"OUR CLIENTS LOVE US...MORE THAN THEY DID BEFORE"

Yeti Agnew, Legal Sherpas. We provide a better service to our clients. Clients [and others] comment favourably about their service experience to us. Our clients love us...more than they did before. We are getting more referrals from satisfied clients. We are getting more referrals from our referral sources. We’re learning how to differentiate ourselves in the market and how to market ourselves in a distinct way. Working with Alexis has been the most exciting and the most demanding CLE I’ve done since being called to the bar. She has great ideas, coupled with real openness to adaptations of her ideas to our practice in our market. It has not been easy unlearning years of “professional practise” experience and questioning the common wisdom out there. Similarly, it has not been easy to learn new habits, change the operations of our office and train staff in new ways of serving clients, but it is definitely worthwhile and immensely rewarding on many levels.

"IN THE PAST 5 MONTHS, WE’VE ONLY HAD 3 PEOPLE DECLINE TO RETAIN US..."

Michael DellaMonaca, Massachusetts. I’m really just ecstatic because these techniques can be so simple. You have to do the work, follow & have faith in the systems, but they’re very basic, and they’ll come to you naturally. It’s all these “Why Didn’t I Think of This,” type of moments – it’s all very basic, common sense.

I was keeping very careful records on the number of clients I was engaging with your system and I said to myself, “I’m not going to keep something that’s not paying dividends for me.”

So, I expressed my desire to return the system, but agreed to talk with you... meanwhile, I made a tweak here & there, reviewed the system materials... maybe it was the 'Break-down before the Break-through” but my engagement rate went from 3 people saying “no thanks” despite using your system... to now, in the past 5 months, we’ve only had 3 people decline to retain us.
Retention rate now stands at 87% and if we count people who were personally referred to us, it’s close to 100%. I was lucky to hit 70% prior to using your system.

Needless to say I’ve paid for your system many, many, many times... I don’t have a million-dollar practice because I don’t want one. I want quality of life. Today I had a very fun day. I got to ‘just talk’ with people, I got to be a human being and relax. I wasn’t on edge, I wasn’t trying to sell anything. I mean, how many lawyers are actually having this much fun!

“...ENGAGING CLIENTS FEELS LIKE A VALUABLE CONVERSATION...”

Rebecca M. Prien, Esq., Counsel to Creativity, LLC. This month I have engaged two clients for $8,000 of legal services each. And those are only two of the shifts that the System provides attorneys. Still, the most significant thing for me is that engaging clients feels like a valuable conversation and not at all like “selling” them on me anymore.

“MY FEES HAVE MORE THAN DOUBLED, SO I AM DOING LESS WORK FOR TWICE THE MONEY.”

Brent Ripley, Jamestown Estate Planning, Provo, UT. The most important thing I have received is guidance and help to structure my practice. I don’t want to say ‘seat of the pants’ affair before, but I didn’t have anything that was helping me get people through the process of estate planning from start to finish in an organized fashion. Every case was a little bit different and every close was a little bit different and now I have the guidance I need for having the right employees, having the right systems in place. It gives me more free time, it makes me more money, and it makes me feel better about the end product because I know it’s the same as the one before. My fees have more than doubled, so I am doing less work for twice the money.
“...WE HIT THIRTY PERCENT GROWTH LAST YEAR...”

Michelle Beneski, Surprenant & Beneski, P.C., New Bedford, MA. I’ve been a Personal Family Lawyer for about a year and a half now. My documents are much better because I’ve gotten some great office systems in place for quality. As far as my clients, I practice mostly elder-law, so being a Personal family Lawyer has helped me bring in younger families, which is developing a whole new niche for me. It’s been very rewarding for me both personally and financially. I’ve made more money: we hit thirty percent growth last year, top line. I’m very excited about that. I’m a big believer in a lot of the same principles that you follow in marketing. We’re growing.

“[CLIENTS] ARE JUST AMAZED AT ALL THE SYSTEMS AND PROCESSES THAT ARE IN PLACE AND HOW EFFICIENT AND COMPLETE THE PROCESS HAS BEEN.”

Gerald Kane, Gerald L. Kane & Associates, Encino, CA. The results have been absolutely fantastic. I’ve been able to bring more of the right kind of people into the office, been able to close more of the people that come in to the office, the profits and revenues have gone way up. Where before I’ve been charging to $2,500, I’ve been charging $4,000 to $6,000 per individual that has come in. Also, I’ve had clients that are saying wow, everything is fantastic and you’ve thought of everything and there is not a single thing you could do better or different. They are just amazed at all the systems and processes that are in place and how efficient and complete the process has been.

“BEING A PERSONAL FAMILY LAWYER® HAS GOTTEN ME EXCITED ABOUT BEING A LAWYER AGAIN.”

Susan Kirkpatrick, Olympia, WA. I’ve been a lawyer for 27 years and 3 to 5 years ago or so I was really reevaluating whether that was a good decision for me and did I want to continue in the practice of law. I knew I loved estate planning but there were aspects about being a lawyer that frustrated me and I couldn’t come up with an alternative model on my own. Being a Personal Family Lawyer® has gotten me excited about being a lawyer again. She’s provided an alternate model that has gotten me enthusiastic about the legal profession and what I can do on my own career and practice.
What They Didn’t Teach Us in Law School

What you hold in your hands now is a snapshot of 8 years of extensive & expensive “on the job” research and testing I conducted in my own law practice as well as the law practices of over 100 lawyers, many of whom you will hear from directly within this report.

Until now, the information I share here has been closely held and only available to select lawyers who were accepted into my elite Personal Family Lawyer® and Creative Business Lawyer™ programs.

These lawyers have paid tens of thousands of dollars to have me remake, remodel and redesign their businesses.

*I strongly suggest you print this manifesto out right now, and read it immediately.*

Turn to the next page for an important chart that’s going to change your way of thinking forever.
Print that out and hang near your workspace. There’s a very big idea inside it and many lawyers have not only made a fortune, but gotten back to the reason they became lawyers in the first place, once they grasped the concepts you are about to receive right here for free.

Some of what I share may get you riled up or leave you feeling a bit overwhelmed – good, it’s the start of a big shift in the way you think about yourself and your business. Here’s an important concept to remember through all of this: all growth happens outside your comfort zone.

**It’s time for you to get a little uncomfortable** – that is if you want to have the business and the life you know you deserve.

Your rewards will be great.
Who Is Alexis Neely?

A few years ago, you may have met me at any number of estate planning events at the California State Bar, Wealth Counsel, maybe even an ABA meeting or possibly from one of the email listservs you are on.

I attended and was a frequent speaker at many of these events when I was an associate at the big law firm I joined out of law school and in the first year or so after launching my own law firm.

Then a few years ago, I stopped participating in legal/technical training events nearly entirely.

Why did I do that?

My business was drowning me. I was working 6-7 days a week and keeping very little of the money I was bringing in. I realized that if I didn’t take drastic action, it wouldn’t matter how great a lawyer I was - my family and my clients were at risk if I didn’t get control over my business.

The legal community couldn’t teach me what I wanted to know – even the most successful lawyers were stuck in an outdated business model that kept them on the same old marketing merry go round with not much to show for it year in and year out and with nothing to show for it after even 25 years in practice.

SO, I DECIDED TO LEARN EVERYTHING I COULD ABOUT BEING AN ENTREPRENEUR AND BUILDING A REAL BUSINESS, INSTEAD OF A PRACTICE.

I went outside the legal industry and studied everything I could about sales, marketing, business planning, management, leadership and systems with the hope of discovering the secret to building a successful law business that would not only provide my clients with extraordinary service, but that I could one day sell and retire from.

The most important thing about my business was that it would have to continue to serve my clients and fulfill on the promise of relationship I made to them without driving me insane working 6-7 days a week running like a hamster who can’t get off the wheel.

My business had to give me the freedom to be with my children as they grew up because by then I was a single mom and could not bear to be away from my kids as much as I would have had to if I had not figured out what I am sharing with you here.
If you’re a law business insider, chances are you’ve heard the story of how I built my law practice from nothing (or should I say less than nothing) into a million dollar law business where I only went into the office a few days per week and didn’t even have a desk – and all within just 3 years time.

Here’s the good news, if you want to, you CAN do this too!

Now, I want to be clear about something right up front – I do not recommend that you build a million dollar practice unless you are the 1% of lawyers that is right for, but I do recommend that you build yourself a business that brings in revenue of between $250,000-$500,000 per year and gives you a nice take home you can count on with the flexibility you want.

But to do this WILL take some pretty major shifts in your mindset. If you haven’t heard my story, read on...there are many instructive lessons.

What you’ll learn in this Manifesto will either begin to open your mind to the shifts that will change your business and your life, or it may be confirmation of shifts that have already started to happen.

Either way, sit back, relax, and get ready, because what you are going to discover will be the start of something you’ve been dreaming about for a long time.

I’ll start by giving you some idea of what opening up to new ideas and possibilities did for my business and my life...it’s revolutionized everything for me and if you hear about what they’ve done for me, I hope it will inspire you to at least try some of this for yourself:

Within 3 years of opening my law practice, my law business went from nearly collapsing to earning more than a million bucks a year ... if I can do it while going through a divorce, and raising 2 kids, you can do it too!

Starting in 2006, I gave up my desk in the office and in 2007 went into the office only 2-3 days a week while still bringing in over a million dollars in revenue.

Imagine what you’d do with all your free time, if you could get a handle on your time, your team and your revenue.

With my free time, I began to train other lawyers, like you, on how to implement my systems into their own law practices so lawyers who want to practice like I did do not have to reinvent the wheel and create it all from scratch, as I had to.
The REAL Reason I’m Doing This?

I had a mission of creating something that **would allow lawyers to love the law again and to be loved and respected in our culture again.** I had a mission to help both experienced and newbie law business owners re-engineer their strategy and systematize their processes, **allowing you to multiply your profits while slashing the number of hours you worked.**

I dreamed of creating a system of law business that would radically and forever change the traditional model that focuses on billable hours and form documents that leave clients unsatisfied and bewildered. I envisioned a business that brought back personal legal counsel as they used to be provided in the good old days, the town lawyer who was the trusted advisor families turned to for guidance before making critical financial and legal decisions.

