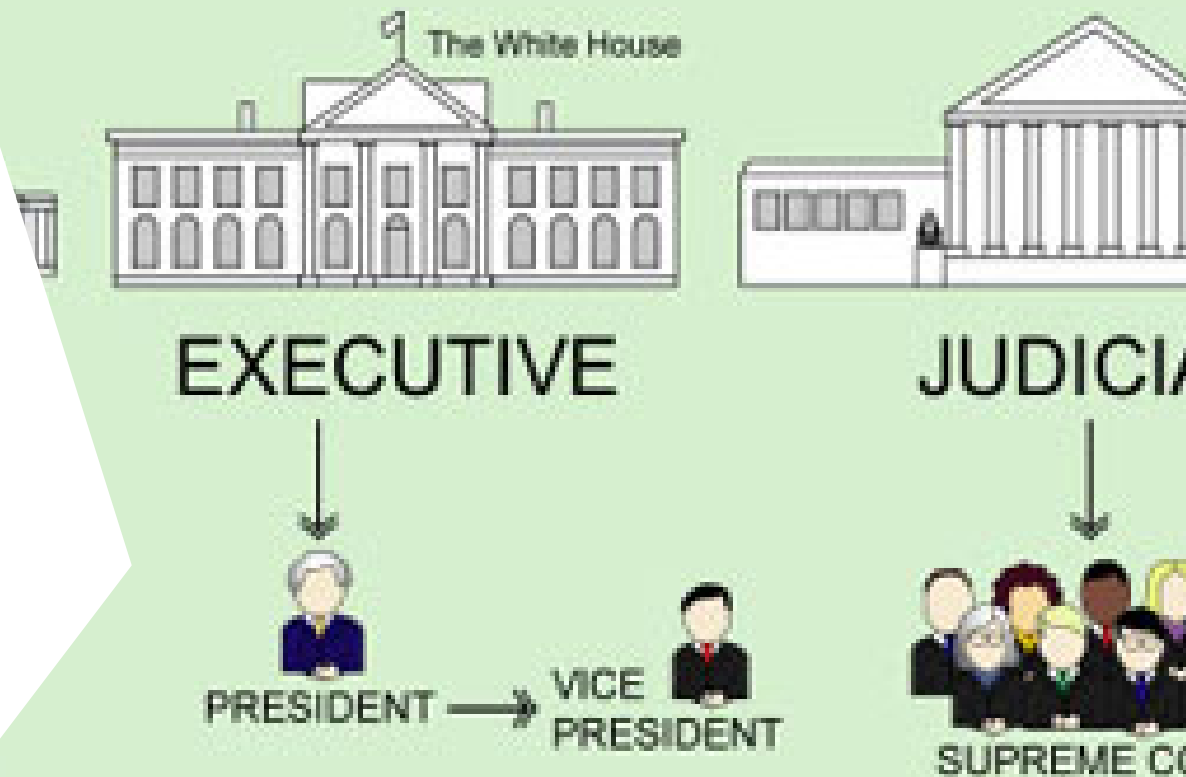
Co-Mingling Money



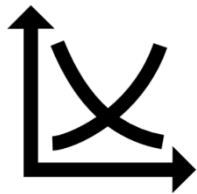
Three Branches of Government

Checks & Balances

- Review
- Access to Accounts
- Billing
- Accounts Payable



Budget



Revenue
Expenses
Funding



Reports

- Profit & Loss
- Balance Sheet
- Hours Worked, Billed & Collected
- Types of Cases
- Referral Source

