

# LAWYER ALERT

Stopping Medical Injustice

## How to Transform Your Law Firm into a BUSINESS

The owners of the most successful law firms will tell you (if you ask) that their key to success is simple: they run their law firm like a business. Seems pretty fundamental, but how many law firm owners run their firm like a business? Almost none.

The ultimate goal is a self-managing law firm. A self-managing law firm works when you're not there for weeks and even months. Delegation is the key to building a self-managing law firm.

Just because you can do something doesn't mean you should do it. Almost everything you do can be delegated. Always think: can someone else do what I am about to do? If so, you must delegate. You have to overcome false fears and beliefs that you are the only person who can run your law firm.

### How 3 Lawyers Transformed from Lawyers to CEOs

Craig Goldenfarb, Esq. grew his law firm, Gold Law in West Palm Beach, Florida, from 2 employees to 80 employees through the power of delegation.

Craig does not take client meetings and does not go to court or handle depositions.

Craig is the consummate CEO of his business and that never would have happened if he had not ruthlessly delegated tasks. This led to one of the most successful 8-figure law firms in Florida.

*"If your business depends on you, you don't own a business—you have a job. And it's the worst job in the world because you're working for a lunatic!"*

**Michael B. Gerber**

Michael McCready, Esq., a highly successful plaintiff's lawyer in Chicago, can tell precisely what each team member in his law firm is doing with his case management software, Smart Advocate (highly recommended!). Michael doesn't hope that work is getting done, he gets a complete report of the work of his team in a Staff Management Activity Report that is emailed to him every day at 4 p.m.

Lin McCraw, Esq., of the McCraw Law Group in McKinney, Texas, promoted his firm's long-time office manager, Gloria Campos, into Chief Operating Officer and aggressively instilled the Entrepreneurial Operating System ("EOS") in his law firm. Lin's firm has dedicated systems for onboarding team members, intake and case management and now, the firm functions so well without him, Lin works from home 4 days a week.

### 11 Rules for Building a Self-Managing Law Firm

These simple rules will, if implemented, transform your law firm into a business.

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## Rule #1: Time and Energy Audit

What do you do throughout the workday? You must understand what you are doing with your time, ideally in increments of 15 minutes. Write the tasks down and grade each task on a scale of 1 to 4. 1 star is a task that you hate doing and 4 stars is an activity that lights you up and makes money for you.

- Check email (\*)
- Attend team meeting (“daily huddle”)(\*\*\*)
- Update referral partners (\*\*\*\*)
- Speak with qualified prospective client (\*\*\*)
- Prepare quarterly financial report (\*)
- Respond to questions from team members (\*)
- Conduct a podcast interview (\*\*\*)
- Conduct video for YouTube (\*\*\*)
- Meet with client to prepare for deposition (\*\*\*\*)
- Unscheduled phone calls (\*)
- Draft monthly newsletter (\*\*\*\*)

Take the tasks that are 1 or 2 stars and begin delegating them. Delegate one at a time and continually delegate tasks that are 1 or 2 stars until there are none left. You should focus on the most valuable tasks that you enjoy. What activities do you love doing? That is your sweet spot, where you should strive to spend most of your day (85% of your time is ideal).

*“Once you clearly see where you’re spending your time, you’ll want to buy it back.”*

**Dan Martell**, *Buy Back Your Time*

Dan Martell, author of *Buy Back Your Time*, recommends that you continually audit your time to “determine the low-value tasks that are sucking your energy. Then you transfer those tasks, optimally, to someone who’s better at them and enjoys them.”

## Rule #2: Delegate Administrative Tasks

Your mission is simple: delegate and elevate. Author, Dan Martell, tells us that “someone else should be doing about 95 percent of your current work so you can get back to what matters.” Begin by delegating administrative tasks and intake calls.



**Stop Checking Email:** Start delegating the tasks that you dislike the most. Who can you delegate this to? Clearly define the task, choose the right person for the job and give them authority (“you have my permission to act without my permission.”)

*“I have an assistant in my email all day long. I don’t touch my email inbox. It was life altering.”*

**Russ Nesevich, Esq.**, Nesevich Law, LLC

**Appointments:** Hire an administrative assistant to schedule lunch dates with current and prospective referral partners.

**Calendar:** Have a team member manage your calendar. Your administrative assistant’s job is to make sure you have long blocks of time with no interruptions or distractions, so you can be productive.

**Intake Calls:** You should not be involved in taking intake calls. The intake calls and follow up with prospective clients should be handled by your intake team. Once a lead has been qualified for merit, you may decide to speak with the client.

