

Law Firm Autopilot

A man in a dark suit and sunglasses is sitting on a sandy beach, viewed from the side. He is using a silver laptop. The background features a clear blue sky, several palm trees, and a rocky shoreline leading to turquoise ocean water. The overall scene is bright and sunny.

Ernie Svenson | erniethelawattorney.net

Law Firm Autopilot

A man in a dark suit and sunglasses is sitting on a beach, looking at a laptop. The background features a rocky shoreline, several palm trees, and clear turquoise water under a bright blue sky. The overall scene is peaceful and suggests a remote or flexible work environment.

A 10-part guide to creating a smooth-running practice — where you get better clients, make more money and take more time off

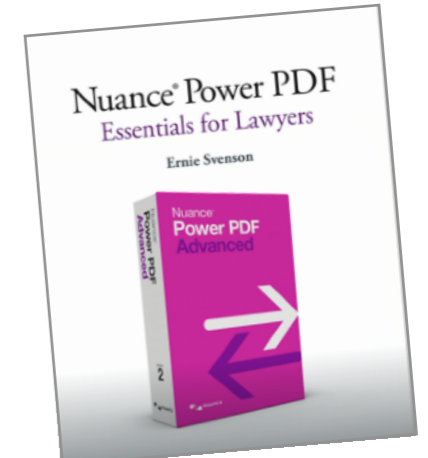
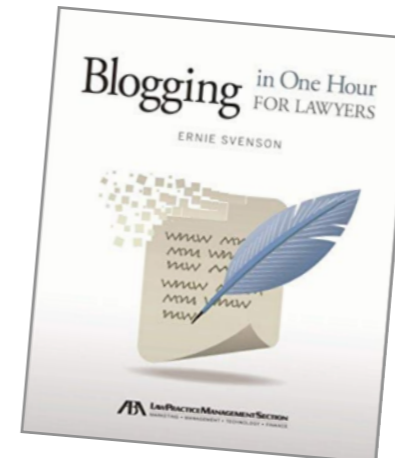
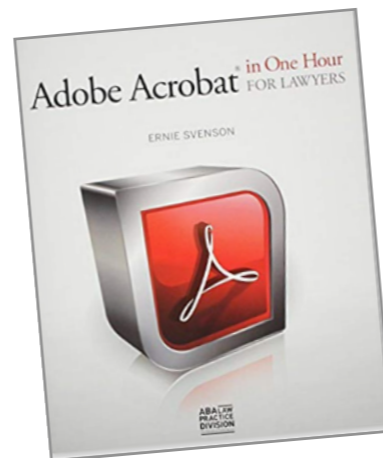
Speaker

ABA TechShow - Chicago
Florida Solo & Small Conf
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Indiana Solo & Small Conf
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Author

Blogging for Lawyers (ABA)
Acrobat in One Hour (ABA)
PDF Essentials for Lawyers
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Awards

ABA GPSOLO
*Solo & Small Firm
Trainer of the Year 2018*

FastCase 50 2011



LAWFIRM AUTOPILOT SUCCESS BLUEPRINT



Envision *Your* Ideal Law Firm



Create Your Success Plan
and Get Help to Implement it



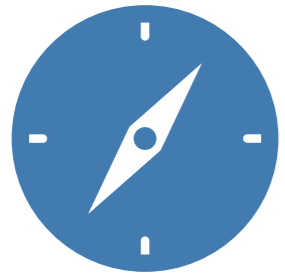
Streamline Your Operations Using
Systems, Automation & Outsourcing



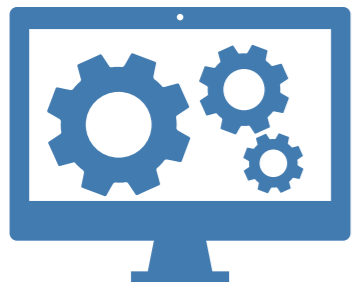
Market Your Practice By Building
Trust Thoughtfully & Strategically



Three Main Elements



1. Approach



2. Operations



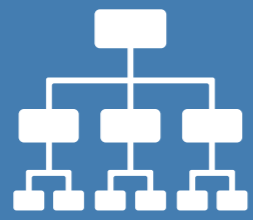
3. Marketing



I. Approach

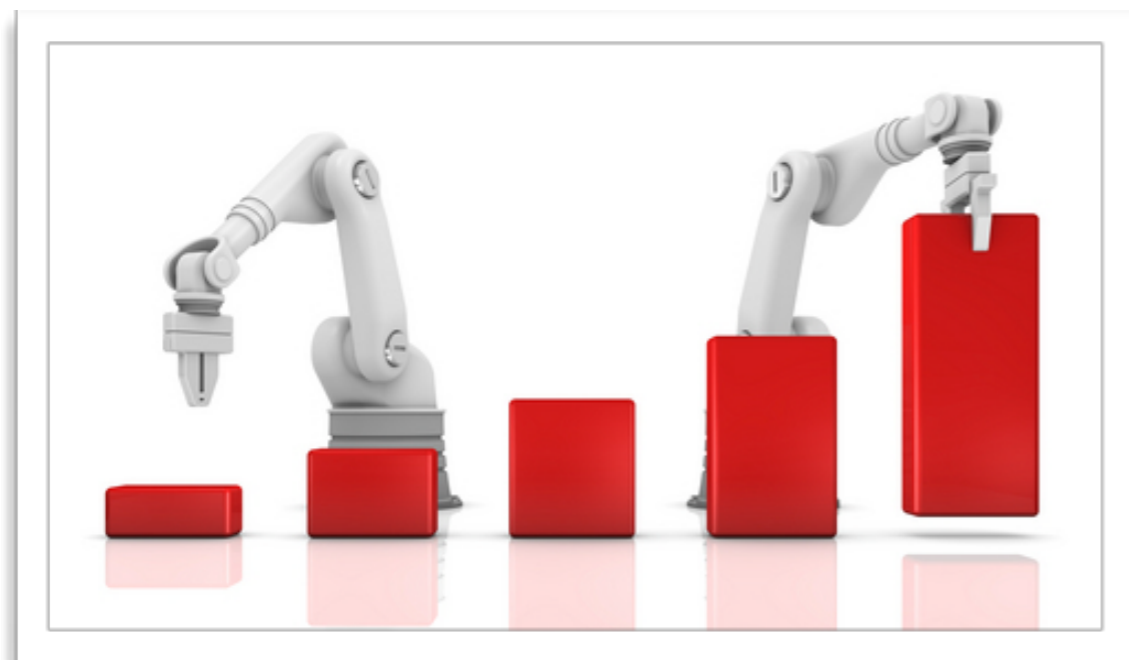
1. Mindset
2. Vision
3. Focus
4. Assistance