That vision has become a reality and is spreading far and wide. Today, my systems are being used in many states with a vision of having a Personal Family Lawyer in every town in the United States. Today, these systems have been packaged in such a way that any lawyer who wants to do business the PFL Way™ can **apply the systems to their own practice even if I am no longer here to coach and guide!**

Because now, I focus my time on writing on my blog, being with my children and coaching lawyers and entreprenuers enrolled in my programs.

What this means is, aside from a select group of law business owners, most lawyers may never get the chance to work with me personally ever again.

That’s why I decided that it was time to get this information out there for everyone to benefit from. **It’s too important and transformational to keep it a secret** available only to the few lawyers who were here to work with me personally.

A proven model for revolutionizing the way law businesses operate that allows **smart lawyers** to re-engineer their **strategy** and systemize their **processes,** while **multiplying** their **profits** and **slashing** the number of **hours** they work.
The Reason Why Most Law Business Owners are Frustrated, Stuck and Not Getting Ahead

I talk to a lot of lawyers, most of them are frustrated either with not enough business coming in, not enough money staying in their bank account or they feel trapped by an unhealthy addiction to the next new client and wishful for more satisfaction and fulfillment from their practice.

It kills me that every new lawyer hanging out their shingle has to start from scratch and build their business without a model to follow, without the benefit of time-tested systems that work, without a nationally-branded enterprise that’s created and systematized “the way to do it.”

Lack of basic business building know-how is really the primary cause of so much frustration, struggle and time wasting. It’s the reason an overwhelming majority of lawyers new to the solo and small law firm model will fail even if they work extremely hard, go to lots of seminars, join lots of organizations, and hire lots of consultants who profess to teach them how to do it.

I’m going to address the issues I see, because I know from past experience that my unique perspective – as both a lawyer and an entrepreneur - can make a tremendous difference in your business, as it has for the lawyers who have worked with me.

I simply cannot stand by any longer and allow your dreams to fall by the wayside due to a misunderstanding (on my part too!) of how successful businesses are built.

This Manifesto will uncover those issues, step by step, and you will gain clarity about your relationship to your law business (and how to grow it) – a clarity that you’ve never had before.

But first, let’s take a look at the state of the law business today and put it in perspective with traditional business....
Putting The Law Business Into Perspective – When Practice Doesn’t Make Perfect

Before we dive into strategies, let’s step back and put “law business” into perspective. You need to see how it fits into the larger world of “business.” Looking at how traditional business evolves will give you some idea of where the current state of law business is, and how it’s changing.

The concept of “law business” is so foreign that if you do a Google search for these two concepts you get zero results that are on topic and related to the actual management of a law business.

**There are plenty of resources on Law Practice Management, but not a one on Law Business.**
That tells you something, doesn’t it?

What it tells me is that lawyers don’t think in terms of business as it relates to their own businesses. Rather we think of “practice management” instead.

Let’s look at what this means on the psychological level …

One of the definitions of the term “practice” is: “to work at, especially as a profession: practice law.”

And that’s exactly what I discovered after I launched my own law practice ... I’d have to work at it for the next 20-30 years at least. And, at the end of the day, what would I have but a collection of old client files full of people depending on me and no way to cash out? When would I get to travel? Spend time with my family?

**Where was the freedom** I had been looking for when I went out on my own?

When I first decided to hang my shingle, it was exciting. After spending a few years commuting 20 miles in Los Angeles traffic to downtown LA and billing long hours, I was eagerly anticipating the freedom of doing my own thing.

I imagined a steady and manageable stream of clients would come into my office; I would charge $2,500 to $3,000 for a comprehensive estate plan or $1,500 to incorporate a new business and engage 2-3 new clients per week, bringing in a nice $25,000 or so a month.
Plenty of money to support my family and keep my practice motoring along while I’d spend my weekends at the beach and my evenings watching TV, reading and taking walks with my husband and kids.

**Sounds nice, huh? The reality, of course, was far different.**

Little did I realize what it would really take for me to get to the place where I could steadily and consistently engage and service 2-3 clients per week.

- Engaging 2-3 clients per week meant I had to meet with 4-6 prospects per week because my engagement rate was a dismal 50% (meaning half the people who made it into my office would either cancel their appointments or decide not to work with me).

- To see 4-6 prospects per week, I would need to generate at least 8-12 phone calls per week because at least half of the people who called my office were shopping around on price or were not ready to make an appointment.

- To **generate at least 8-12 phone calls per week**—well, I had no idea how that was going to happen.

Naively, I thought I would speak to some local mom’s groups and that would do it.

But, I **found myself speaking to groups of mom’s, CPAs and others and getting rave reviews for my talks, but HARDLY ANY PHONE CALLS OR APPOINTMENTS AFTERWARDS.**

I was in big trouble if I did not figure out how to generate some business. Not to mention, all the other things I had to think about...

- How would I store my client data?
- Draft my documents?
- Create invoices?
- Keep track of their payments?
- Backup my computer system? Just to name a few ...
And that was just the beginning. It doesn’t even touch on all of the legal/technical training I needed.

I was exhausted and overwhelmed within the first few months. And **when I looked down the road for a light at the end of the tunnel, I truly couldn’t see one.**

The lawyers I rented office space from had been “in practice” on their own for between 10 and 25 years and yet 25 years into it they still hadn’t answered many of these questions and they definitely weren’t living the dream I had imagined of weekends at the beach and evenings with the family.

These guys were in the office 6 days a week and many evenings too. And not because they were being driven to do it by law firm management monitoring their billable hours – they were the law firm management!

The truly “successful” lawyers in the industry -- those who had a steady stream of business -- were working all hours of the day and night.

**I started to understand what it meant to “practice” law – just like the definition indicated it really did mean “to work at” – apparently forever!**

Somehow, it dawned on me that if I was going to realize my dream of having a life, taking great care of my clients, and making enough money to support my family, I was going to have to stop practicing and create a business that didn’t demand so much of me.

The only trouble was, I didn’t know anything about business.

Sure, I took “business law” in law school, but that didn’t teach me about business – it taught me about protecting the business owner from liability and about mergers and acquisitions of major corporations.

But creating and running a business?
1000s of Clients and Nothing to Show For It?

I decided I’d start by studying what the most “successful” lawyers around were doing. I noticed that there were some lawyers who seemed to have moved beyond the practice and into the realm of business.

I saw some common denominators – they all had a steady stream of clients coming in the door saying yes to planning with them. So, that’s what I focused my energy on. I would figure out how to get that steady stream coming into my office and saying yes – then all my problems would be solved. At least that’s what I thought.

It took me a year or so to build, but I did it. I ramped up my revenue to about $750,000 in 2005 and was on track to hit a million in 2006. I had the system for attracting clients and engaging clients and moving them through the process. For all intents and purposes, I was successful.

But, I discovered a gaping hole that I hadn’t seen when I was an outsider looking in at these other practices that appeared quite successful – they were, as Michael Gerber would say, “doing it, doing it, doing it” and there was not only no end in sight, but there wasn’t a whole lot of fulfillment in the doing it either.

These successful lawyers had gotten themselves onto a treadmill of dread – they’d built an overhead so big that if they tried to jump off the treadmill they’d be eaten alive by their own infrastructure within a month.

NEW CLIENTS BECAME LIKE A CRACK HABIT. All my focus and attention shifted from making a real difference in my client’s lives to bringing in that next new client who would pay me 3, 4 or $5,000. Once I got the system for it down, it became so easy that I couldn’t stop.

I was trapped on the marketing merry go round and cash flow roller coaster and I COULDN’T GET OFF.
I’d learn a new marketing strategy, put it in place, have success, get 5-10 appointments set, get busy meeting with and servicing the prospects I had generated and stop marketing; then there’d be a huge hole in my schedule, so I’d get focused again on marketing, spend a bunch of money (most of what had just come in from the new clients from the last marketing push), try a few different things, get some appointments set and once again stop marketing.

**Round and round I went. It was never ending.** I couldn’t count on a steady cash flow, which meant I was doing most of my marketing and client service work myself without the support of a team to help me.

And because I was only engaging half of the people I met with, **I WAS BARELY KEEPING ANY MONEY.**

So, I focused my energy on creating a system for engaging clients (I eventually got it up to close to 98% engagement at an average fee of $3,500), and the 2-3 clients per week increased to 4-6 clients per week after each marketing push, which was great, but required me to hire more staff to fulfill on the post-engagement process, which required me to generate more leads to pay the new staff, which required me to hire more staff to fulfill on the service.

**It was a constant roller coaster!**

One day I looked up and my fixed overhead was up to $70,000/month! Now that did include a nice salary for me, but still...

No money in the world felt like enough money to have to manage all of the problems that came along with such a big staff and the constant worry that I felt when my overhead was so high.

Oh lordy, I can’t even describe the cast of characters we had come through my office. At one point, I spent more time managing the personalities in my office than I did meeting with clients, I think.

**YOUR 1ST STOP—GETTING YOUR PROSPECTS TO YES! IF YOU ARE NOT ALREADY HEARING YES FROM JUST ABOUT EVERY PERSON WHO CONTACTS YOUR OFFICE ...**

visit [www.clientengagementsystem.com](http://www.clientengagementsystem.com) to increase your revenue right away.
And every so often (more often than I care to remember!) I found out that what I thought was getting done, wasn’t. At one point, we ended up with a massive funding backlog after it turned out our funding coordinator was just pretending to do the work! Oy vey!

I began to dread engaging more clients because I knew that it would just mean more work, getting more behind and more potential liability. But, at the same time, I couldn’t stop. I was addicted to bringing in that next new client and the needs of the business forced me to keep doing it, doing it, doing it.

My overhead became so bloated that I had to find a way to even out the influx of new clients.