**Intake Follow Up:** You should have a member of your intake team whose sole responsibility is to follow up with new leads.

## Rule #3: Automate Tasks

Automate as many tasks as you can.

**Initial Client Communication:** The initial sequence of email and text communication with new clients should be automated with a customer relationship management (CRM) software.

Each email should explain your firm’s processes for evaluating new cases, so your prospective clients know what to expect. By automating the initial sequence of communication with new clients, your intake team won’t have to continually respond to the same questions.

**Staff Management Activity Reports:** At 4 p.m. every workday, have emails sent to you with the “Staff Management Activity

Report” and the report of new leads from that day. The emails can be automated through your case management software.

**Intake Reports:** At 4 p.m. every workday, you should receive a report via email listing the intakes received that day. You will have a quick glimpse at the number of intakes and the quality of new leads. This intake report can be automated through your firm’s case management software.

## Rule #4: Hire Before You are Ready

Dan Martell tell us that “80% done by someone else is 100% freaking awesome.” If you are not sure whether you’re ready to hire, hire anyway. The compensation is paid over the course of time, so you don’t have to worry about paying the annual salary at one time.

*“Some people scoff at paying someone else to do work they hate. I think it’s selfish not to.”*

**Dan Martell**, *Buy Back Your Time*

Avoid micromanaging the work of your team. Hire exceptional team members and let them go to work. The worst thing you can do is dictate how the work should be done. Tell your team members that they don’t need your permission to act and it is okay to make mistakes.

## Rule #5: Business Owner’s Mindset

The highest and best use of your time is business development. If you are involved in the grind of administrative work, your firm will not grow. Treat your time as precious as it is.

**No unscheduled phone calls:** Set a schedule for phone calls, e.g., 4 p.m. to 5 p.m. on Tuesdays and Thursdays, and whenever possible, delegate client communication to your paralegals. Do not let team members schedule sales calls without your authorization.

*“Strive to spend at least half of your time working in the business, rather than on the business.”*

**Craig Goldenfarb, Esq.**

**Know Your Numbers:** Pick the 3-5 key performance metrics that matter the most to your law firm. Post your KPIs on a scoreboard and monitor them weekly.

Our firm's key metrics consist of: (1) confirmed trial dates; (2) projected revenue for the next 12 months; (3) # of intakes per month; (4) # of Google reviews; and (5) # of referral partners.

### Rule #6: Hire toward Your Weaknesses

If you are a visionary, but are not strong in organization or implementation, hire a team member who can do the tasks that are not your strength. If you hate administrative tasks or finance, hire a bookkeeper who will monitor your revenue and expenses like a hawk. Continually hire towards your weaknesses.

*"You build the people, and let the people build the business."*

**Dan Martell, Buy Back Your Time**

The best team wins (not the best lawyers). Hire superstars and demand excellence. You cannot accept average team members.

### Rule #7: Beware Upward Delegation

Upward delegation occurs when a team member tries to delegate a task to someone above them, such as a secretary attempting to delegate a task to a paralegal or lawyer.

*"Don't un-delegate it. Un-delegation is a curse. It is the worst thing you can do as a leader. Be careful of that trap."*

**Craig Goldenfarb, Esq.**

When a team member tries to delegate work to you, ask them to (a) identify the issue, (b) list 3 possible solutions, and (c) make a recommendation. You will not speak with them until this has been done. Author Dan Martell calls this the "1:3:1 Solution".

### Rule #8: Organizational Chart

A successful business has well-defined departments. Everyone has to know who their direct supervisor is.

*"While some entrepreneurs think, One day, I can stop this madness if I work hard enough, smart entrepreneurs think, Today, I will build a game I want to play forever."*

**Dan Martell, Buy Back Your Time**

Ideally, you will only have 1 direct report. Your direct report (e.g., Chief Operating Officer) will ensure you are not bombarded

with interruptions and distractions and you can focus on the work that will make the biggest impact.

### Rule #9: Outsource Everything You Can

Begin by determining what to delegate: (a) lien resolution; (b) medical records retrieval; (c) appeals and motions; (d) email.

*"\$100 million companies weren't built on \$10 tasks."*

**Dan Martell, Buy Back Your Time**

Our firm outsourced lien resolution to Precision Resolution in Buffalo, NY. The results are extraordinary and our team spends no time on lien resolution. The cost is a reimbursable case expense and we are updated periodically by Precision Resolution on the results. Outsourcing lien resolution has been a win for our clients and our firm.

### Rule #10: Live in Your Unique Ability

List 5 activities that you love doing and are better at doing than anyone in the world. This is what Dan Sullivan of Strategic Coach calls your "Unique Ability", and this is where you should be spending most of your time.