II. Operations

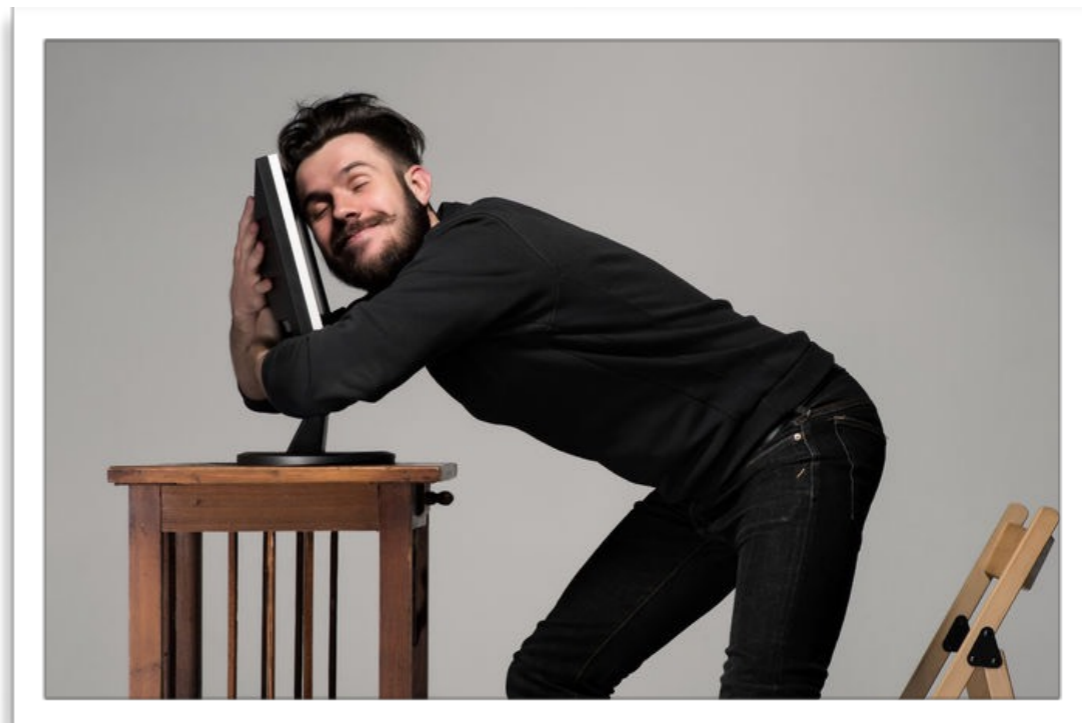
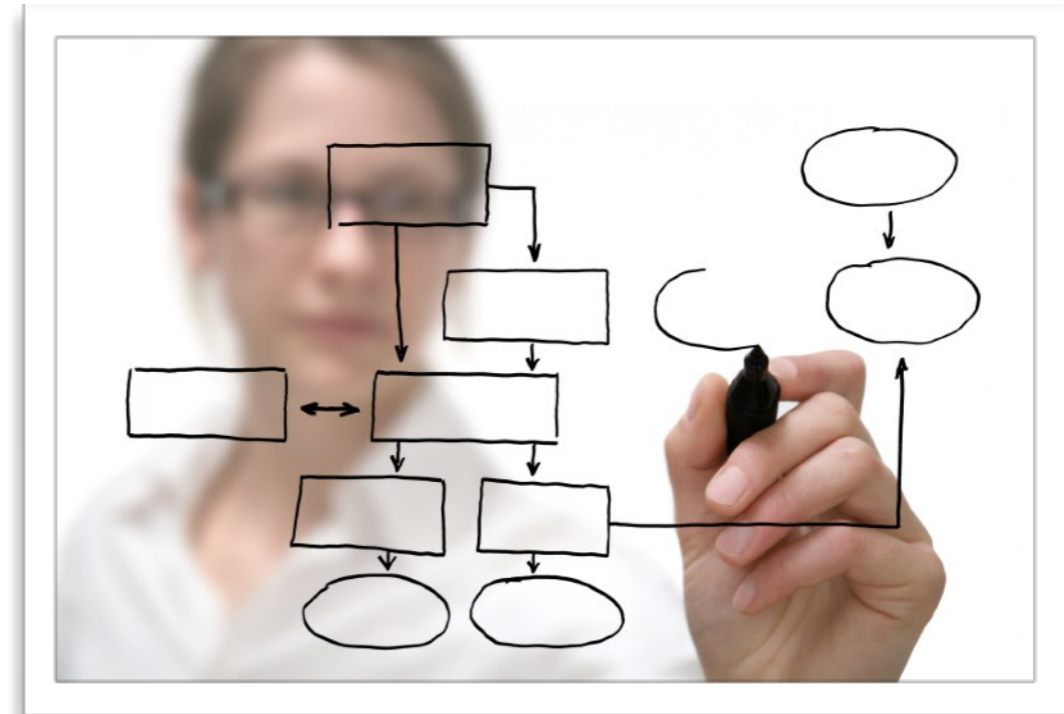
- 1. Systems**
- 2. Streamlining**
- 3. Delegation**





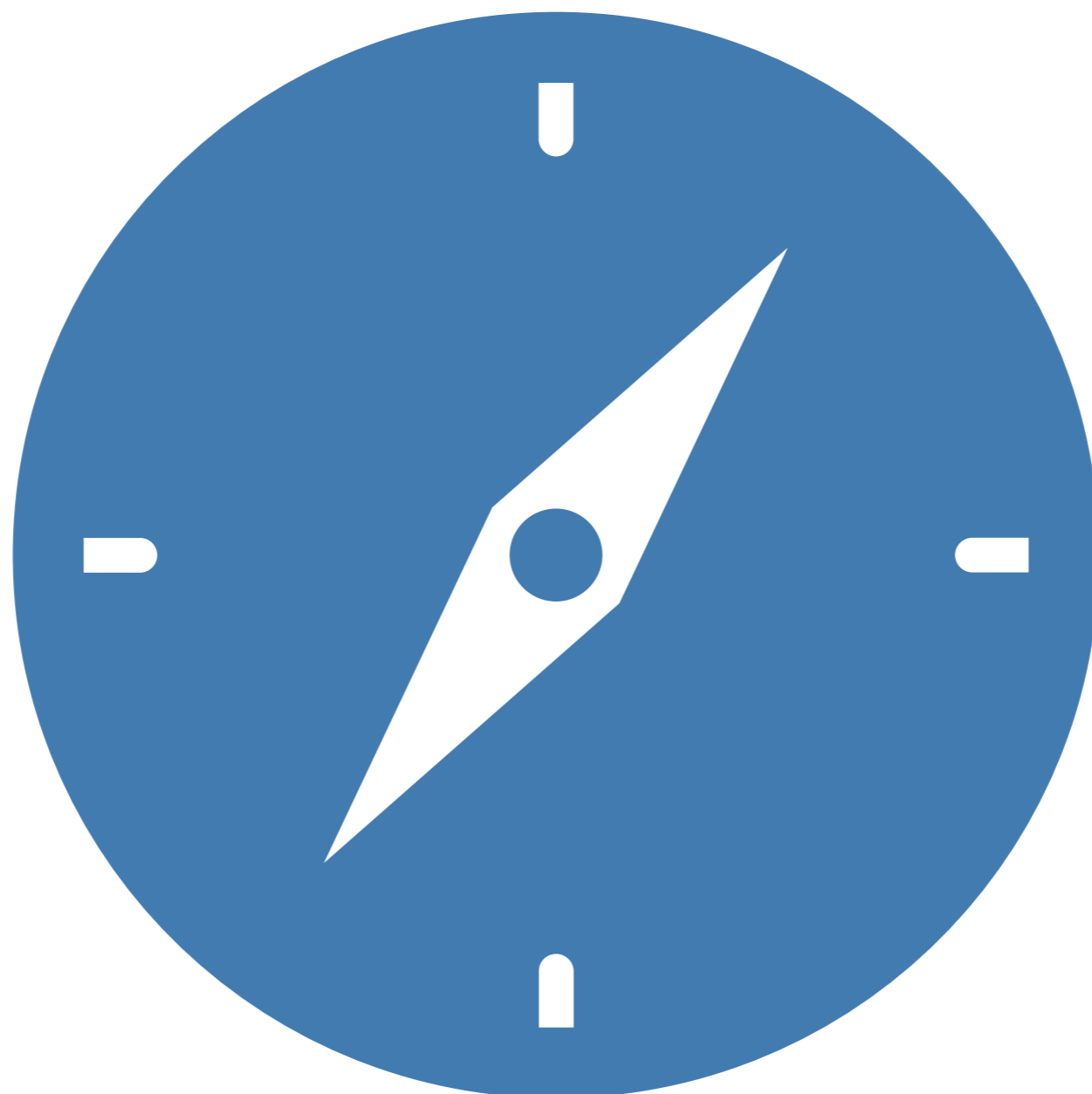
III. Marketing

1. Strategy
2. Referrals
3. Trust-Building





I. Approach:





I. Approach: 1. Mindset







IMPOSSIBLE

5 Key Mindsets

- 1. Growth-minded:** *realize that you can most assuredly achieve massive success!*
- 2. Investment-minded:** *you must invest time, energy, and money to achieve your big goals*
- 3. Open-minded:** *radical methods will lead to mind-boggling results (with less effort)*
- 4. Action-driven:** *take sensible action to get big results (use data to make better decisions)*
- 5. Realistic** - *be prepared for challenges*



VS

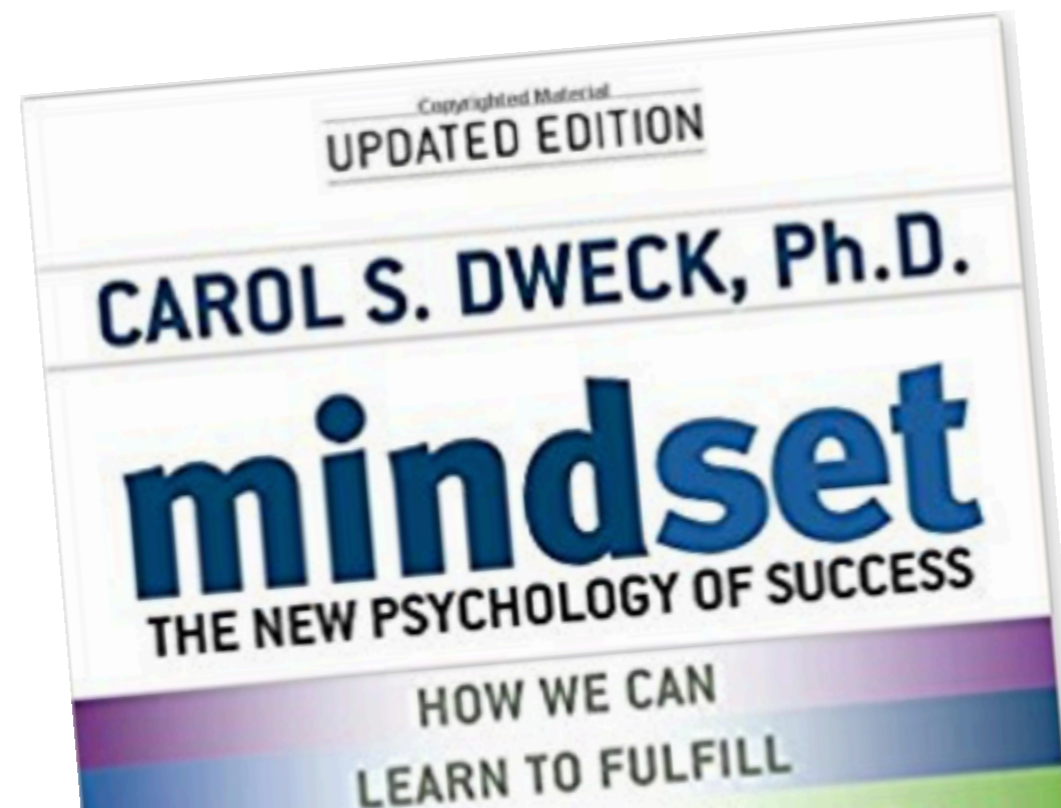


Growth Mindset

Fixed Mindset



Book Recommendation



“Through clever research studies and engaging writing, Dweck illuminates how our beliefs about our capabilities exert tremendous influence on how we learn and which paths we take in life.”