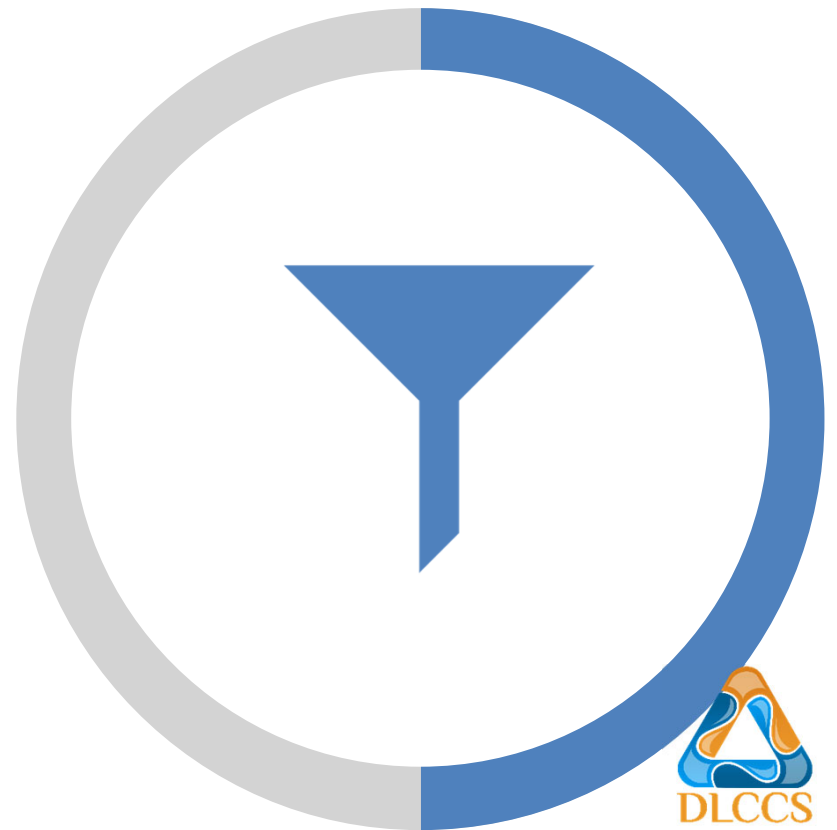


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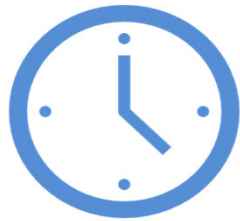


Marketing ROI

- \$2,000 per month on marketing
- 100 leads from marketing
- \$100 per lead
- 50% of the leads convert into cases
- Average case is \$5,000
- ROI = \$200 for each \$5,000
- Don't forget to track your marketing time!



Things to Think About



Where are you
spending your
time?



What is the value
of your time?



Your bookkeeper
cannot be
dis-barred





The Basics



Word
Processing



Email



Client Document
Storage



Forms



Research



Time & Billing



Finance



Choosing Software & Hardware

Versatile

Mobile

Secure

Common

Support



Things to Think About

- Hacking
- Securely Exchanging Client Information
- Your Business Computer v. Your Family Computer
- Training



“ Questions?





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New Solo Checklist

Run Your Firm

Speaker: Joshua Bonnici, Esq.



Meet the speaker

Joshua Bonnici, Esq.



- ❖ Bonnici Law Group, APC – *Managing Attorney*
- ❖ Domestique Consulting – *President*

- Opened Bonnici Law Group in 2012 as a solo practitioner with zero clients
- Grew firm to seven-figures in four years
- Current Vice Chair of Solo/Small Firm section of CLA (formerly CA State Bar) & past EIC of quarterly publication *The Practitioner*
- Adjunct professor at Thomas Jefferson School of Law
- Co-author of: *Opening and Managing a Law Office*
- Weekend bicycle racer



Agenda

01 | Opening Your Business – *Thanks, Diane!*

02 | Proceduralize Everything

03 | Specialize and Narrow the Funnel

04 | Staff Up and Delegate!

05 | Q&A



Proceduralize Everything



**Almost all quality
improvement comes via
simplification of design,
manufacturing... layout,
processes, and procedures.**

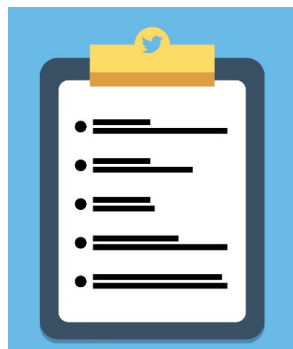
TOM PETERS

EVERYDAYPOWER

Outline Every Step of the Way

Regardless of practice area, each case should have a predictable timeline and list of items/tasks that are necessary to process through the firm.

Do you have a written list of what occurs at each predictive step for a client?