I got a handle on the roller coaster that was my marketing and soon I was engaging a steady stream of 15-20 new clients per month – quite a bit more than the 2-3 clients per week I had originally dreamed about, but the reality was that 2-3 clients per week wasn’t viable because the overhead needs required to get the 2-3 clients per week and then service them required far more than the money the 2-3 clients per week brought in!

I was in a major quandary.

All I wanted was a nice little practice that would support my family and give me the freedom of nights and weekends with my family. In my quest, I had ended up with a big business with lots of clients, but I was bogged down in the reality of that business – employee needs, client service needs, and my nights and weekends were getting swallowed up.

And then what?

Why was I doing all this? Was this all there was? I had gotten myself onto the treadmill of dread and as far as I could tell there was no way off.

Sure, I had thrown out the time clock and I was producing a great deliverable in the form of a fancy binder with full color diagrams, but at the end of the day I couldn’t see how I could ever stop.

I needed a constant flow of new business or I’d quickly drown. And, I didn’t see how I could ever go on vacation, get sick or cut back on my hours.

Plus, I had spent years studying about the idea of real relationship with my clients and once I got a taste of it, I wanted more. I wanted off the marketing merry go round, cash flow roller coaster and treadmill of dread. Can you relate?
I wanted to create a new business model that would be fulfilling, both financially and personally. I knew it had something to do with relationship, but frankly, I wasn’t sure exactly what that was.

It was a word I used a lot in my client meetings – relationship.

That’s what I told my clients I was providing and how I justified someone getting their documents from me instead of buying them on the Internet or from the guy charging $1,500 down the street.

Yet when I looked around in my practice – and trust me, I searched high and low – I couldn’t find any relationship!

I was shocked to discover that the “practice model” I had adopted was premised on a constant inflow of new clients and a constant outflow of estate planning and business documents and then….. nothing!

Relationship? What relationship?!!

Can you relate to this? Are you really providing relationship to your clients or is it a fake relationship still focused on the creation of form documents and the sale of the next new product or strategy?

Take a good hard look and see if you see what I saw in my business.

Slowly, I started to realize my error.

I had followed the lead of lawyers who were proud to be serving thousands of clients when that wasn’t really what I wanted. I knew real relationship wasn’t possible with thousands of people.

And yet, the only other viable practice model seemed to be that I would have to spend 8-10 hours up front on the planning with a client and charge fees in the $10,000 range for a foundational estate plan or even $5,000 to incorporate a client’s business when I knew they could do it themselves for far less than that -- that wasn’t appealing to me either.

I was at a loss!
I finally realized the legal industry didn’t have the answers I needed – I hate to say it, but it was the blind leading the blind. All of these great lawyers, doing the best they could with the tools they had, but they were still in the mindset of “practice.”

If I was going to find the answer, I’d have to learn the way of true business from ground-breaking entrepreneurs—not from the same ole, same ole.

I stopped going to bar events and legal/technical trainings and immersed myself in study of the business greats. Over a two year period, I spent hours upon hours and put together my own on the job MBA course. It was well worth it.

The good news is that you don’t have to invest the time and money I did because I distilled it and I’m sharing it with you here.

It’s Time For You to Learn the Time-Tested, Proven Secrets of Service-Focused, Financially Sustainable, Entrepreneurial BUSINESS.

Systems
Lifetime Value of a Client
Good Enough is Good Enough
Focus On Your Ideal Client
Simplicity

THE BUSINESS OF LAW IS NOT DIFFERENT
What You Can Learn
From the Real Life Gurus of Business ...

Michael Gerber, Peter Drucker, Dan Kennedy, Rich Schefren

I read everything I could get my hands on and started attending loads of live events where I’d get a chance to learn from real deal entrepreneurs and business owners who had built successful businesses. **NOT PRACTICES, BUSINESSES.**

Within several months, I was off the treadmill of dread, the marketing merry go round and the cash flow roller coaster. In 2006, my firm did hit a million bucks in revenue. By 2007, it did it again, but in that year I dropped my overhead, managed the firm remotely and only went into my office a few days a week at most. In 2008, I sold my law firm so I could focus my attention on helping other lawyers break free of the broken, outdated law business model and implement a new law business model based on what I now call the PFL Way™.

Here’s some of what I learned.

**The Key Importance of Systems** – every successful business is built on a system; a set of business processes that define the way things are done in the company. And, they are done the same way every time. Two of the most instructive books I studied were written by and about Ray Kroc, the creator of the McDonald’s system. Why is it that as legal entrepreneurs, we reinvent the wheel every time there’s a solo or small firm start up? That doesn’t need to happen! Not anymore.

**The Lifetime Value of a Client** – A business that doesn’t understand the potential lifetime value of its clients is broken from the get go. When I heard the concept of the lifetime value of a client, I realized that I’d never calculated the lifetime value of my clients because I couldn’t see beyond the one-time, upfront fee I collected from my clients.

This was just wrong! When I understood the lifetime value of my clients I was able to re-engineer my business model, invest in marketing and provide much greater value to foster their relationship with me over the long run. Now you can too. Trust me, knowing this will change everything.

**Good Enough is Good Enough** – most lawyers are inherently perfectionists with a strong need for control. I sure was! But these tendencies are exactly what has kept our business model stuck in the ice ages and us working overtime year in and year out.
It’s time to be a little more like Steve Jobs, Bill Gates and Jeff Bezos who realize that business requires you to get creative and get into the marketplace even if your final, final, final product isn’t totally ready yet. Your marketplace will tell you what works and what doesn’t so you can tweak, make it better and move from beta to alpha along the way.

What could you put out in beta (meaning it’s not perfect yet) right now that would be of great value to your clients even if it’s not perfect?

**Focus on Your Ideal Client** - I used to believe that I had to take every client who walked through the door to pay my bills or that my ideal client was anyone who needed a Will or was starting a new business.

That belief hurt my bottom line. Instead, I got very clear about who I served best, then set out criteria that had to be met before I would work with a client so I could pre-screen and only work with my ideal clients, everything improved; not only my business, but my life too. My practice took off in a huge way when I stopped marketing to reach everyone and instead narrowed my focus to a select, underserved market. I’ll tell you more about that later on.

**Strive for Simplicity** – one of the best things I ever did was narrow down the options I present to my clients. It’s counter-intuitive, I know. But, too many options are confusing, and my clients are paying me to determine what’s important and what’s not. The most valuable plan is the simplest plan that achieves the objectives and any plan is better than no plan at all. Reframe your services into packages your prospects can easily understand and say yes to.

**The Business of Law is NOT Different** - every business owner says his or her business is different. But really, they are all the same and it’s your job as the business owner to find the similarities so you can discover the nuggets that will translate into big returns in your business.

Or, you can keep reading.

The most important thing I learned was that we’ve got a lot of work to do to change the perception of lawyers out there and that most people have no idea about the value that we provide.

Non-lawyers see us as document drafters selling a commodity that can easily be purchased on the Internet and if we don’t get with it, there’s going to be a whole lot of us out of practice very soon. But not you! Not now that you’ve ready this Manifesto.

*YOUR PRACTICE WILL THRIVE AS A BUSINESS. WE WILL HELP.*
Why You Absolutely Must Understand How to Operate Your Law Practice as a Business

You can shift the rising tide that’s wedged you between a rock and a hard place and is closing in on most solo and small firm law practitioners. You can do it, but you’ve got to start thinking about your business as a business and not as a practice.

More and more lawyers are transitioning into estate and business planning than ever before.

Lawyers who have been extremely successful in the arenas of personal injury, family law, and bankruptcy are realizing that the estate and business planning niche is not only lucrative, but it’s systematizable, the clients are a lot more enjoyable, and it’s complimentary to other practice areas.

Practically every week, I receive several calls from lawyers who are successful in other niches and want to make the transition into serving families and small business owners.

And, as the economy continues to slow, you’ve got more and more law school graduates who are not going to be getting jobs at the big law firms and many of them are going to be ready to jump into serving families and small business owners/entrepreneurs and cherry pick your market.

And if that isn’t enough, you’ve got Suze Orman selling her will and trust kit for only $13.50, LegalZoom capturing more and more market share selling trusts for a couple hundred bucks and even “the Estate Planning Doctor” (estateplanningdr.com) selling an attorney-prepared estate plan online and CorpNet and many others incorporating businesses without a lawyer.

THIS MEANS THERE ARE AN AWFUL LOT OF PEOPLE OUT THERE LOOKING TO EDGE YOU OUT OF PRACTICE!

(And this manifesto will help them to do just that if you choose to ignore what I am sharing here and not at least consider the new law business model I am laying out for you.)

The time is coming when your prospects will conclude that there is no difference between planning with you and buying documents on the internet, if that’s not already happening.
In your heart of hearts if you know that your practice looks a lot like the traditional document focused law practice that is built on a steady stream of new business and marketing to the same old over-65 crowd as everyone else, you will slowly begin to see the value of your services erode [if you haven’t already] and one day you’ll find your marketing no longer works, your engagement rate is dropping and you are being seen as a commodity.

And, if your practice is really “successful,” you’ve built up a huge overhead that you’ve got to feed and it’s close to eating you alive.

**MAYBE THIS IS ALREADY HAPPENING...BUT IT’S NOT TOO LATE FOR YOU TO TURN THE TIDE!**

You still can build a business that is **so differentiated, so personal and targeted to your market** that it makes your business not only **unstoppable**, but also **unshoppable**.

And, you can provide your clients with so much ongoing value that they’ll keep coming back year after year bringing you the fulfillment from your law practice you’ve been craving.

Best of all, you can do it all with a **staffing structure that minimizes your overhead during slow periods and expands to fill the gap during higher volume time periods.** Yes, your law business can **scale based on your needs, rather than you being a slave to it!**

Your prospects will instantly understand that your business is so uniquely suited to serving them that it wouldn’t make sense for them to even try to compare you to documents on the internet or the lawyer down the street.

Your competitors will see that your systems are so set and your clients so happy and you are so firmly entrenched in your market that they couldn’t pry your prospects and clients away from you with a 10-foot, steel crowbar.

And the good news is that you still have time.