—BILL GATES, *GatesNotes*

“Through clever research studies and engaging writing, Dweck illuminates how our beliefs about our capabilities exert tremendous influence on how we learn and which paths we take in life.”
—BILL GATES, *GatesNotes*



I. Approach: 2. Vision

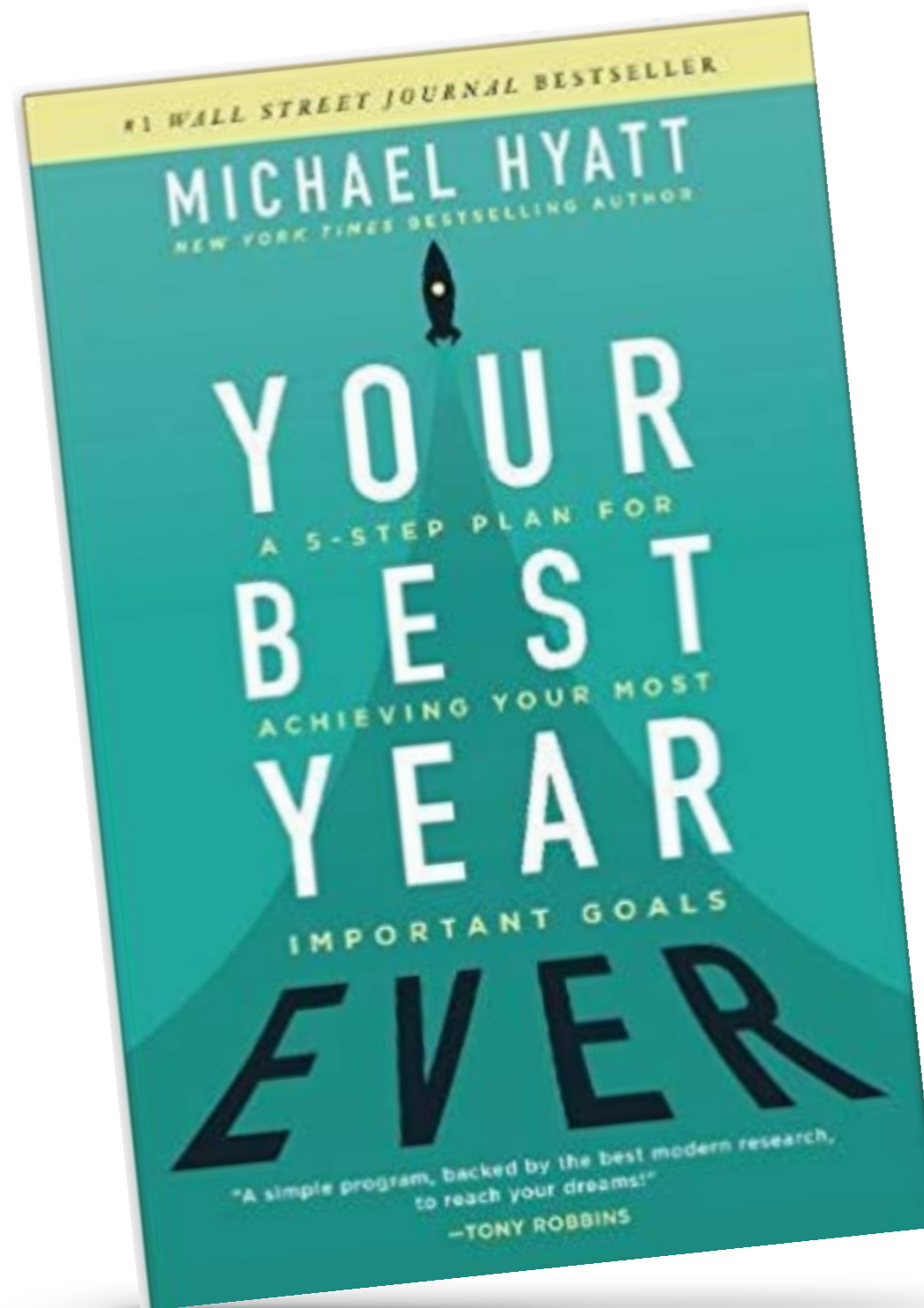




Begin with End in Mind



Book Recommendation

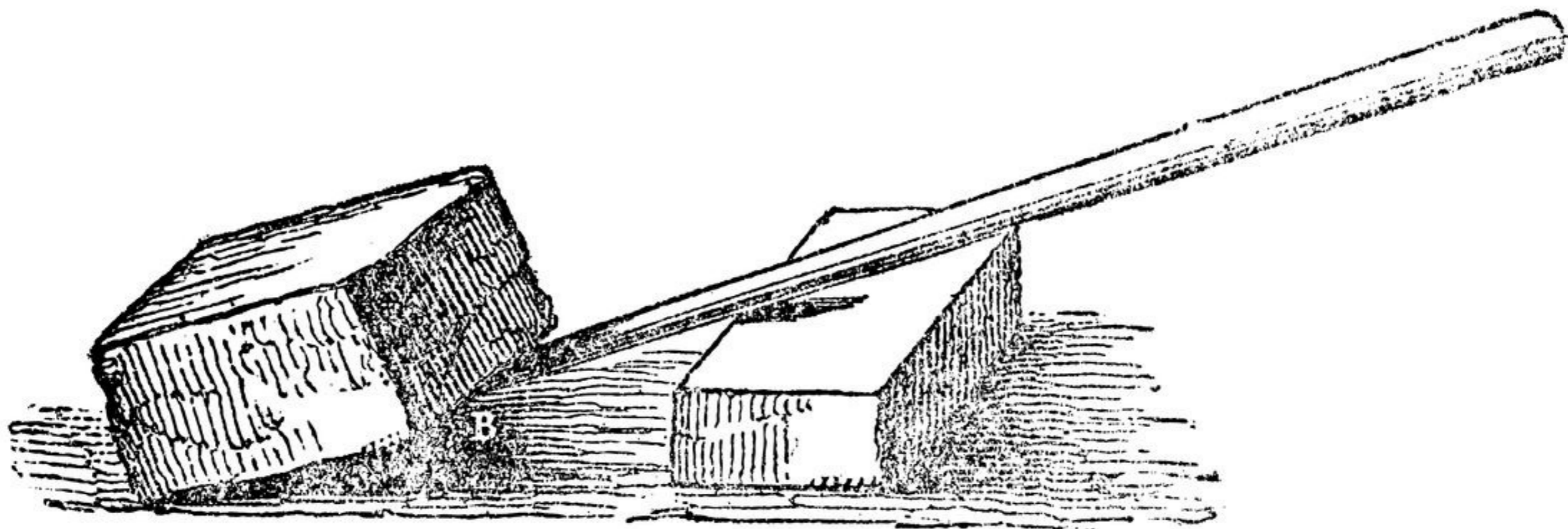




I. Approach: 3.Focus



Leverage



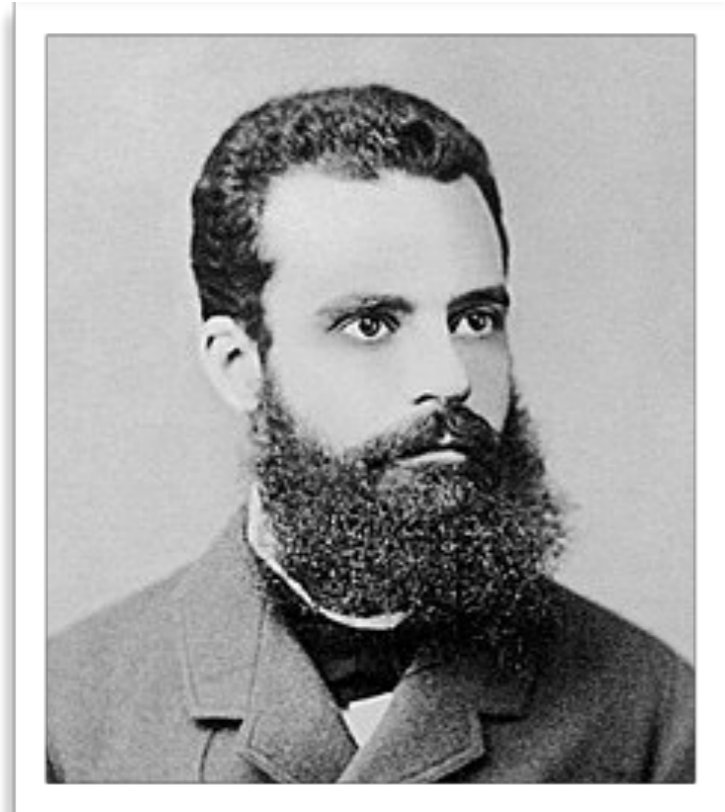
Resource Mgt = Leverage

“Effectiveness is doing the right things.”