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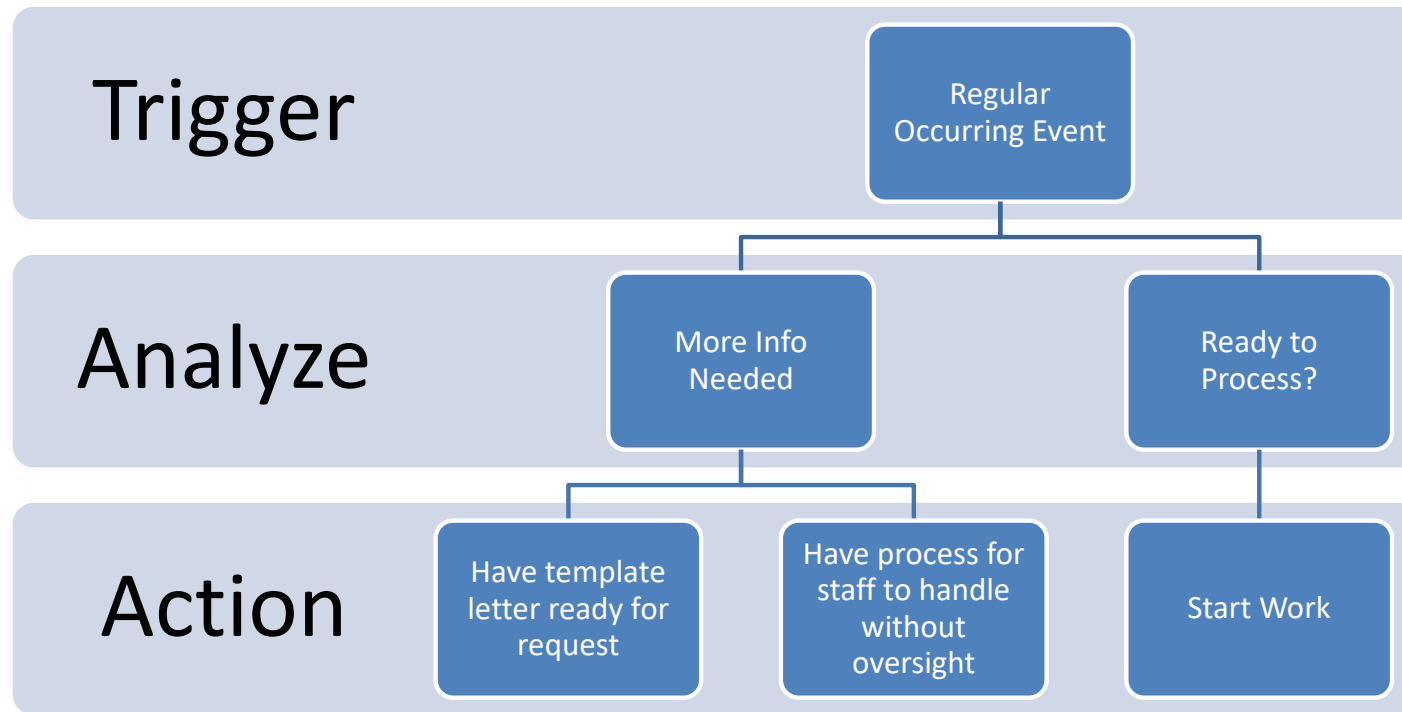
You may know what needs to be done, but having a list keeps consistency, and is delegable.



Put it in Writing – New Client Example



Create Your WorkFlow for Each Task



Identify Steps in Your Process – Then WorkFlow

☐ Client Sign Up

- Who handles new client inquiries?
- Office-wide intro email – who sends it?
- Calendaring SOL/deadlines – who inputs dates and on which calendar(s)?
- Who will be main communicator with client?

☐ Evidence Collection

- Who sends subpoena?
- What vendor is used for each request?
- What follow up is required?

☐ Notice of Deposition

- Check file for necessary supporting documentation
- Send letter outlining date of deposition and prep meeting

☐ Mediation

- Who drafts brief?
- Notice letter to client
- Evidence preparation

☐ Calendaring/CRM Organization

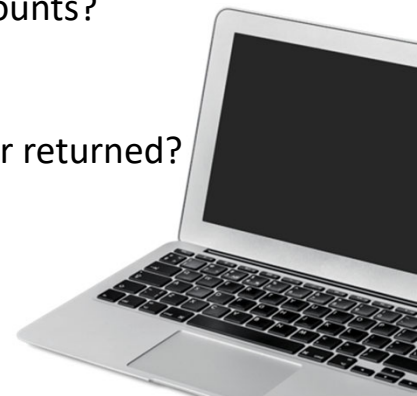
- Who calendars SOL?
- Who is in charge of making sure case information is updated in firm CRM?

