Ernie Svenson: Hey everyone and welcome to another episode of *Law Firm Autopilot*, a podcast for lawyers who want to create better practices by using technology. As I said the last time, the key to using technology is to do so sensibly and strategically. Too often, lawyers struggle with technology. As I said the last time, the main reason for that is something fundamental, something that has little to do with technology or the skills in using it. The main problem is that most lawyers don't have a clear blueprint of what it takes to create a successful practice much less where technology fits into that blueprint. Today, we're going to talk about what that blueprint is.

Basically, if you want to create a successful law practice, there are three components, three overarching areas. One is the foundation. That is understanding what it takes to create a successful practice. What the blueprint looks like, things like that. Then looking at the profit part of the equation, how are you going to get good clients? How are you going to do this in a steady way, so that you get these great clients in a steady flow that's manageable for you but not overwhelming, because you get too many of them at once and that you get good clients? So, the profit engine part is part number two.

Third is the operations, which is the big picture of how you service those clients and do so in a high-level way. With the foundation part of the equation, there are three subcomponents. With the foundation, you have to look at what is your vision for your law firm. What kind of law firm do you want to have? What does that look like? What does success look like for you? Because it's going to be different for you than it is for somebody else even if they practice in the same exact area as you do. Even if it's somebody whose practice you aspire to have. There are things about your practice and your vision of it that are going to be different. So you need to spend some time drilling into that.

The next part of the foundational equation is the success plan. What does success look like in terms of actual metrics? Things that you can measure, how many clients are you getting per month? How much money do you need to make? You need to map these all out and have a success plan. Then from there, you need guidance in implementing and keeping that progress going. You need to understand what does that take? What does it mean to get guidance from people? What kind of people need guidance from. In the technology part of the equation, you definitely are going to need a lot of different kind of help and we're going to talk about that.

That's the foundational level. It's just understanding what are you going to do and how are you going to do it and who's going to be helping you do it? The second overarching thing as we mentioned was the profit engine. In the profit engine part where you're going to try to get good clients and get them in a steady way, you need to understand the psychology and the strategy behind how any business that's a small firm type business gets new clients.

This is something that's never discussed in law school. It's really not discussed at bar associations CLEs because you can't get CLE if you're talking about marketing and yet it's the most important thing, because for your practice to grow and to thrive, you have to keep getting new clients. For you to be happy in your practice, you have to get the kind of clients you like working with. Not just any old person who's willing to hire a lawyer.

Understanding what does it take is important. Basically, there are three components to this profit engine part, three sub-components. That is one, understanding how trust works. How do people come to trust a lawyer enough to hire them? The people who you would want as your client who are more discriminating don't just give away their trust very easily. You need to understand how do you attract high-quality clients in a dignified tasteful way, and that involves a discussion about the truth of how trust works generally in today's world, how it works online because it requires a slightly different thing to get people to trust you online than it does if you meet them face to face.

Then the next two parts are what I would say are the only two kinds of marketing that work well for a solo and small firm folks. Unfortunately, there's a lot of confusion about this and there's a lot of snake oil salesman type stuff going on. Basically, after you understand the trust part, you need to understand how do you get clients through referrals or you want to call it networking. Those folks that already trust you would be happy to send you business. There's a strategy for getting folks that already trust you to send you more business more reliably and more of a steady stream as opposed to a haphazard way which is the way most lawyers do it.

Trust awareness is the number one subpart, then understanding referral marketing which is the most powerful type of marketing. Then last, is understanding how to get great clients online in an automated way. Because referral marketing will get you a certain number of clients but you can't bring in clients on demand like you can if you're using the internet. The problem is that most people who try to market on the internet don't really understand it very well, but they understand it better than the people that they are marketing to and unfortunately in the legal world that's most lawyers.

Most lawyers tend to hire people to help them do online marketing without realizing that those folks either are opportunistic—just taking their money—or just as bad, don't really know what they're talking about. They are nice, they mean well but they're clueless. Understanding how trust works will help you discern who you can trust and who you can't. Then once you understand how trust works you're going to want to use referral marketing and you're eventually going to want to use automation and technology to help you market online at low cost, where you can get more clients, more readily and get them to trust you even if they've never heard of you. So, that's the profit engine part.

After foundation, profit engine then the last thing is operations. Then under operations, we also have three components. Component number one is that you need to create systems which is you look at your workflow and say, "Okay, here's how these kinds of problems that come up in our everyday practice flow through our system. Here's how people work on them. Is there any inefficiency in here? How can we eliminate that inefficiency?" You become a student of the efficiency of the workflows in you practice opposed to just saying, "Well, I don't know, we do stuff around here and it gets done." Because if that's how you do it, then you're not going to be able to take advantage of technology, because the next after you have your systems is you're going to start automating things that make sense to automate.

You can only automate workflows that you understand and that you have optimized as much as possible without automation. Because if you've done that then you have a better sense of what you need to plug in, what the automation and how the automation needs to work as opposed to just hiring some techie automation expert and go, "Well, I don't know, we've got some stuff here, could you automate it?" Because they'll happily take your money, but it won't make your practice less chaotic, there may be some things automated, but it's going to reduce your anxiety especially when those things stop working so well.

You have to have good systems that set you up for automation and them whatever you can't automate, you should delegate. If you're a solo practitioner or you're in a small firm, doesn't matter, you should delegate, number one, everything that doesn't require a law license. Even if you're a solo practitioner, there are a lot of things you'll be doing because you'll say, "Well, I'm the only person here. Let me do this." That is not the way to build a successful practice where you have peace of mind, because you're the one that has to do everything.

You need to start delegating things to other people and it's never been easier to find people to do work for you because most of the work that you need to have done can be done from anywhere by somebody who has a computer and knows how to help a lawyer. Could be paralegals, could be secretaries, could be all kinds of different people that can help you run your firm. Those are the folks that are going to do everything that doesn't require a law license.

You do only the stuff that only a lawyer can do. Then even among that stuff, if there's something else that in that realm of lawyer with a law license work that you don't enjoy doing or you aren't as good at doing as your clients need you to be in doing it, then you need to delegate that as well. There again you have options to delegate to people that aren't working full-time for you in the same office if you want to, but if you want that to happen, that's what you need to do. So, the operations is about systems, about automation and then delegation.

That's the overview, you've got your foundation, you need to figure out the vision for your firm, then you need to come up with a success plan, you need understand how you're going to implement this and what kind of help, you're going to get on an ongoing basis. Then you've got the profit engine component where you understand how trust works, you use it to get referrals and then you learn how to do this automatically online, which is more complicated. Then the third part the operations where we just talked about systems automation and delegation. That's an over overview, quick overview of the success blueprint.

In the next episodes, we're going to dig deeper into those three main areas, starting with the foundation piece of the blueprint. I look forward to seeing you in the next episode, until then, wish the best for you and your practice.