— Peter Drucker

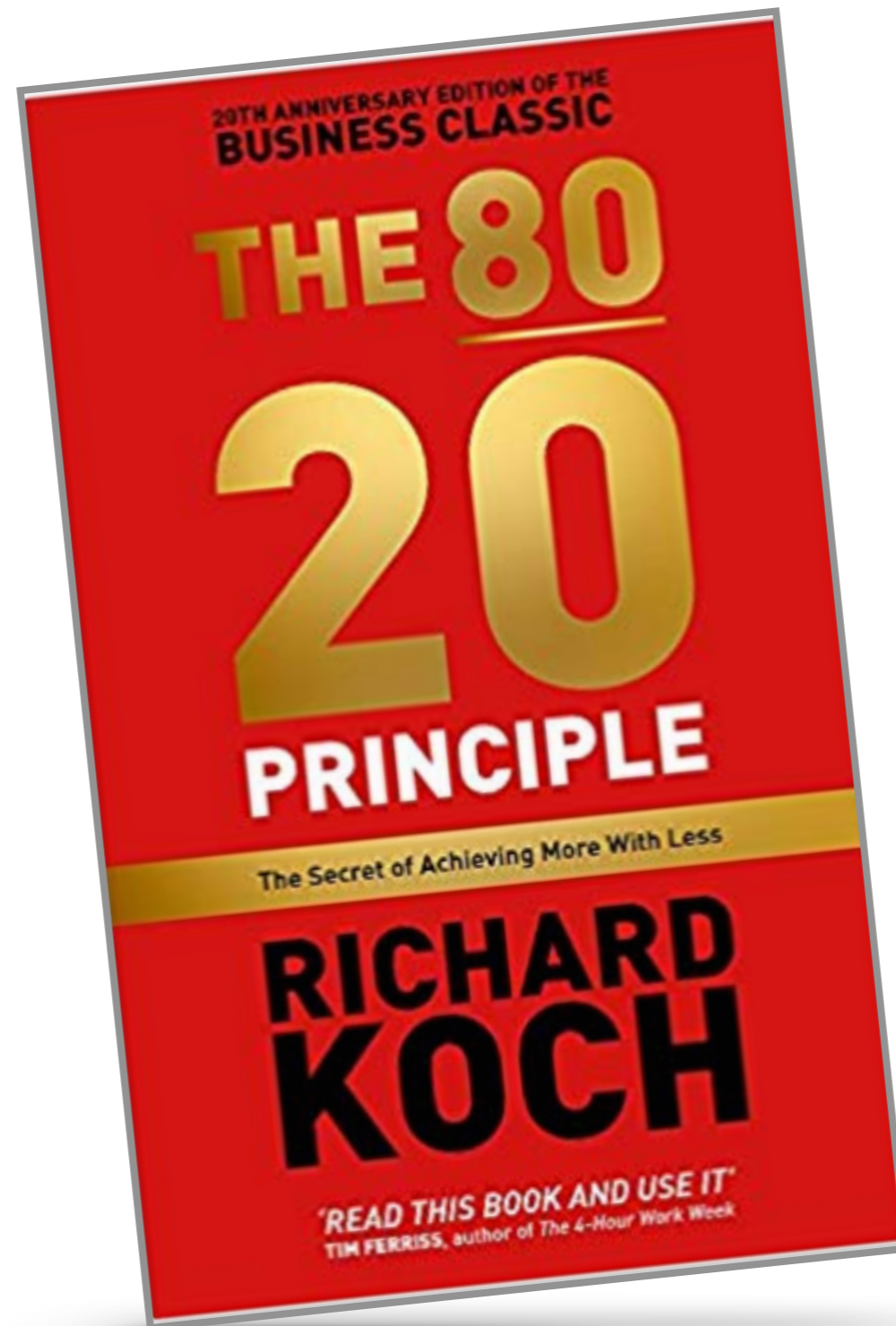


Pareto's Principle



80/20

Book Recommendation





I. Approach: 4.Assistance



3-Part Assessment

Little

Experience

Lots

Altruistic

Bias

Transactional

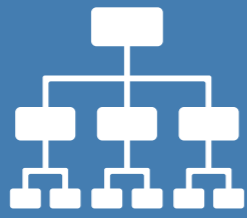
Poor

Instincts

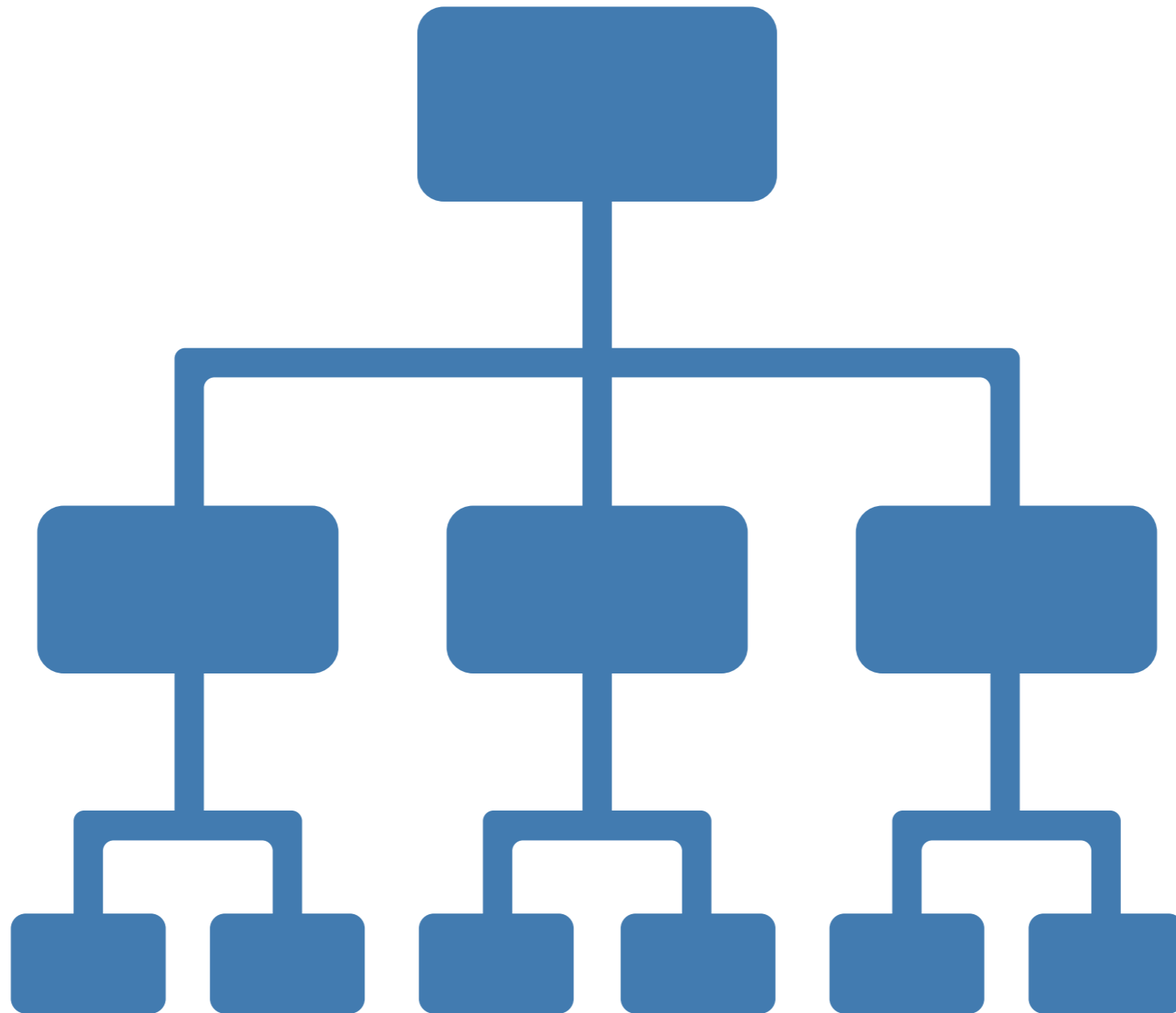
Strong

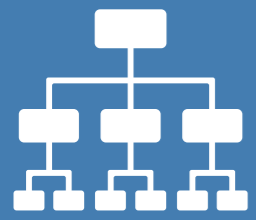
Key Factor

- 1. Experience:** has extensive experience and diverse experience helping lawyers like you that gets positive results.
- 2. Bias:** to what extent is their advice likely to be biased? (*transactional motivation vs. fiduciary or altruistic motivation*)
- 3. Insight:** because they think more deeply about problems their advice contains valuable wisdom (*not just basic helpful advice*)



II. Operations





II. Operations: 1. Systems



Systems

- ▶ **Create order** (*and eliminate chaos*)
- ▶ **Create predictable outcomes**
- ▶ **Avoid, or eliminate, mistakes**
- ▶ **Consistent performance** (*across entire workforce*)
- ▶ **Improve performance** (*even among “less skilled” workers*)

SYSTEMS

PROCESS MAPPING

WHAT?