☐ Bank Account

- Who is in charge of firm bank accounts?
- Who pays costs/bills?

☐ Client Follow Up

- When are client follow ups made or returned?
- How are they documented?
- Regularly scheduled check-ins?



K.I.S.S. – Keep It Super Simple

The whole point of the Procedure List is to free up your time to “lawyer” (or vacation or passion project or _____) and empower your staff to complete easy, repeatable tasks without your direct involvement and oversight.

No employees yet? This checklist will make sure nothing is missed and simplify your to-do list



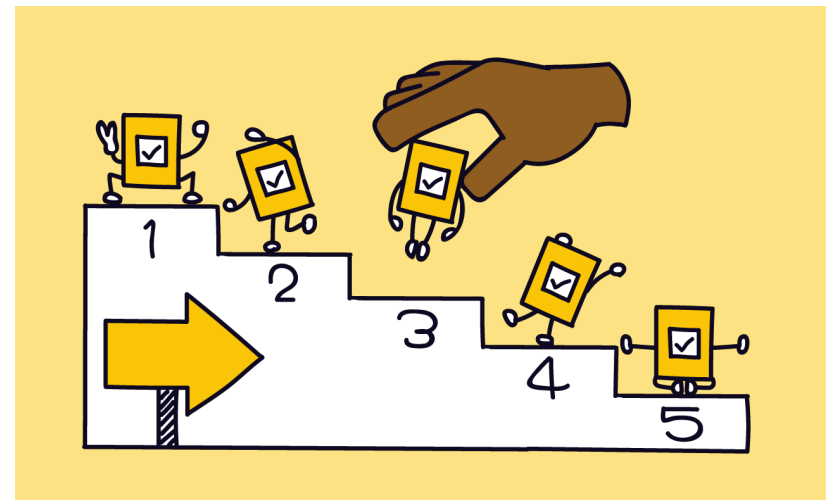
Prioritize Regularly Occurring Tasks and Procedures

Communication Response

1. New Client Inquires
2. Court contacts
3. Client request for contact
4. Communications regarding settlement
5. Opposing Counsel contacts
6. Insurance adjusters contacts
7. Etc.

Tasks

1. New Client file building
2. Court deadline tasks
3. Case settlement paperwork
4. Client follow up communications
5. Etc.



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Niche and Narrow the Funnel

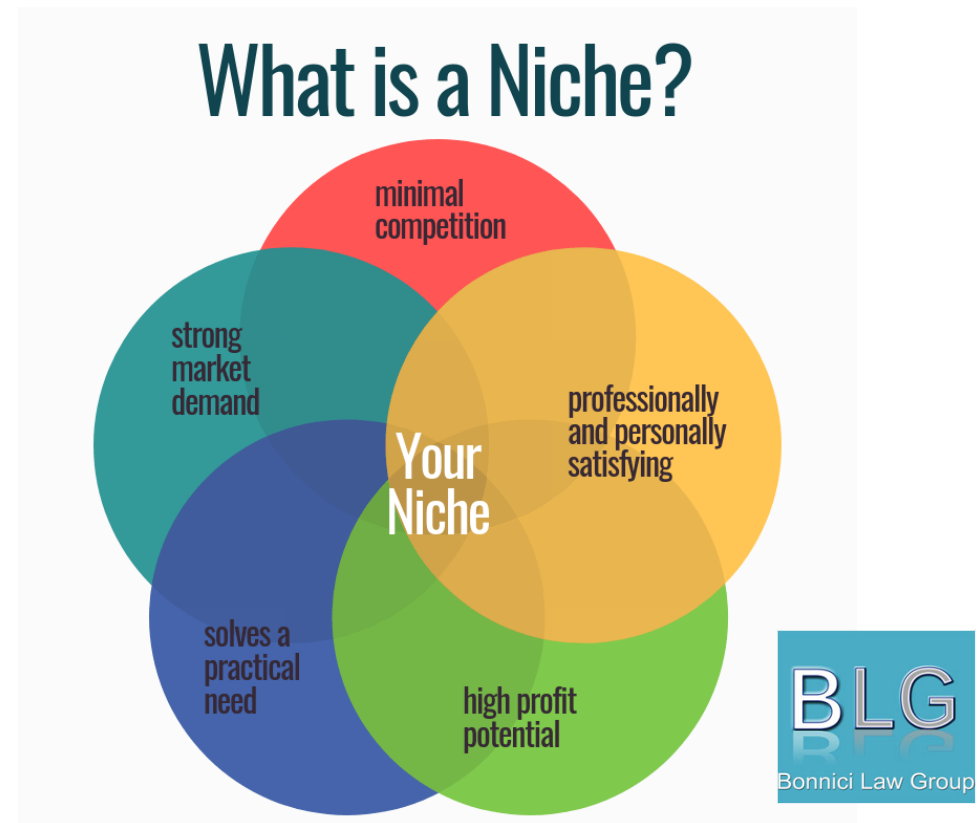
**“defining your target market
or niche is the single most
important business decision
you can make as an entrepreneur”**