**It’s not too late to build a real law business that provides immense value to your clients, gets you off the treadmill and back to loving your work again and cements your clients to you for life,** but I promise you the opportunity won’t last forever.

Now let’s look at a few obstacles that currently stand in your way...
Law Business Roadblocks

Now that you understand the trap that so many law practitioners have gotten themselves into and that you should be focused on building a real business, let’s take a look at the obstacles you might face in actually creating a real business that gives you the freedom you’ve been craving while providing great service to your clients.

There are **two major elements that are missing in just about every law practice – Systems and Management.**

As Michael Gerber so astutely pointed out in the E-Myth, like most business owners (remember all business is the same) **most law practice owners are technicians who have had an entrepreneurial seizure** and decided they could do it better.

The trouble is that our critical lawyer-like nature puts us immediately into the mode of deconstructing every possible system and over-analyzing it to death.

Successful business owners are **able to make quick decisions.** Most lawyers simply can’t.

Successful business owners **put in place a system** and do it the same way every time, time after time after time. Most lawyers get bored with the system or think it doesn’t apply to their business.

And, **most of us aren’t managers** by any means.

**Management requires delegation and letting go.** Most lawyers are control freaks who believe that they can do everything better than anyone else. (By the way, I put myself in this category – and since I became willing to accept this of myself, I’ve been able to recognize it when it’s happening and compensate for it, so if you immediately took offense to that statement, look again – it’s probably true).
As you can probably see, as I did in my law practice, the only real obstacle is you. Fortunately, once you see it, it’s not hard to change.

The successful business owner understands that the business exists to make a healthy profit while providing immense value to clients and providing freedom to the owner.

The successful business owner understands that systems and management are the keys to making that happen and that while reinvention can be exciting, a choice has to be made between exciting and money in the bank.

The successful business owner must invest the time and the energy in his or her own self-awareness, self-growth and personal development to move beyond the thought barriers holding him or her back.

The successful business owner must engage his or her right brain and not just the left. It’s even more important and challenging for us as lawyers, but it’s imperative for our success.

All right, let’s say that I have either convinced you that you need to be an entrepreneur and build a business, or you already knew it.

Now, let’s talk about what else is standing in your way....

WOULD YOU LOVE A SYSTEM THAT GETS YOUR PHONE RINGING ON AUTO-PILOT WITH PROSPECTS YOU LOVE TO SERVE?

CREATE YOUR OWN PERPETUAL MARKETING MACHINE TODAY AND NEVER AGAIN WONDER WHERE YOUR NEXT NEW CLIENT WILL COME FROM.

Below you will see that I’ve identified eight vital areas that make up the traditional law business. All of them equally important, don’t you think?

But we can delve a lot deeper into the reality of the law business, wouldn’t you say? It’s not so simple. We can segment each of these areas into the daily needs of the business – the actual stuff that needs to get done.

Let’s take a look at what each of these activities consists of...
CLIENT ATTRACTION
ACTIVITIES INCLUDE:

Choosing a Niche
Seminars
Retail
Wholesale
Teleseminars
Online Advertising
Offline Advertising
Client Referrals
Rainbroker Referrals
Direct Mail Campaigns
Lead Generation
Word of Mouth
Blogging/Social Media Marketing
Database/Website Management
Lead Management

CLIENT ENGAGEMENT

Intake Conversation
Setting the Appointment
Calendaring
Pre-Meeting Package
Return of Worksheet
Office Setup & Decor
Cancellations
Welcome Sign
Agenda
Perfect Ice-Breaker
Discovery & Education
Fee Schedule & Fee Quoting
Closing the Sale
Plan Design
Fee Agreement
Collecting & Processing Payment
**CLIENT SERVICE**

- Document Drafting
- Document Scanning
- Client Communication
- Funding
- Client-Funding
- Asset Spreadsheets
- Funding Toolkit
- Follow-up Process
- Firm-Funding
- Deeds
- Funding Paperwork
- Information/Data Management
- Family Wealth Legacy Interviews
- Responsive to Client Questions & Issues
- Post-Engagement Survey
- Getting Testimonials
- After Death
- Business Planning

**CLIENT RETENTION**

- Weekly email
- Monthly Newsletter
- Regular Plan Reviews
- Membership Program
- Corporate Updating
- ILIT Maintenance
- Advance Plan Maintenance
- Monthly Calls
MANAGING THE NUMBERS

Merchant accounts
Accounts payable
Budgets
Taxes
Insurance
  • Health
  • E&O
  • Property
Payroll
Accounts receivable
Business Planning
Flash Reports
P&Ls

TEAM ACCOUNTABILITY

Vendor sourcing
Virtual Assistants
Employees
Job Descriptions
Benchmarks
Performance Bonuses
Project Management
Office Management
Team Meetings
Hiring/Firing

YOUR LAW BUSINESS

Managing the Numbers

Client Attraction
Managing the Numbers

Client Engagement

Client Service

Team Accountability

Client Retention

Technology Decisions

Legal Technical Education

Taxes

Health

Property

Accounts Receivable

P & Ls

Merchant Accounts

E & O

Accounts Payable

Payroll

Budgets

Business Planning

Insurance

Flash Reports

Taxes

Health

Property

Accounts Receivable

P & Ls

Merchant Accounts

E & O

Accounts Payable

Payroll

Business Planning

P&Ls

TEAM ACCOUNTABILITY

Client Attraction

Managing the Numbers

Client Engagement

Client Service

Team Accountability

Client Retention

Technology Decisions

Legal Technical Education

Team Meetings

Job Descriptions

Office Management

Vendor Sourcing

Benchmarks

Performance Bonuses

Project Management

Hiring/Firing
And after breaking out all the activities that need to take place in your law business (and by no means is this meant to be exhaustive) you are left with a business model that is quite broken.

If you’re ready to see what our business model really looks like, go ahead and turn the page....

[but make sure you are sitting down!]
Now Isn’t that Insanity?
Frustration, Crazy Busy & Going Nowhere

If you’ve been frustrated with your progress, overwhelmed with the amount of work you need to get done, or just plain tired – is there really any wonder why?

Seriously, even if you were to hire employees and virtual assistants to do it all – don’t you see that you couldn’t even manage all the people that would be required to get all this work done?

And here’s the really crazy part, even though this is the model that most law practice owners are following, do you know what most spend an overwhelming amount of time on?

Searching for more marketing tactics and tricks to bring in the next new client …it’s crazy isn’t it?

Our broken business model requires you to spend more and more time looking for more clients when you can’t even serve the ones you have!

You aren’t even executing your existing marketing campaigns consistently and effectively and you aren’t even serving your existing clients in the way that you want– but you want to spend all of your time on the lookout for the latest and greatest marketing technique or strategy to add to your list of stuff that isn’t going to get done.

Make no mistake: the chart above is the chart of a person who is not only lacking in strategy but also putting themselves at risk of the big “M” and no, I’m not talking marriage, I’m talking MALPRACTICE!

And yet even with the specter of the “Big M” hanging overhead, you can’t stop, can you? The compulsion is for more—more marketing strategies, more education, more training, more tactics.
But MORE is not what you need.

As long as your organizational chart looks like the one below, you’ll always be spinning your wheels wondering why you are not achieving the level of success you’ve always wanted, not to mention putting yourself at a risk of big liability.

Now, before you jump to the conclusion that I am saying the solution to all your problems is to hire more people, know that the problem with your law business goes much deeper than that.

I’ve only gotten to the very tip of this enormous iceberg; if you really want to get at the truth we are going to have to get a lot more personal.

I promise you all hope is not lost. In fact, just the opposite; we are about to enter a time in which the entire law business model is being revolutionized, turned on its head and when you understand what’s possible today you will see that you can have everything you ever dreamed about – a business that serves its clients extraordinarily well, puts lots of money in your pocket, makes a difference in the world and gives you the free time to spend with your family, on your hobbies or even building other businesses.
We Lawyers Must Stop Being Law Practice Copycats

Part of what is contributing to the broken business model is that most lawyers are just copying what they see other, apparently successful lawyers doing. There are two problems with this approach.

The first problem is that often, the copy is based on a surface view of the successful lawyer’s practice, gleaned from listserv postings, website material and brief interactions with the successful lawyer.

The major flaw here is fourfold:

1. The copycat only sees the surface of what the successful lawyer is doing and can’t see behind the scenes to the things that really makes them successful;

2. The copycat doesn’t get any of the benefit of experiencing or learning from mistakes made or roadblocks faced by the successful lawyer, which are critical to the ultimate success of the successful lawyer. When the copycat hits these roadblocks he won’t know what to do to handle them;

3. In many cases, the apparently successful lawyers aren’t really successful at all if you were to look behind the curtain at what their lives are really like; and

4. Very often, if you went back and asked that successful lawyer if they would do it all again the same way if they could start from scratch they’d say heck no, but now they are stuck with what they’ve got, so they make the best of it.

As a result of these four flaws, the copycat ends up building a business they don’t really want, but they aren’t experienced enough to know it and don’t find out until it’s too late!
The second problem is really more insidious because it affects our industry as a whole.

When everyone looks the same, sounds the same and is doing the same thing, we begin to become commodities. And in any industry when you become a commodity, people can only make decisions on the only obvious differentiator...price.

Over time, this has resulted in the proliferation of trust mills, financial advisors and insurance agents edging lawyers out of the estate planning conversation.

You know you deliver so much more than Suze Orman, LegalZoom or the other online services. But if you are just a commodity offering the same form documents as everyone else, the public has no idea.

Take a look at almost any lawyer’s web site (including your own, if you dare) and see if you see something that looks a little bit like this.

Here’s an all too common example of what you are likely to see:

Fortunately, the answer to these problems is not difficult, though it does take a little bit of effort and imagination.
YOU MUST DIFFERENTIATE YOUR BUSINESS.

Now, we’ve all heard the term differentiation before. But, are you doing anything about it? (And no, having family friendly colors or images on your web site does not count!)

So, where do you start?