WHO?

HOW?

WHEN?

WHERE?

RECORDS KEEPING

Calendar

Contacts

Client Matters

Financial

*Progress
Tracking*

PROCESS MAPPING

WHAT?

What tasks?



What workflows?



WHO?

You?



Team?



Outsource?



HOW?

What tools?



What sequence?



WHEN?

Scheduled (routine)?



Conditional Triggers?



WHERE?

Physical Space

In the office?

At a remote location?



In the office?

At a remote location?

Virtual Space

RECORDS KEEPING



CALENDAR

Deadlines



Appointments



CONTACTS

CRM



Phone #'s

Clients



Prospects

Referral Partners



Email List

CLIENT MATTERS

Projects



Tasks



Goals



Responsibility

FINANCIAL

Billings



Collections



Trust Accounts



PROGRESS TRACKING

Marketing ROI



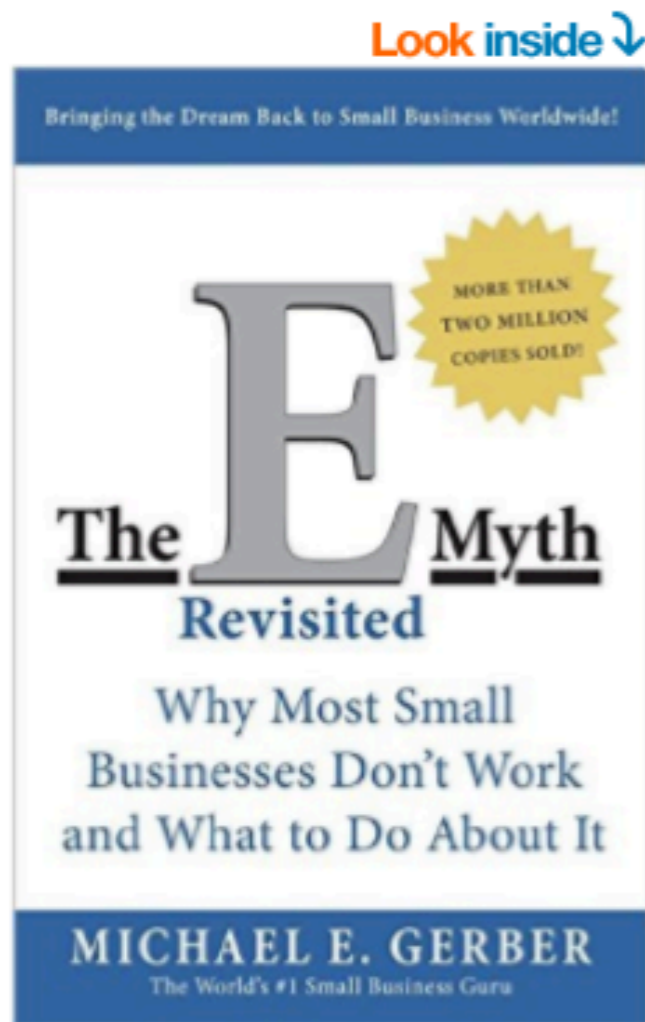
Matter Progress



Goal Achievement



Book Rec: The E-Myth



Flip to back

Listen



The E-Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It Paperback – October 14, 2004

by Michael E. Gerber (Author)

★★★★☆ 1,485 customer reviews

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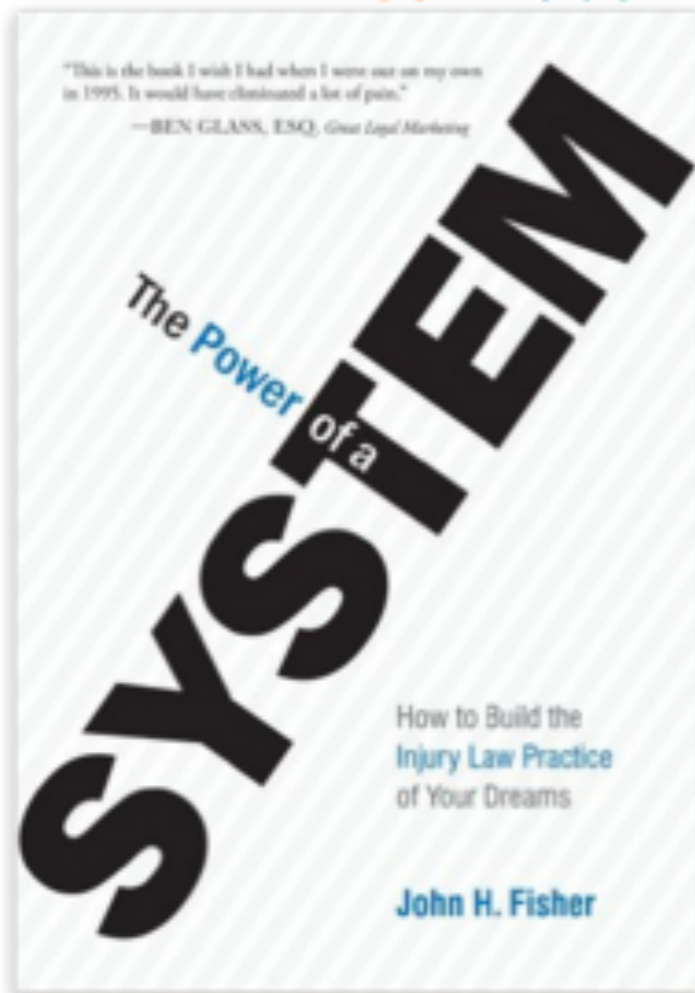
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In this first new and totally revised edition of the 150,000-copy underground bestseller, *The E-Myth*, Michael Gerber dispels the myths surrounding starting your own business and shows how commonplace assumptions can get in the way of running a business. He walks you through the steps in the life of a business from entrepreneurial infancy, through adolescent growing pains, to the mature entrepreneurial perspective, the guiding light of all businesses that succeed. He then shows how to apply the lessons of franchising to any business whether or not it is a franchise. Finally, Gerber draws the vital, often overlooked distinction between working on your business and working in your business. After you have read *The E-Myth Revisited*, you will truly be able to grow your business in a predictable and productive way.

John Fisher's Book

Look inside ↴



The Power Of A System: How To Build the Injury Law Practice of Your Dreams Kindle Edition

by John Fisher (Author)