Saskia Gregory



What Does Niching a Practice Mean?

- Branding a law firm beyond a general practice area.
- Focusing on a specific “sliver” of the practice area – while not ignoring the broader case types.
- The ability to differentiate yourself from competition by focusing on a particular type of client/set of facts.
- All the while the ability to take a broad spectrum of your practice area



Communication with Your Target Market

People make their choices on who to do business with based on three main principles:

1. Do business with Who they KNOW
2. Do business with Who they LIKE
3. Do business with Who they TRUST

Potential clients and referral sources will *know* you based on your niche area as it makes you top-of-mind by topic identification. This is the first step.

**Positioning
yourself as an
expert in your
niche builds
trust in your
community.**

The general public doesn't always think in normal "law" or "practice area" terms



Generalist v. Specialist

Position yourself as *the attorney* for that niche, you are the *go-to* resource and specialist* in that area.

Consider:

- A legal “generalist” knows an inch deep about a mile wide of topics.
- A legal “specialist” knows a mile deep about an inch wide of a topic.

Pinpointed marketing can be cheaper – fishing in a smaller pond... for bigger and better fish!

**Make sure to check with your local Bar on using specialist language*



Branding as Best Resource For Niche

Build Your Brand To Be Synonymous With Your Niche



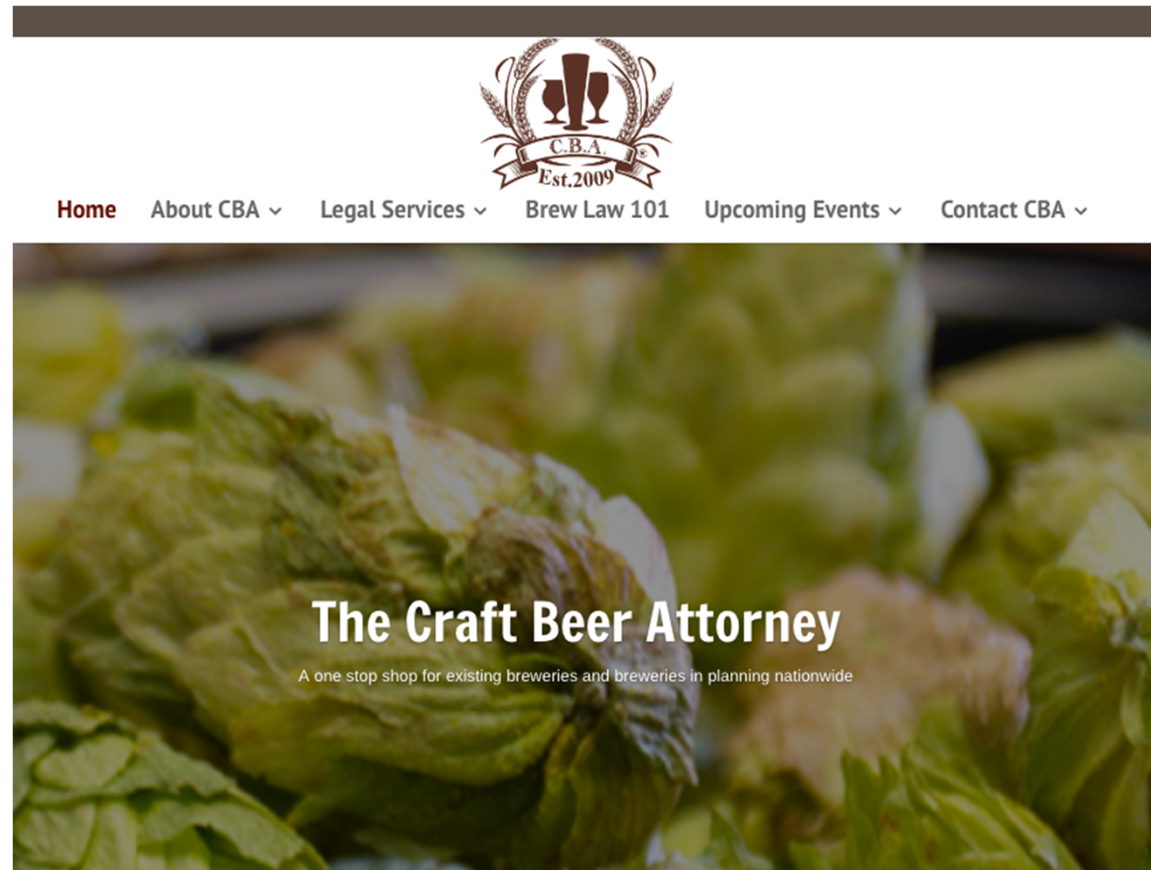
- ☐ Become the “[fill-in-the-blank](#)” attorney within your network
- ☐ Get involved in your community within your niche - maybe you already are without the niche
- ☐ Utilize social media – niche specific accounts
- ☐ Show why you’re special when it comes to your niche practice area
- ☐ Plug into affiliated groups. Identify, join and find ways to get involved in related associations, from serving on committees to providing thought leadership. Oftentimes you find yourself as the only lawyer, or one of just a few lawyers, in the group.