A great place is with your Unique Selling Proposition aka your USP. Your USP will broadcast to prospects and referral sources why they should do business with you as opposed to any other lawyer and, more importantly, will convey the value of your services over the online, do-it-yourself legal tools.

Here’s what won’t differentiate you – claiming to be all about relationship, when you’re really all about documents and transactions.

It’s something I was doing myself because I didn’t know any better. I thought I was offering relationship, but when I looked around all I saw was the next new client and a whole lot of documents.

By the time I sold my firm, my law business offered so much more, including:

- Plan review every three years
- Kids Protection Planning
- Membership programs providing annual plan review, discounts off future legal needs, referrals to trusted legal experts in other fields, ongoing legal guidance and counsel, updated Family Wealth Inventory, Monthly Audio CDs and more
- Letters to clients’ most important people so family members know just what to do if anything happens to their loved one
- Team-based responsive approach
- Plans that get funded and updated over time
- No hourly fees, ever
- A relationship that made our clients into better parents and business owners
- Family Wealth Legacy Interviews™ to pass on whole Family Wealth, not just money
- A Personal Family Lawyer® for Life

This wasn’t something that happened all at once, but it could only happen once I acknowledged the truth that something was missing. And, that it had to be about more than the documents.
As lawyers, we’ve been trained to think of our time in the context of the billable hour.

**What is your effective hourly rate?**

When I was a brand new associate at a downtown Los Angeles Big Law firm, I was billed out at $285 - $400/hour. Yet, there are some lawyers in my suburban community who have been in practice for 20 plus years and are billing out at only $300/hour or even less.

Is it possible that an hour of my time just out of law school was worth the same amount as those highly experienced lawyers? Probably not.

And yet, when we are dealing in the context of billable hours, trading our time for dollars, we are subject to the supply and demand of the marketplace.

The Big Law firm could bill my time that high because the partners at the law firm were in the $700-800/hour range. (I’ve just recently read that lawyers are breaking the $1000/hour mark at some big law firms). Whereas the suburban lawyers were stuck at the $300/hour mark because there are an abundance of suburban lawyers billing in the $150-$350/hour range.

So, let’s imagine that your hourly rate is $300. And, let’s also imagine that you can somehow manage to bill 6 hours of your time to client matters every day of the week for 5 days and that when you send out your invoices, you collect 100% of what you send out. Even under those most ideal of circumstances, you are capped at bringing in $9,000/week to your business ... and that’s the maximum you can make because you can’t make more hours.

**THE DREAM**

6 HOURS A DAY  5 DAYS A WEEK  @  $300 PER HOUR  =  $9000 PER WEEK

Now, let’s look at this calculation under more realistic circumstances.

If you are a business owner with average to above average time management skills, you may be able to charge 3 hours of time per day to billable client matters, maximum, which would mean your max revenue is now only $4,500 per week and again that’s assuming a 100% collection rate and billing at $300 per hour—all very unlikely.
In reality, if you are billing clients hourly, your collection rate is going to be a lot lower than that. Clients hate getting bills from their lawyer and will do everything they can to slow pay you. Plus, your hourly billings discourage client communication and that means less work for you on an ongoing basis because if they don’t communicate with you, you won’t know about the additional work they need.

**THE REALITY**

3 HOURS A DAY  ×  5 DAYS A WEEK  ×  $300 PER HOUR = $4500 PER WEEK = $90k AFTER EXPENSES

If you think these numbers sound like numbers you could live with, let’s look at what it will cost you to actually make this work. The most efficient law firms operate at a 45% net with most hovering around 30-35% after paying all expenses. That means that if you are bringing in $4,500 a week for 50 weeks of the year (I hope you give yourself at least 2 weeks vacation!) and you are keeping 40% of that after paying your expenses, you are earning about $90,000/year and working your butt off to do it — which happens to be the median salary of lawyers in private practice 6 months after graduation!

Did you really go through 3 years of the Socratic method and law school exams, pass the bar and now busting your tail, taking time away from your family and the things you love to do so that you can make $90,000/year?

That’s far less than most of your clients!

**And what do you have to show for it at the end of the day?** In most cases, nothing you can sell or even retire from. You’ve got to keep doing it, doing it, doing it until you die.

Sure, you can get more efficient, and you can work more hours, but when it comes right down to it ... there are only so many hours in the day and I have a feeling you are already using all of them.

And, hourly billing rewards you for being inefficient and provides no incentive for you to get more effective. Bottom line?

**YOU MUST STOP BILLING HOURLY.**
If you’ve already escaped the billable hour and you are billing clients on a flat fee basis, that’s fantastic. Next, it’s time to start thinking in terms of recurring monthly fees – that’s what will really build the value of your firm.

In the year that I sold my firm, I was bringing in $9,000/mo in recurring fees before I saw a single new client. That was peace of mind and what ultimately made the sale of the firm possible.

The next step is to stop doing work that can be handled by a $12/hour employee because you think it’s just easier or faster to do it yourself. Think of it this way ... if you are doing $12/hour work, you are making $24,000 per year. Aren’t you worth more than that? Time wasters are stealing your life and the freedom you’ve been craving. More on that next ...
Time Wasters That are Costing You a Lot of Money & Causing You a Lot of Stress With No Return on Your Investment

Let’s start with the first time waster that’s costing you your life … and is SUPER EASY for you to eliminate right away.

#1 You Must Stop Answering the Phone.

I am totally serious about this too. If you are serious about getting control over your life and your business, you must be ruthless about this #1 rule. From this day forward, commit to yourself to never take another call from your office unless it is scheduled in advance.

It’s a very straightforward rule and will be easy to get your team members to understand and put in place right away. There’s no special training or software necessary.

All you need to do is call your receptionist, assistant or client services director right now and tell him or her this:

From now on, I won’t be taking unscheduled calls from anyone. When someone calls for me, please let them know that I am meeting with a client and see if you can help them so they don’t have to wait to talk with me. If you can’t, let them know you’d be happy to schedule a call with me to make sure they connect with me because if it’s not calendared, a long game of phone tag could ensue, causing severe frustration.

Then, give whoever handles your calendar specific times each day or each week that you will return calls.

The only exception to this rule is that you will take a call directly only if it is of such importance that it would have been acceptable to interrupt you to take the call if you were meeting with clients.

Otherwise, ALL PHONE CALLS GET SCHEDULED.
This one thing will massively reduce your stress and help you get control of your time.

And if you are thinking your clients won’t like it or you will lose clients as a result, you are wrong. That’s your mind playing tricks on you.

The truth of the matter is that your clients will love it because you will let them know in advance that this is what will support you to be responsive to them. They can get quick questions answered by your team and they can schedule time to talk with you about legal or strategic issues, and eliminate the phone tag, thereby saving them time & a whole lot of frustration.

And if you think it will turn off your prospects and you’ll engage fewer clients, you are wrong. When you value your time, so will your prospects and they will want you more than ever.

Not having a set schedule is a massive timewaster and stress producer.

You must have a set schedule. I acknowledge that it’s hard to do. My number one value is freedom and it was difficult for me to accept that I had to fit myself into a rigid schedule and yet once I overcame the mind block I had about it … I had more freedom than I had ever dreamed possible. It will work this way for you too.
Here’s what you do:

- **Pick 2 days per week that you will meet with new clients and do client work.** Period. Let your Client Services Director know what those are and tell her never to schedule your client meetings on other days, unless it’s an emergency type situation and she checks with you first.

- **Pick another day each week that will be Law Business day** and you will spend time strategizing, planning, and creating/implementing systems that will free up your buffer days as time goes by.

- **The remaining two days can be buffer days/marketing days that will eventually become free days** as you begin to put your marketing on autopilot and eliminate more and more of the unnecessary work that you are doing on those days that can be handled by someone else.

Be **ruthless about your schedule**. I promise you, if you are, you will see vast improvement in your time and your energy.

In fact, **don’t believe a word I am saying about this** … just test it out and see how it works for you.

A word of caution: when I start testing something new, I often run into some immediate roadblocks. That’s the Universe’s way of testing me to see if I’m serious or not. You must push through the immediate roadblocks … **persistence gets rewarded handsomely.**

STOP Doing These Things:

- Networking your own computer system
- Surfing the internet
- Constantly checking email
- Drafting your own documents
- Building your own website
- Coordinating your own insurance coverage
- Reading discussion forums
- Reading your own insurance

Ready for a few more?
What?!?

Okay, maybe not right away, but soon, you will want to stop going into your office.

When I first heard about this, I thought, “no way could I ever do that!” But, 3 years later, I can assure you, it’s the best decision I ever made.

You see, as long as I was in the office, no one could seem to do anything without asking me a million questions about it.

**Now that I’m not there, they figure it out.**

Sure, sometimes they make mistakes, but that’s how people learn. If I were constantly there to save my team from their mistakes, they’d always rely on me.

Here are a few other things you absolutely should not be doing:

- Constantly checking email
- Surfing the internet
- Reading discussion forums (unless they are helping you get more business or be a better lawyer)
- Building your own website
- Drafting your own documents
- Networking your own computer system
- Coordinating your own insurance coverage
The 3 Fundamentals That Will Put More Profits in Your Pocket

Here’s how you can spend as much of your productive time as possible on activities that generate the revenue you need to make the money you want.

The three secrets to making this happen are Team, Systems and Tracking. If you’ve got a team in place, the systems to train your team and the tracking to ensure the systems are working, your potential is unlimited. It will be a piece of cake to attain your number and easily surpass it.

By having a team in place, you can offload those things that can be done at a lower hourly rate by someone else (and oftentimes far better than you do them too!). It’s called leverage and it’s the secret of the Big Law firms. To have the kind of life and business you want, you must apply it in your business too.

**ANSWER THESE 3 QUESTIONS NOW ...**

1. What is the next hire you need to make to free you up and leverage your time?
2. What system most needs work in your office next?
3. What are the key metrics you need to be tracking in your office?

Not sure? Read on ...
What you don’t want to do though is end up with an over inflated fixed overhead like I did. If you recall from Part 1 of the Manifesto, at one point my overhead ballooned to $70,000 per month.