★★★★★ ▾ 79 customer reviews

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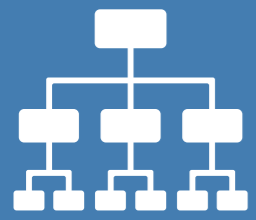
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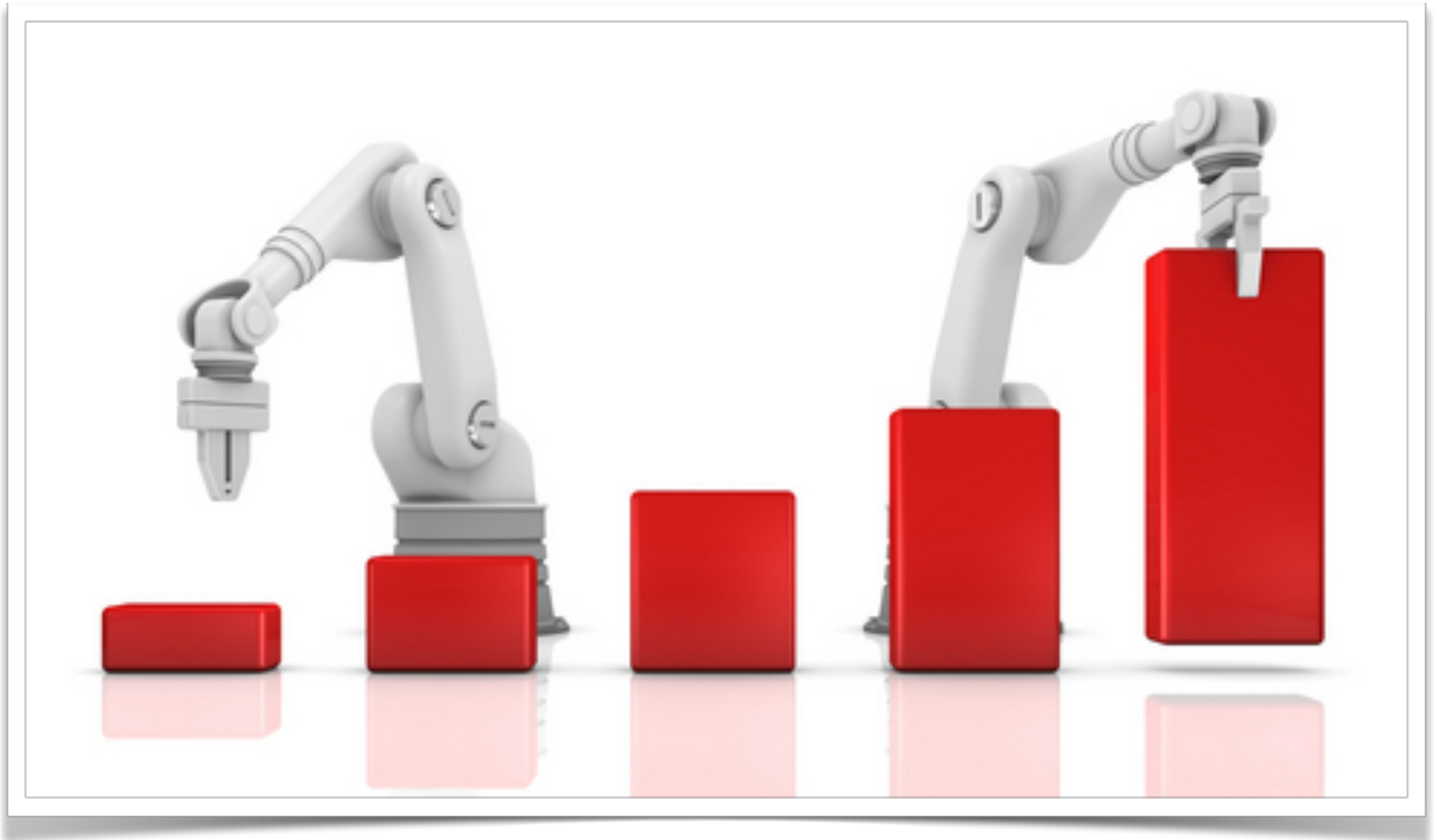
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II. Operations: Automation



Two Rules of Automation

“The first rule of any technology used in a business is that automation applied to an efficient operation will magnify its efficiency...

The second is that automation applied to an inefficient operation will magnify the inefficiency.”

—*Bill Gates*

Simple

Intermediate

Documents

Keyboard shortcuts

Copy & Paste

Search & Replace



Spell Check

Email Signature

Microsoft Quick Parts



Spreadsheet Data Sort

Spreadsheet Recalculation



Software Macros

Merge Field Actions

Text Expansion Software

OCR - Text Recognition

Bates-Stamping



Voice to Text Transcription

Online Scheduling Services

Automated Client Follow Up

Advanced

Documents

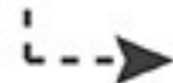
Email Autoresponders: Marketing



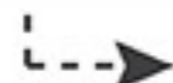
Document Assembly: Form Building



Predictive Coding: E-Discovery



Algorithm-Driven Negotiation



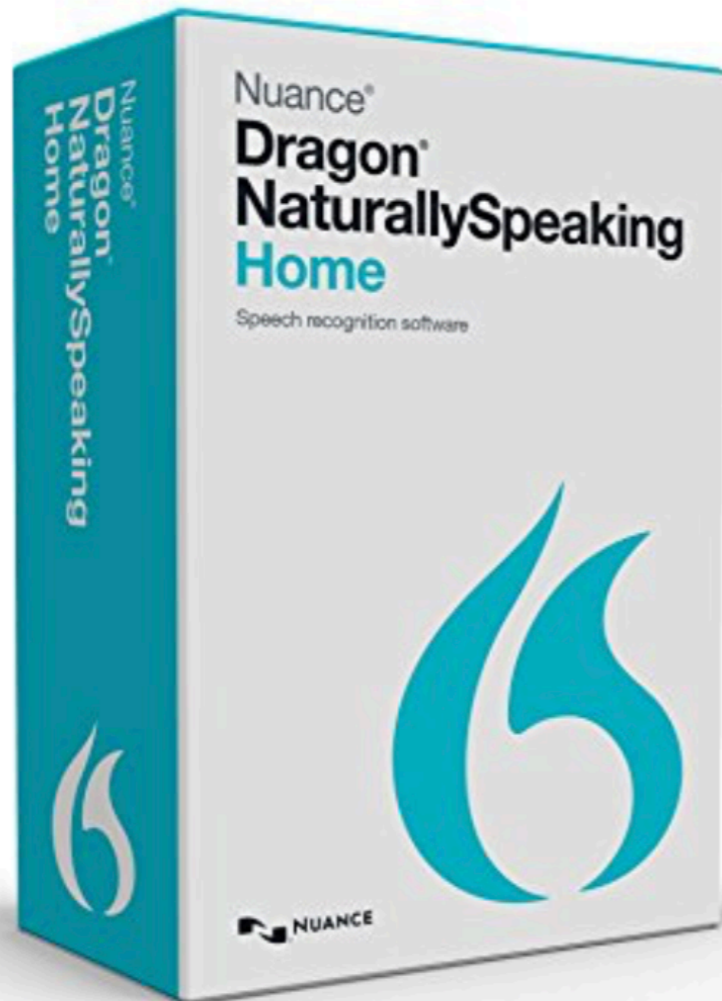
Self-Driving Cars



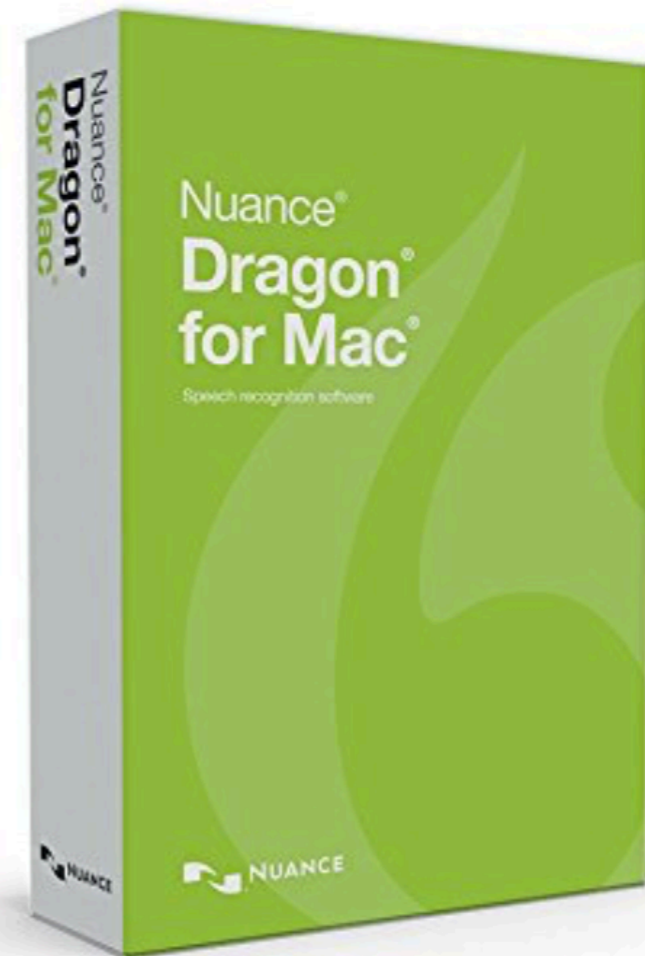
Keyboard Shortcuts

Command	Windows Shortcut	Mac Shortcut
New	Ctrl+N	⌘ +N
Open	Ctrl+O	⌘ +O
Save	Ctrl+S	⌘ +S
Undo	Ctrl+Z	⌘+Z
Redo	Shift+Ctrl+Z	Shift+⌘ +Z
Copy	Ctrl+C	⌘ +C
Paste	Ctrl+V	⌘ +V
Print	Ctrl+P	⌘ +P
Preferences (General)	Ctrl+K	⌘ +K
Zoom In	Ctrl++ (plus sign)	⌘ ++ (plus sign)
Zoom Out	Ctrl+— (minus sign)	⌘ +— (minus sign)
Help	F1 or sometimes Ctrl+?	F1 or sometimes ⌘+?