Case Studies

Craft Beer Attorney

- Run by business attorney Candance Moon, Esq.
- Niche business law practice to craft breweries
- CA has the most craft breweries per capita than any other state in US (over 900 in 2022!)
- Beer connoisseur

www.craftbeerattorney.com



Top-of mind for anything “beer” related in CA

Case Studies

Bonnici Law Group

- Experience in Personal Injury Litigation
- Passion for cycling since a teenager
- Enjoyed working with cycling clients
- Cycling accidents tend to be higher value
- San Diego is a year-round cycling destination
- CA has the 6th most bicycle accidents than any other state





Safe Sport
Bronze Level

SAN DIEGO BICYCLE CLUB

San Diego's oldest and largest racing and recreational cycling club

April is Membership Month!

For all of April 2023, new members get 10% off membership fees!

Member Benefits

- ✓ Free weekend club and training rides for all abilities
- ✓ Racing teams for juniors, men, women from novice to Cat 1 including off-road and Masters teams
- ✓ Discounts and Club Nights from our sponsors, including nutrition products, glasses and other sponsor items
- ✓ Membership to the SDBC Team Clothing Store
- ✓ Special Rides and Events throughout the year



www.bonnici lawgroup.com

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Staff Up & Delegate!



**If something can be done 80% as
well by someone else, delegate!**

John C. Maxwell

quote fancy



Recognize The Cost and Time Saving

Offset the cost of employees:

- ☐ Delegating tasks from your list gives you more time to focus on lawyering, rainmaking, vacationing, etc.
- ☐ If hourly, gives ability to bill client for admin work at lower cost, saving client money and allowing you to handle more higher-billed tasks
- ☐ Office hardly “closed” when you are away
- ☐ Payroll is a write-off



Hire For The Position – And What You *Don't* Have

The sooner you hire, the sooner you can focus on your tasks and delegate.

- ☐ Hire staff before they are necessary. Roughly a 90-day training window
- ☐ For support-staff, hire personality and culture. Most knowledge can be taught easily
- ☐ Look for team members that have skills, knowledge and drive in areas you currently lack.

“Acquiring the right talent is the most important key to growth. Hiring was - and still is - the most important thing we do.”

Marc Benioff, Founder, Chairman and co-CEO of Salesforce

Client manager, report/calendar expert, task oriented, professional writer, etc.