I had a sick feeling in my stomach constantly. And several well-known, respected lawyers I know have overheads in excess of $1,000,000 per year! I can’t even imagine the angst that comes along with that big of a nut.

And, when my overhead was that big, my team became very difficult, if not impossible, to manage.

Talk about office politics?!? I never imagined that my office would be the scene of dramas along the lines of the very best soap opera you can imagine. But, it was.

I even had to go so far as to hire consultants who could help my team communicate with each other. That ate up several thousand dollars!

And for what? So my employees could fingerpoint, place blame, shirk responsibility, say they were too busy, make excuses … and frankly, it was entirely my fault.

I didn’t have any experience managing employees. Before law school, I was a waitress. I’d never had anyone work for me before. And, the Big Law firm certainly didn’t train me. They’d never even given me the training to best utilize the assistant they assigned to me.

So, the more things didn’t get done, the more people I threw at the problem until one day I realized there were a lot of unnecessary people drawing paychecks out of my pocket and no one was accountable for anything at all!

I tried a thousand ways from Sunday to get a clue on what the heck everyone was doing all day.

I asked them to keep daily time logs, weekly time reports, call logs, notes in the file, you name it, I was trying to track it. But then, I’d get all this information and have no idea how to use it to tell if anyone was doing what they were supposed to be doing and if the work was getting done.

Many times I wanted to throw in the towel because I thought I’d never be able to corral all the employees to get the work done, get it done right, and meet my standards for responsiveness to our clients.
That all changed when I figured out what I'd been missing.

You see, I was working with a bunch of people who had employee mindsets. The employee mindset is not focused on taking responsibility, but instead on taking direction.

The employee mindset is not focused on efficiency, but on killing time. The employee mindset is not focused on “how can I”, it’s focused on why this can’t work.

I realized I needed to get my team out of the employee mindset and into the business owner mindset. I did that in two ways.

1. In some cases, I had to have employees, but I restructured so that the only employees were the team members that I had to have on-site and in-person to work with clients in the office.

2. Wherever I could, I outsourced what was previously handled by an on-site employee to a Virtual Assistant who owns his or her own business.

The first thing accomplished by this shift to outsourced work is it reduced the drama in my office in mega doses. Now, with only 2 employees, they work as a team focused on getting the job done and supporting each other in doing what needs to be done.

The second thing was, it reduced my fixed overhead. So, if I decided to go on vacation one month and bring in less than $70,000, my costs would scale down and if I decided to get busy, do a lot of marketing campaigns and ramp up, my costs would scale up. Financially, I was in control again, finally!

Now, my business could scale – scale up when I needed it to and scale down when I wanted it to.

But, even though I was in control financially, I still didn’t have a sense of whether the work was getting done inside my office, whether my outsource team was on track, and now that became even more important because the outsource team members weren’t sitting right next to me where I could keep an eye on things. This is where your numbers come in.
Now that I got a handle on my team, it became essential for me to start tracking my numbers.

I always had a sense that there were reports I should be getting that would let me know at a glance what my team members were doing and how we were doing financially, but I didn’t know what those reports were or who should be providing them to me.

On the team side, I ended up micro-managing and yet feeling constantly frustrated and out of control because while my team felt as if I was always looking over their shoulder. The truth was I felt out of control and I was trying to grasp at anything for answers.

On the financial side, I had a gnawing feeling that I should be doing something, but wasn’t. I was bringing in so much money that it covered the fact that I was losing a lot of money by not paying attention. My bookkeeper and my CPA weren’t talking on a regular basis. I wasn’t getting any kind of regular reporting.

I got three wake up calls that forced me to get these things under control –

1. I found out that one of my key employees had put me at serious risk of a malpractice lawsuit;
2. I got an unexpected 6-figure tax bill that I had to take out a loan to cover;
3. I got audited by the IRS.

The Universe was sending me a major sign that I needed to start paying attention to the numbers. It wasn’t enough just to focus on my clients; I needed to start focusing on my business or I wasn’t going to stay in business.

**WHAT NUMBERS ARE YOU TRACKING?**
Most of you know you need **systems in your business**, but have **no idea how to actually create them and stick to them**. I spent years wasting my time and energy expecting my staff to create systems. Over and over again I would tell my staff – write down your process for doing what you do more than once. They would look at me as if I was from another planet.

Finally, I got a clue and accepted that creating systems was not something as simple as just telling someone to write down what they do whenever they do something more than once ... creating systems is actually a high level skill set.

I gave in and hired a consultant. And then, **consultant after consultant after consultant** ... until I finally determined that no consultant would ever know my business as well as I do and to create my business systems the right way, I’d have to just buckle down and do it myself.

This didn’t come naturally to me; **it was a skill I had to learn**, but the time invested in learning it has paid huge dividends.

Here’s a shortcut for you ...
The 6 Critical Law Business Systems

I’ve distilled all the systems necessary to have the law business that will get you back to being the lawyer you want to be into 6 critical systems every law business must have.

I don’t have the space here to go into depth on each one, but I will share enough to get you started and to give you insights into some things that took me years to figure out and then at the end of the Manifesto I’ll let you know how you can get our help in creating your systems so we don’t leave you hanging. Ok?

Before I do though, let me say one thing that was most difficult for me to overcome when I was first considering the idea of systems in my business because it might be keeping you stuck too.

I thought that putting systems in place would make things too rigid and inflexible. For example, if I created a system around my calendar and when I’d see clients and take phone calls and do client work that I’d be restricted by those commitments.

Freedom is my highest value. I didn’t want to give any of it up.

Here’s the paradox though – putting systems in place will give you more freedom than you’ve ever thought possible. Yes, surrender to the systems. They hold the keys to the business of your dreams.

There was also a part of me that believed that somehow systems would remove the “personal relationship” that was so important to me to have with my clients.

Let’s take a look at each of the systems individually and how they will apply in your business.

CLIENT ATTRACTION

When I started out in practice, my system for client attraction was based on the hope and pray model. It didn’t work out very well. I’d go and speak at an event and then have no system for following up with the leads I got afterwards.

I’m embarrassed to tell you how many leads I lost because I had no way to keep track of the people I met.

Earlier I described the marketing roller coaster I was on because of my client attraction systems – do an event, get busy with clients, stop marketing, realize I had no clients scheduled, do an event, get busy with clients – it was making me nauseous, to say the least!
I needed to come up with a regular, consistent flow of prospects into my office so I could get off the roller coaster.

One thing that was holding me back was my belief that I had to market my practice broadly so as to attract every person in my area who needed estate planning.

Big mistake!

I had heard over and over again that it was important for me to get clear on my ideal practice and to niche my practice and target my marketing. But, I was scared to do it.

I feared that if I focused on a niche, I would turn off all the rest of the people I wasn’t focusing my marketing on.

Finally, I accepted that this was lack mentality and decided to just go for it.

I rebranded everything and focused on my target market – young wealth builders in the South Bay area of Los Angeles.

Don’t get me wrong – this was hard to do. I was scared there wouldn’t be enough; I was limiting myself too much; I was going to starve – you know the drill, right?!?

The results were unbelievable!

Suddenly, more people were calling than ever before. Not only young wealth builders, but their very wealthy parents. Business owners, elderly people. They all wanted in!

Here’s one very important tip for you if you are ready to try this for yourself.

The Universe will test you.

Let’s say you handle a little estate planning, a little corporate work and a little litigation and you make the decision that you are going to focus only on estate planning for young wealth builders going forward.

I can assure you that you will get tested by a phone call with a litigation case that looks great, pays well and appears as if it won’t require a huge investment of your time.

ARE YOU READY TO GET OFF THE MARKETING MERRY-GO-ROUND?!?

Visit www.lawbusinessmarketingmachine.com and register for our next FREE call to discover how you can set up your marketing systems to work while you rest!
It's a test, **don't fall for it.** If you do, you’ll get more of the same and never have the life you want. This happened to me. As soon as I made the decision to not take on another conflict matter, I got a call from a woman whose grandmother wanted to hire me to restate her estate plan and make sure everything was in order for the eventual administration of the estate. It was a $100,000,000 estate. The family was warring on both sides. They offered to pay me $10,000 per month. **I didn’t stick to my guns and I took it.**

That decision, made just for the money, cost me months of progress and far more time than it would have taken me to just engage and service 2 additional young wealth builder families at $5,000 for each plan. **Don’t make the same mistake I did.** Get clear about what you want in your life, understand that there is more than enough for you, and stick to your red velvet rope policy.

Once I narrowed the focus of my marketing to reach the young wealth builders in my community, my marketing became supercharged and I was able to create a system to implement five key marketing strategies every month, on auto-pilot.

1. **Send out a weekly e-zine every Thursday** to people who have opted in to my list.
2. **Send a monthly newsletter by mail** to existing prospects, clients and referral sources.
3. **Send a monthly postcard** to a tightly targeted mailing list of leads that results in at least 5 highly qualified appointments with prospects ready to engage, from this one strategy alone.
4. **Place a highly targeted, highly responsive ad in two ideally targeted magazines** and several newsletters that have a great response rate, don’t cost me that much money and lead to at least 2-3 appointments every month.
5. **Host a monthly teleseminar** directly targeted to my niche market.

What this means is that each and every month I’ve got **at least 10 ideal clients walking in my door ready to engage** without me having to do much at all.

Periodically, I would add in-person speaking events and other high leverage activities and the rest of my marketing would continue in the background, filling my pipeline and acting as a perpetual marketing machine for me.

**To this day, 3 years after selling my practice and not marketing one bit, I STILL get phone calls and emails from new prospects who want to meet with me.**

That’s what systems are all about.
CLIENT ENGAGEMENT

A system of attracting the right clients for you is great, but it won’t get you anywhere if you can’t engage the prospects who call you.

The way I see it, you have a moral obligation to help your prospects say yes to working with you.

If someone calls you and needs your service and walks out without moving forward because they were confused, had to think about it, or were uncertain, you failed them because the chances are they will never work with you.