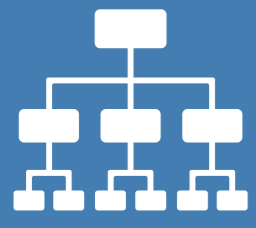
Dragon Dictation



PC Home (\$60)



Mac (\$200)



II. Operations: Delegation








Delegation Keys

- ▶ **You should only do “lawyer work”**
- ▶ **You should only do the kind of lawyer work (1) you are really good at AND (2) that you enjoy**
- ▶ **Real barrier is mindset and momentum**
- ▶ **Virtual Assistance: Receptionist, Bookkeeper, Executive Assistant**

The “Ideal” Assistant



The 5 Delegation Levels

-  ▶ **Level 1:** Do exactly what I tell you to do. Be explicit about how to do the task (*don't expect them to read your mind*). Give them a well-crafted checklist, or process map, to follow.
-  ▶ **Level 2:** Research the options. Then come back and we'll discuss them. I want to see how well you evaluate options
-  ▶ **Level 3:** Research options and make a recommendation. I want to see you make a decision and then see the thought process behind it.
-  ▶ **Level 4:** Take action and report back after. I want to check in to make sure you're getting helpful feedback, and give you suggestions for improvement if necessary.
-  ▶ **Level 5:** Take action and don't report back unless you have a problem.

Virtual Assistance



EA Delegation

- ▶ **Calendaring:** using a shared calendar synched via the cloud. Can make appointments, or move them. Can help you remember upcoming appts. Will spot conflicts.
- ▶ **Email:** using cloud-based email service, can handle many routine email requests on your behalf. Can file emails, or suspend them for later action.
- ▶ **Research:** travel research (flights, hotels, rental cars), gifts, repair issues (mostly done online, or by phone).
- ▶ **Phone Calls:** phone clients to confirm appts, or make any calls that save you the agony of dealing with petty problems

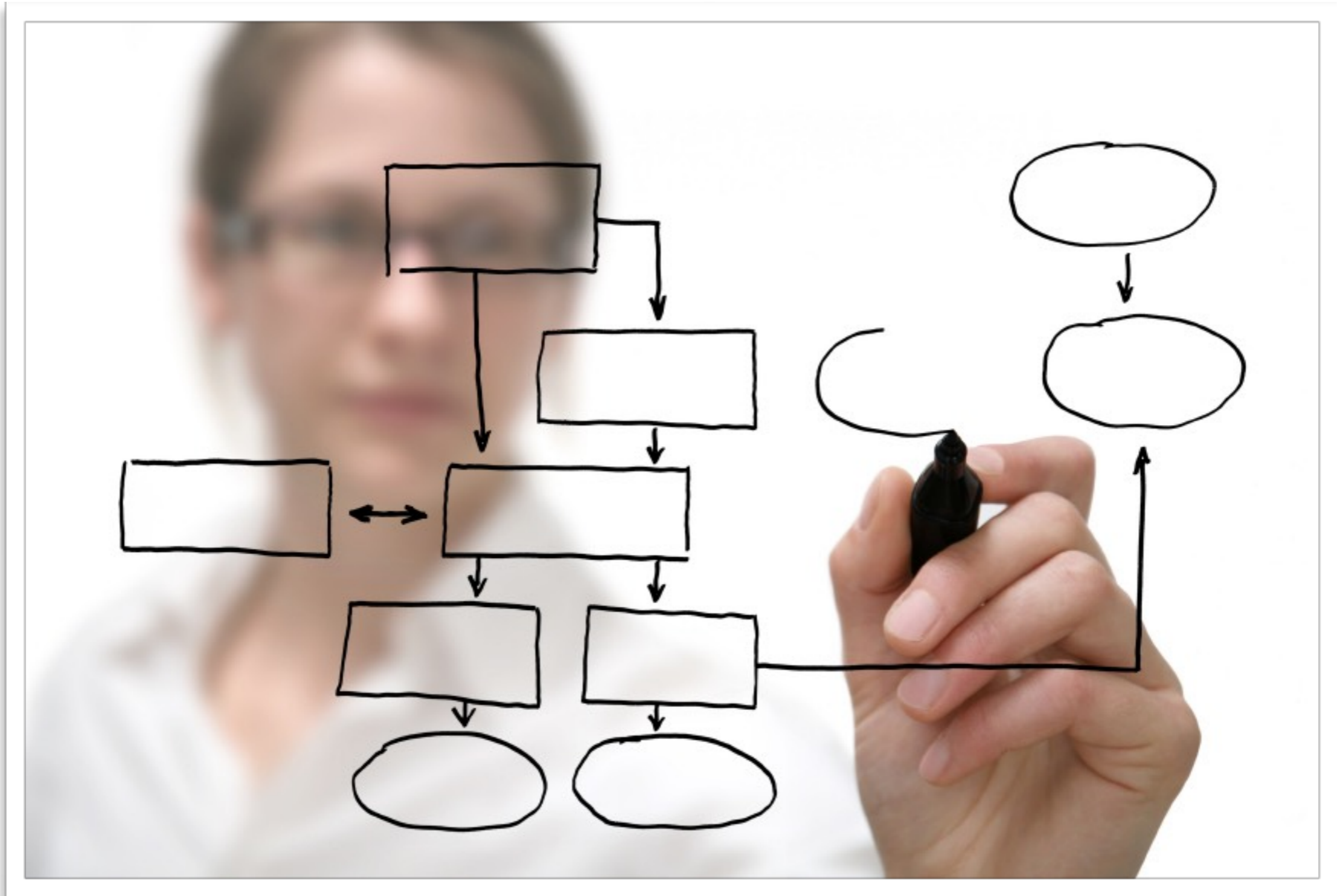


III. Marketing





III. Marketing: Fundamentals



Top Concerns About Starting a New Firm



Cashflow Fears

85%



Client Quantity

75%



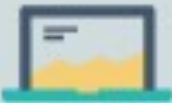
Client Quality

70%



General Fears

40%



Technology

35%



Accounting

35%



Staff Needs

30%



Name? Entity?

20%



Phone Answering

10%

3 Types of Clients

1. Poor Clients: ones you HAVE to take on because:

- ▶ You're desperate to cover overhead & pay the bills
- ▶ You're just starting a new practice and you can't be picky
- ▶ You have no idea how marketing actually works.

2. Mediocre Clients: ones you feel like you should take because:

- ▶ They were referred by someone you feel obligated to
- ▶ They seem nice, and you like them okay
- ▶ Their problem is one you've worked on before

3. Great Clients:

- ▶ Love you and everything you stand for (*your values*)
- ▶ Happily pay your bills on time, without complaint
- ▶ Enthusiastically refer their family and friends to you



Marketing: Trust Building Progression



Client's state of knowledge

Doesn't yet know you



Know you, but don't yet like you



Like you, but don't yet trust you



ONLINE MARKETING

REFERRAL MARKETING

1st Time website visitor, or total stranger

Met you once at some event

Met you a few times, or has heard of you

Trusts you somewhat



Trusts you a lot



Trusts you completely

100

Knows of your good reputation

Someone they trust has said good things about you

Someone they trust a LOT has said good things about you & they checked out your website and it did a good job of making you seem trustworthy

They've interacted with you over a significant stretch of time, AND decided that: (1) you know your stuff, and (2) you care deeply about your clients

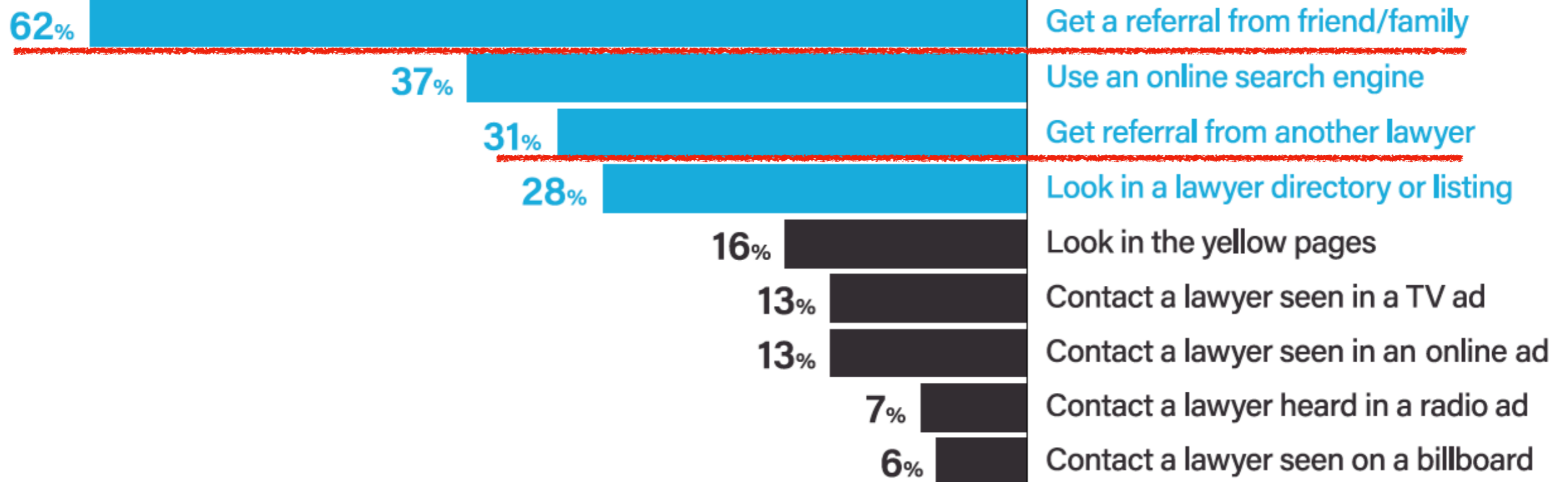


III. Marketing: Referrals



Leverage Existing Trust

How do consumers find a lawyer?