Delegation Is The Secret Sauce

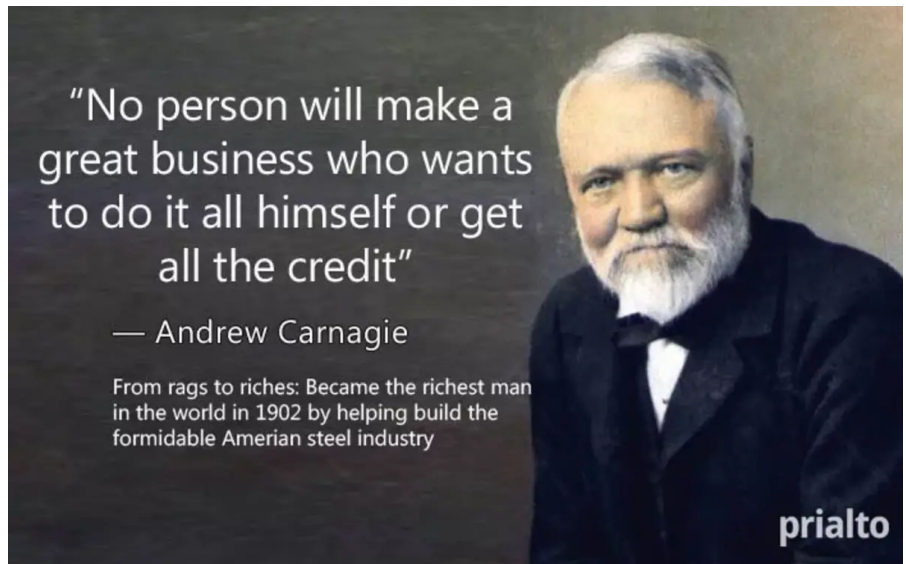
Delegate tasks based on specific criteria:

- ☐ Who can do the work
- ☐ Who enjoys the work
- ☐ Who is good at the work

Setting guidelines and expectations for what one's job really is does two things:

- Identifies who should be doing what task
- Outlines what the role of that team member on each case
- Empowers that team member to be the expert on that thing

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Give Team Members Authority & Responsibility

Employees stay when they are:

 **Paid well**

 **Mentored**

 **Challenged**

 **Promoted**

 **Involved**

 **Appreciated**

 **Valued**

 **On a mission**

 **Empowered**

 **Trusted**



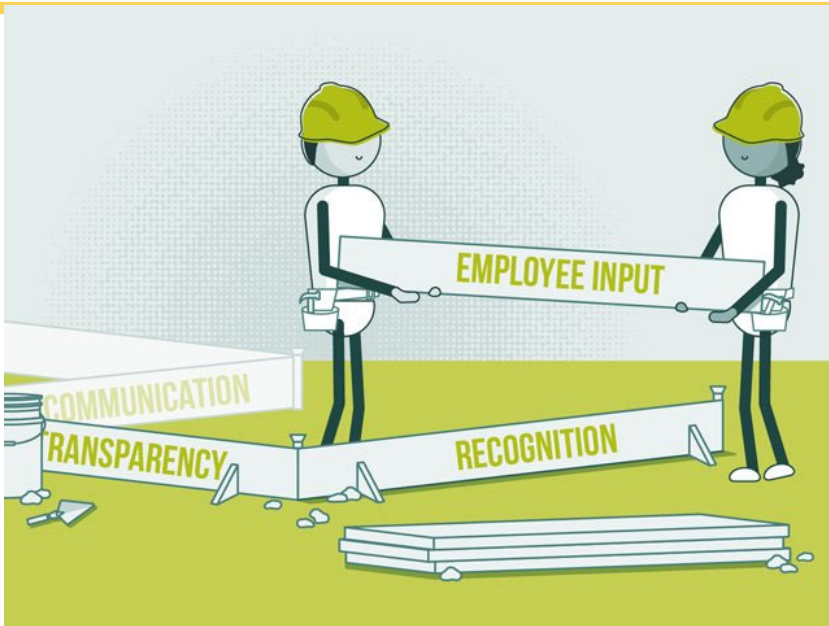
Once team members are trained and in the trenches, return to them periodically and ask how their jobs could be easier or more streamlined.

When they have a voice in controlling their WorkFlow process they can better how they work and be more efficient.

Once or twice a year meet with your team and ask for suggestions on bettering your procedure list.

Since they are knee-deep in those tasks, allow some constructive criticism on how to better the system.

Mutual Respect and Admiration



Consistently remind your team members that they are a valuable link in the chain that keeps the business going, and showing them how and why, keeps the well-oiled-machine moving forward.

Having a staff that enjoys their job (as much as possible) and feels they have a say in the process will be more committed and work harder.



Thank you!



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