My client engagement rate used to be a dismal 50%. Today, most of the lawyers I have trained have near 100% engagement rates, as mine was when I stopped practicing.

Here are the basic components of the system:

- My Client Services Director follows a script when she picks up the phone to talk with the prospect that predisposes the prospect to working with us and ensures they will make their appointment, keep their appointment and return their pre-meeting homework to us before their appointment.

- We send out a pre-meeting package designed to convey the importance of the meeting and that ensures we get as much information back as possible before the meeting.

- Our office is decorated in such a way that the prospects are primed to work with us from the minute they walk in the door because they feel welcome, cared for, and relaxed.

- And, I follow the same script every single time I sit down with prospects, which has been refined, reworked, and honed over hundreds of initial consultation meetings to be exactly what prospects need to hear from me to feel confident that they need to plan and that they need to plan with our office. Universally after my initial meetings with prospects I hear from them how comfortable and easy the whole process was and how relieved they feel that they are working with us and getting things taken care of.

I can also tell you this – during every single client meeting, my mind tries to make me veer off script. It tells me that this time, I don’t have to do it. If I give into that (rarely), the clients get confused and may leave without engaging my firm and going forward with their planning.

LEARN THE REST: www.ClientEngagementSystem.com
If that happens, I’ve done a disservice to the prospects because to them, the script is not the same old script. It’s a new experience for each new family sitting across from me and they each deserve to experience the whole process as if they were the first ones hearing it.

Stick to the script and engage more clients.

**CLIENT SERVICE**

None of this means anything if you can’t get the work done in such a way that your clients become raving fans who can’t wait to tell all their friends, family and colleagues about the experience with your firm.

One of our early Personal Family Lawyers® Thea Eliot shared with me that planning with her office became the “it” thing for families in her community ... almost a status symbol. She’s even been recommended on Yelp.com. That’s what you want too.

**Excellent client service begins and ends with a tightly run system** for moving your clients through the process so they stay informed, confident about you and your process, and don’t feel as if they’ve fallen off into a black hole after they’ve left your office.

**Clients get a pre-crafted series of emails at each key point in their engagement** starting the day after they engage our office. This happens on **auto-pilot** so you can focus on money-making activities, not the tickler file of to-dos.

They receive a confirmation of their key decisions and a preliminary Family Wealth Inventory (Asset Spreadsheet) two weeks after leaving our office.

The clients are back in your office 4-5 weeks after their initial meeting, their signing appointment is scheduled immediately after their initial meeting, so there’s no risk of them not signing their docs.

You make sure their trust is funded – mission-critical for your firm. You cannot prepare an estate plan for someone without either funding it yourself or having an accountability system to make sure they fund it.

You scan their completed signed plan, make a CD of all documents both for your fireproof safe and for the clients’, and deliver their original documents back to them at a final meeting.

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**LEARN TO DO BUSINESS THE PFL WAY™**

To learn how to be the “it” lawyer for families in your community

www.personalfamilylawyer.com
In my firm, we used to send the binder or try to give it to them at the signing meeting, but the process just felt like it ended so abruptly with no continuation.

Now, your final meeting could possibly be the most important!

**The final meeting is where the relationship happens.** You send letters to everyone named in their documents letting them know what to do if anything happens to their loved one. You review the Kids Protection Plan and who gets what. You ensure their assets have been moved into their trust. You have their first Family Wealth Legacy Interview™ to pass on not just their financial wealth, but their whole Family Wealth and you enroll them in your Family Wealth VIP Membership program.

And that’s just what happens during their time with you; you will have a process for what happens after they complete the planning process and for years to come that bonds them to working with you because they love the service and makes it so that they refer you to all of their friends and family.

The same sort of system happens for your business planning clients who stop seeing you as the lawyer who drafted their legal documents and instead as a trusted advisor who cares about them and their business.

That’s how we did client service in my firm. The more systems you have on automated or on auto-pilot without you doing any of it, the more likely it will actually happen.

**CLIENT RETENTION**

The fourth and possibly **most important of all the systems** is your Client Retention System.

Client retention is about **keeping your clients for life**, helping them to see you as the family’s trusted advisor, the person to turn to whenever new assets are acquired, babies are born, family members die, car accidents happen, foreclosures are at risk, businesses are started...you get the picture.

And, it’s not because you are going to handle their next personal injury. It’s because you are going to lead your clients to the right referral resources who can.
You are going to be seen in a whole different light when your clients know they can call you anytime and not have to worry about getting a bill in the mail a few weeks later.

You will love having a real lifetime relationship with your clients; a relationship in which you really make a difference in your client’s lives; a relationship in which you are well-compensated and valued; a relationship in which you can get off the marketing merry-go-round, go on vacation, and have a life yourself.

As a result of your Client Retention System, you will handle more lucrative administration cases, you will do more follow up on legal work for your clients, their family members, and their business partners. It’s the ultimate win/win/win situation.

TEAM ACCOUNTABILITY

None of this is possible without a strong team in place that is accountable, responsible and responsive. That will not happen by itself. You must provide the system for your team to be accountable within.

I spent years expecting my team to create the system – that’s sheer insanity. It won’t happen. You have to do it.

The system includes measurable objectives – called benchmarks – for each team member to meet and when they do, they are financially compensated for reaching that benchmark.

As an example, I can assure you that you will no longer have a significant problem with document errors if 20% of your outsource drafting coordinator’s compensation comes from bonuses that are given based on accuracy in the documents.

Benchmarks must be:

- Attainable
- Measurable
- Sustainable
- Clear

And, of course your incentive programs must comply with your State Ethics rules (remember the rules about fee sharing?).
Job descriptions shouldn’t be the long narratives they used to be; they are should be short descriptions that clarify the bottom line job for each team member and the performance benchmarks they need to hit. Your team members want to be successful; this is how you help them to be.

Accountability means using these job description templates to schedule monthly, or at least quarterly, reviews with each team member.

MANAGING BY THE NUMBERS

The purpose of any business is to make a profit for its owner – that’s you. And yet, we often lose sight of this fact because we want to help people and do good. Fortunately, you can do very well doing good. And, you deserve to be well compensated for the service, relationship and guidance you provide to your clients and their loved ones.

But, if you are not watching your numbers, by the percentage point, or as you get more adept, by the .01%, you are losing money right now.

I was there, I know.

The answer has been to create a 1, 3 or 5-year pro forma business model. Pro forma meaning, just get something in place though it won’t reflect where you are actually going, it will get you there faster.

Don’t ask me how this works because I can’t explain it, but when you have a financial model that tracks budget v. actual, cash flow, revenue, expenses, etc., you’ll be able to begin to manage by your numbers.

But, that’s not enough, you should also review a weekly flash report that tells you at a glance whether you are on track to hit your monthly and annual goals so that, if not, you can immediately course correct. The faster you are able to course correct, the more successful you will be.
A QUICK RECAP OF LAW BUSINESS BUILDING PRINCIPLES

Has this gotten you thinking about your business as a business yet? My goal is to help you to the freedom, money, and fulfillment of your dreams.

Here’s a quick summary of the Law Business Building Principles:

- **Today is the day you stop thinking about your business as a practice and start thinking like a businessperson.** You create a vision for your business and take into account the variables that you will need in place to get you there…realistically.

- **You understand that the current marketing merry-go-round is leading you to the treadmill of dread** and make it your priority to get off and create a meaningful business that gives you the freedom and fulfillment you deserve.

- **Stop being a law practice copycat** and make your business uniquely stand-out in your community

- **Ruthlessly cut out the time wasters** that are sucking the life out of you and your business.

- **Stop billing time hourly** and move everything to a flat fee structure, in which you are rewarded for efficiency and innovation.

- **Put in place the three keys to your success** – team, systems, and tracking.

- **Outsource wherever you can** and **know the performance benchmarks** that tell you your team is on-track, at a single glance.

- **Laser-focus your client attraction to a single niche and expand from there.** There is still time for you to enter into a seriously underserved target market niche of young wealth builders. You can (and should) build your business around these young wealth builders and get very wealthy yourself, but it’s not going to last that much longer … eventually it will be as saturated as other target areas. You can be at the forefront or chasing the rest of the crowd.

- **Systematize your client engagement and your client service** so everyone who calls you and needs you says yes and gets unparalleled service with the help of a highly automated service system that you can put on auto-pilot.

- **Become the lawyer your clients turn to throughout life** – at every stage, before making any decision, and get back to the real reason you became a lawyer.
BRING REAL RELATIONSHIP INTO YOUR BUSINESS

If you heed the call I’ve laid out in this Manifesto, you will no longer be a mere document salesman selling Wills and Trusts or Corporations, you will become the trusted advisor for your client families and you’ll be making a real difference in the world.

You will be on your way to breaking free of the outdated, broken business model that’s holding you back from having the freedom, income and fulfillment you deserve.

BE THE LAWYER YOU WENT TO LAW SCHOOL TO BE, HELP MORE CLIENTS AND KEEP MORE MONEY

If you liked what you read in this Manifesto, I bet you are ready to make some changes in your own law practice so you can start to create a successful LAW BUSINESS instead.

Here are some of the ways we can help:

- Learn how to add $3,000 to $5,000 per month or more to your bottom line each and every month doing legal work that 90% of the people you know not only need, but want by checking out our video series at http://www.NewLawBusinessModel.com or on our call with Martha Hartney in the Business, Love + Money for Lawyers Telesummit Series at http://www.BusinessLoveandMoneyforLawyers.com

- If you love what you do already and just want more prospects and clients to do it with, join our next program and create your own Perpetual Marketing Machine. You can do that at http://www.LawBusinessMarketingMachine.com

- If you love what you do and your phone is ringing, but you are not engaging as many clients as you’d like, still charging hourly for your services and would like to raise your fees, you’ll want our Client Engagement System. Join us for our next training at http://www.ClientEngagementSystem.com

- Serving families and small business owners and ready to do things the PFL Way™? Email to support@newlawbusinessmodel.com asking for more information.
ONE MORE THING ... PROBABLY THE MOST IMPORTANT

How could it be that I’d release all of these things to you?