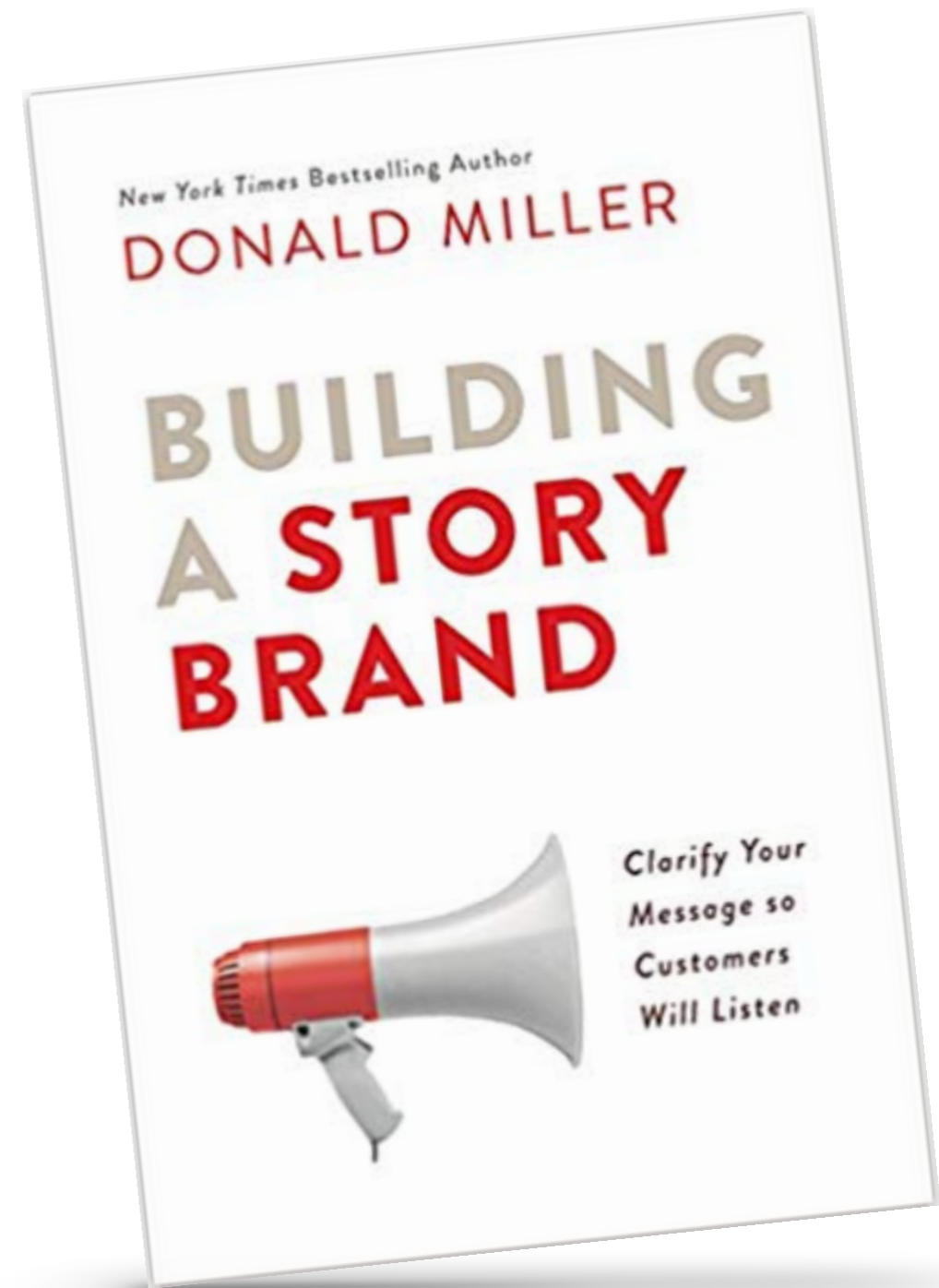
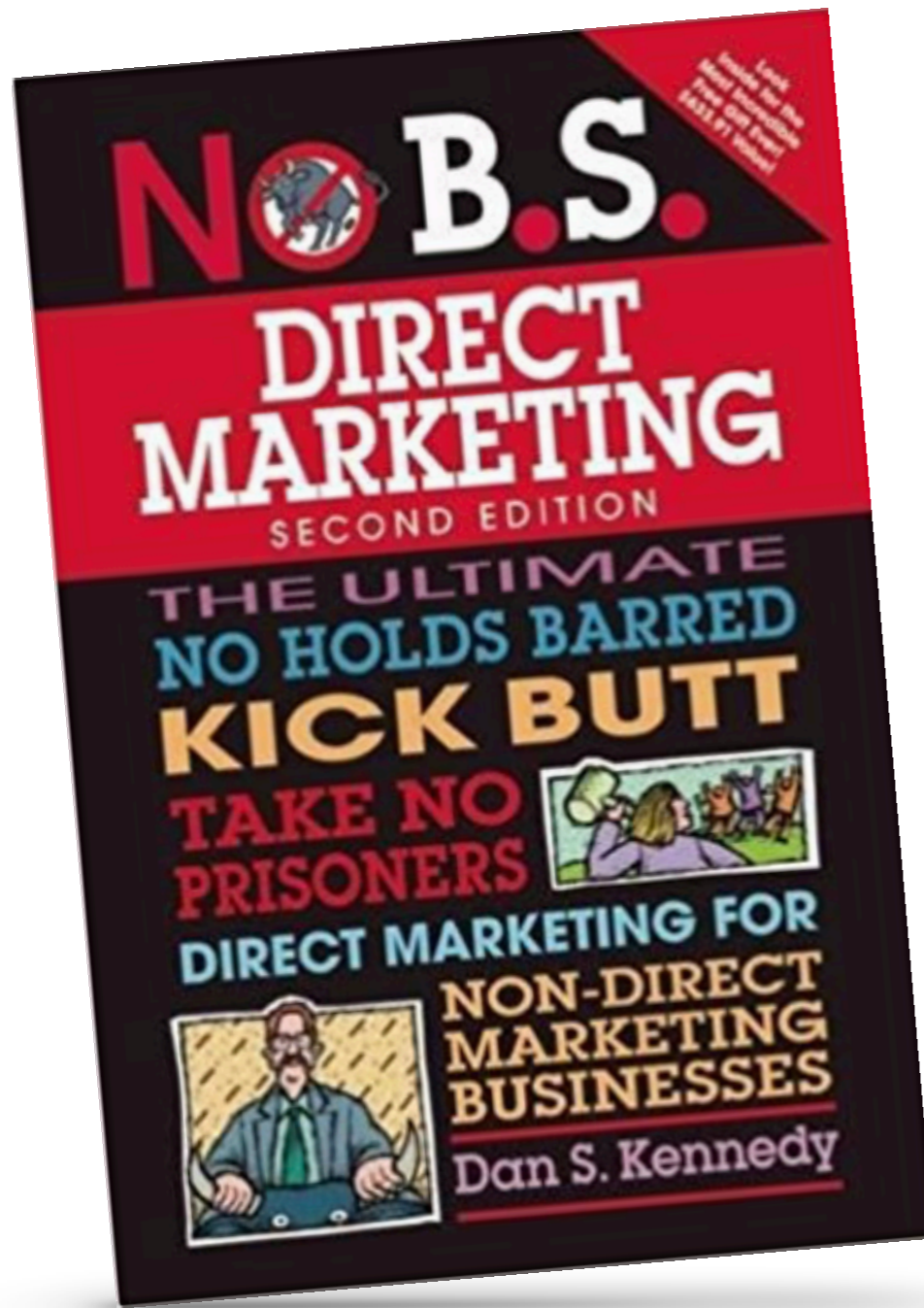
The Keys to...

- ▶ Referral marketing leverages trust that already exists
- ▶ It's easy, inexpensive & powerful
- ▶ It doesn't make you feel awkward
(if it's done properly)
- ▶ Done “properly” means: you don't even suggest that you want, or need, new business
- ▶ But there are some downsides...

III. Marketing: Online



Book Recommendations



Conclusion

**You can
do it too!**



LAWFIRM AUTOPILOT SUCCESS BLUEPRINT



Envision *Your* Ideal Law Firm



Create Your Success Plan
and Get Help to Implement it



Streamline Your Operations Using
Systems, Automation & Outsourcing



Market Your Practice By Building
Trust Thoughtfully & Strategically