**Aren’t I afraid that you’ll steal them** and use them to take business from me or my Personal Family Lawyers?

Not a bit. **I don’t believe in the concept of competition at all.**

This is one of the single most important lessons I learned over my years learning from the smartest business owners in the world.

As a lawyer, I had been taught to look for all the reasons things wouldn’t work, to look for the flaws and to **protect my clients from being taken advantage of or having their ideas stolen from them.** (I know one lawyer who is convinced that every other successful lawyer out there stole his best ideas and that’s the reason for their success.)

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**LAWYER THINKING**

"I’m not getting what I deserve"

"they stole my idea and now I can’t pursue it or it hurts me in some way"

"this won’t work for all these reasons..."

"there’s not enough and everyone has to get everything they can"

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**ENTREPRENEUR THINKING**

"I appreciate everything coming into my life and look forward to more"

"that person had the same idea I did; maybe we can collaborate & create something even more amazing"

"this idea has great potential, let’s see how we can make it work"

"there’s plenty for everyone & working together creates a bigger pie to share"
As a business owner, I discovered it was that kind of “lawyer thinking” that held me back from my own success more than anything else. I discovered I could be a great lawyer and at the same time, I could start to think like the most successful entrepreneurs in the world. Here are some mind-shifts to get you started:

- Forget about competition and think collaboration instead – there’s really no such thing as competition anyway.

- See the abundance in everything, there is no lack anywhere you look – there’s more than enough.

- Instead of asking how could it fail, ask how could it work – everything has potential.

- Look for success and things that are going well, instead of what’s going wrong

Out of everything I’ve written here, this last section may be the most important of them all. If it seems like you are doing everything you possibly can and still not getting ahead, take a look at your thinking and consider whether you are thinking too much like a lawyer and make these adjustments. You’ll be amazed at the results.

TO YOUR NEW LAW BUSINESS MODEL,

Alexis Neely
PS – Over the years, I’ve gotten a lot of bad mouthing from fellow lawyers who simply don’t like me talking about the truths I’ve laid out in this manifesto. There is actually a group of lawyers who are attempting to block me from getting other lawyers to email this manifesto out. I really don’t want to see that happen, because it will mean many lawyers will just continue down the path of the treadmill of dread simply because they don’t know there is an alternative. But there is! Join one of our programs and discover what I mean – your life is about to get a whole lot better.

WELCOME ...

**Linda Sherfy.** Thanks to Alexis, I met with a couple last night that gladly paid $4000 + $1000 (kids asset protection option). They had seen the FWPI web site and wife read the Wear Clean Underwear book. They called me to schedule an appointment. The national marketing is working. I give Alexis my unqualified highest endorsement.

Everything she does is top quality, and I’m 100% sold on the PFL system and the philosophies of the Family Wealth Planning Institute. And, because of that, I’ve been able to triple my fees without feeling guilty because I feel that I’m offering my clients better then any other estate planning attorney in this area by far.

**Robert Galliano.** I ignored Alexis’ emails for months. Quite frankly, I was very skeptical about her claims. After 25 years practicing law, I thought she wouldn’t be able to teach me anything. I was wrong. Within a few months of working with Alexis, I’ve increased my fees 1000% (that is not a typo—one thousand percent), and I recently engaged 7 out of 7 new prospects at $4,000 each. The best part is I’m energized and love my business again. I sure wish I would have opened her emails sooner.
Midway through 2012, it became my job to review Alexis’ Law Business Manifesto in preparation for a re-launch of a new brand. It had been written four years ago and needed a fresh pair of eyes—I was elected, new lawyer that I am.

As I read it and re-read it, I realized that, aside from the occasional punctuation change I’d make, the meat of the text is even MORE, relevant and compelling today than it was when Alexis first wrote it.

Alexis and I were friends long before I became a lawyer—eleven years before to be precise.

In fact, it was an offhand remark she made to me long ago that put the cockamamie idea in my head to become a lawyer in the first place.

When I finished school and passed the bar, she persuaded me to try out becoming a Personal Family Lawyer®, despite some big resistance on my part.

The short story is this—I decided to give it a try and and my goal, in addition to serving families deeply and fully, was to figure out if Alexis’ systems actually worked the way she said.

I was skeptical. Yes, very skeptical of my best friend’s most successful products. I didn’t think the information she had amassed could really be that helpful in building a business. I thought I would succeed because of my personal abilities and my commitment to being a legal entrepreneur.

**I WAS DEAD WRONG.**

Her systems not only worked, they were the main reason I was able to build a business so quickly. Had it not been for all the systems, tools, and inspiration available in her Personal Family Lawyer® and her Creative Business Lawyer™ programs, I’d have given up in short order.

Because it’s HARD. It’s really, really hard to build your own business. But without excellent service and systems, engagement skills, sales skills that aren’t sales-y, and a focused intent, it’s darn near IMPOSSIBLE.

No one teaches lawyers how to be business people. Law schools don’t do it, because law professors don’t know how—God love you all—you still don’t know how to do it. Law firms don’t do it either—in large part because even our own business model is crumbling before our eyes.
During the five years since Alexis began the Personal Family Lawyer® program, the face of the legal industry has changed radically. Big Law has stagnated if not completely fallen apart.

My colleagues in Big Law tell me that they’re no longer hiring new associates. Law school classmates who counted on jobs in Big Law—hired as summer associates in between 2nd and 3rd year—imagined they had it made! But in the year that followed, Big Law sent one letter after another to each of these high achievers letting them know that they their start dates would be postponed, first for six months, then for one year, then indefinitely. The students who worked SO HARD to be in the top 10% had no work and no Plan B.

A couple years later, most have found work, but not in the $120,000-a-year jobs they struggled so hard to secure. Despite the statistics that say 90% of University of Denver graduates had found employment, we know that it wasn’t employment in Big Law. Some went into government work, some into non-legal jobs, some into their own practice—unprepared, undefined, and scared out of their wits.

Big Law stopped hiring new associates.

Almost all new hires are “lateral,” lawyers with 3-5 years of experience that don’t need to be trained. That’s due in part because clients have decided they’re no longer willing to pay exorbitant hourly rates for new associates who are too wet behind the ears to make valuable contributions. Some have even put clauses in their engagement contracts limiting the billable hours or rates of new associates or even prohibiting new associates from working on their cases.

Law firms have also assessed the amount they have to invest in every new lawyer to get them up to speed, and they’ve determined they’re no longer willing to pay that price when so many laterals are available (and they are!).

It’s a losing proposition in a legal economy that is becoming more competitive, lean, and under greater scrutiny over its inefficiencies and inequities.

In Denver, where I live and went to law school, we admit about 750 new lawyers each October—not counting the out-of-state applicants. Of those, 60% were not employed. And there were approximately 35 big law firm jobs to go around. 35!!!

What the heck are all these new lawyers doing?

You’re looking for government jobs. You’re staying in the jobs you had before and through law school. You’re even working at Starbucks.
One young man I went to school with got a gig as “Captain Morgan” the pirate—the guy who flirts with all the girls in resort bars après ski. Okay—well he might have wanted that job even if a legal position had been available.

Several enterprising classmates have launched online businesses. One launched a medical marijuana review site where partakers can offer their thoughts on particular varieties of pot!

Many have given up on a legal “career” altogether. And a few brazenly hung out their shingle. And some have already done that, given up, and started looking for alternate work.

Big Law was never an option for me. I have too much going on to give 70-80 hours a week to a law firm. I have two sons, two stepsons, a husband, a home, a community—all of which depend on my continued presence. I also believe that we need balance to be happy and I didn’t want to subject myself and my family to the traumas and terrors of criminal or domestic violence law. I’d already had one death threat from a parent as a result of my work as a guardian ad litem. I had to figure out how to lawyer in a positive and life-giving way that would provide for my family.

My only real option was to go into private practice immediately.

But how? How would I get started? Should I be a general practitioner or a specialist? How would I learn what I needed to know? How would I fund it? How would I find my first client? My second? My third?

I went in search of a mentor. I met with lawyer after lawyer.

No one was willing to help me the way I needed help. No attorney in active practice offered to guide me, teach me, grow with me. Why? Because they would be training their own competition and in a world of perceived finite resources, that’s suicide.

But, ya’ know, I’m glad no one did! I’ve discovered how truly out of touch the legal profession is in business building. One law firm after another has been dissolving, cutting back, laying off, and experiencing the pinch of the current economic crisis. As I met with more attorneys, attended CLE after CLE (racking up a whopping 95 accredited CLE hours, not including the countless hours not accredited), I realized that, as awesome they are at the technical/legal aspects of their profession, none of the people I met could teach me what I needed to know—how to build a focused, systematized business with revenue I can both predict and control.

That’s when Alexis and her programs began to make a lot of sense for me. I finally became willing to hear what she had been trying to tell me (and I had been ignoring).

And then it was ON.
Two years into my journey, I’m shaking my head at the impossibility of what has unfolded.

I’m not all the way where I want to be, quite yet. But I no longer worry that I’ll get there. Since I began, I’ve implemented most of what Alexis has written in this Manifesto. Now, picture me jumping up and down, shouting, “It works! It works!”

Honestly, I resist the word “Manifesto” because it has so many negative connotations. But the definition of the word says, “a declaration of a set of beliefs and intentions.” As a declaration of freedom from a business model that no longer works, this text has as much relevance or more today than when it was written four years ago.

I couldn’t edit this down. There was very little I could cut without impacting the importance of each concept. There were no glaring errors to fix—aside from a couple punctuation marks.

All I could do was add this afterword to confirm for you that what she says here is still the way she says it is. From the heart, I believe she’s right.

I’d add one thing though.

We have an obligation to practice law better. As lawyers, we have to fix the system that no longer works to serve everyone. We need to have the courage to listen to the people who’ve gone before and take what works, and leave the rest. We must apply the principles of the best businesses out there to a profession that holds itself “above” others and apply sound practices that can sustain us, serve our communities, and, yes, question authority.

Welcome to a new way of practicing law. Welcome to the New Law Business Model.