*"Eventually, we must embrace trading our money for more time. When we do, we arrive in a new era of productivity, gaining leverage."*

**Dan Martell, Buy Back Your Time**

Author Dan Martell wants you to spend time on the tasks that "light you up" and make the most money. These activities are the highest and best use of your time. I try to spend time updating our referral partners on the status of referred cases. Our referral partners are grateful for the update and they build the referral relationship and virtually guarantee future referrals.

### Rule #11: Learn to Say "No"

Decline commitments that don't align with your priorities and goals. Resist the temptation to join committees and boards that will regret joining later. These boards and committees are a time suck and almost never a good use of your time.

*"Through delegation and replacement, money can buy you more time to spend on building the company and ultimately the life you desire."*

**Dan Martell, Buy Back Your Time**

## A Case Study in Delegation

Will delegation transform your law firm into a business? In early March, 2024, our firm hired our first Chief Operating Officer, Vince DeCicco. This was a big step for our firm and I had no idea if it would work.

These are the results in the first 6 weeks with our Chief Operating Officer:

- Our firm's Google reviews increased from 621 to 715 (3rd most of law firms in NYS).
- Opened a new office in the Bronx (Riverdale).
- Completed renewal application for malpractice insurance.
- Changed name of law firm from John H. Fisher, P.C. to The New York Injury & Malpractice Law Firm, P.C.
- Arranged for CPR/AED training for our team members with the American Red Cross.
- Helped organize our mastermind in Boston (the "Mastermind Experience").
- Began a new practice area of mass torts for our firm and established a referral relationship with a leading mass tort law firm in NYC.
- Resolved inner conflict/dispute among team members.
- Interviewed prospective employees.

And our COO is just getting started. The hiring of a Chief Operating Officer might be the best move our firm has ever made. There is just a lot less administrative work for me and as a result, I can focus on marketing, business development and the work that I love doing (such as writing this newsletter).

*"You replace yourself in your company in a manner that continually buys back your time so you can spend it where it matters most."*

**Dan Martell, Buy Back Your Time**

But you don't have to hire a COO to buy back your time. An administrative assistant is a good place to begin and once you begin buying back your time, you'll have more time for the work that you love.

## How to Get More Google Reviews for Your Law Firm than Any Other Firm in Your State



Google reviews are marketing gold for your law firm. Steve Fleschner, Esq., a disability and injury lawyer in Terre Haute, Indiana, increased his firm's Google reviews from roughly 100 to 1,239 by rallying his employees in the process. Some team members were not helpful, but others cranked out reviews. Getting Google reviews became a game-changer for Steve's law firm and the end results have been an eye-opener.

What can you do to gamify the process of Google reviews? You must rally your team and make sure they know that a Google review should be requested with every positive interaction that they have with a client or vendor. Make sure your team knows that you have specific goals for Google reviews and they will be rewarded for their efforts.

### Our Firm's Google Review Rewards Program

We need your help. Our goal is 1,000 Google reviews by December 31, 2024. This is a stretch goal that will be challenging, but attainable. Currently, our firm has 715 Google reviews (3rd most of any law firm in NYS). We will need your help to reach our goal.

### Your Number: 25 Google Reviews

Your number is 25. 25 is the number of Google reviews that we'd like you to generate for our firm by December 31, 2024. 25 Google reviews is very attainable, as it requires fewer than 3 Google reviews a month.

Report the number of Google Reviews that you received on a scoreboard in our firm's conference room. There will be 1 scoreboard showing our firm's progress and another showing each team member's progress. The scoreboards will show our progress and how far we need to go.

### The Best Way to get Google Reviews

What is the best way to generate Google reviews? You won't get a Google review unless you ask. Ask everyone you know, including our former and current clients and any vendor who works with us (e.g., new clients, medical experts, landlord, etc.).

After a positive phone call with a prospective client, ask if they will leave a Google review and if so, send them a link via text or email. The URL, [www.ReviewFisher.com](http://www.ReviewFisher.com), leads to our firm's Google review web page.

*Practice Limited to the Representation of Seriously or Catastrophically Injured Persons*



*Having some fun and laughs at the House of Blues following the Mastermind Experience in Boston.*

"When you have a spare moment, would you mind posting a review on our firm's Google profile? (you don't have to leave a comment if you'd rather not). If so, go to [www.ReviewFisher.com](http://www.ReviewFisher.com), click the blue button, "Get more reviews" and post the review. Will be much appreciated. No worries if you'd rather not."

Everyone will receive a Zappy Card for Google reviews. With Zappy Cards, getting Google reviews is quick and easy. The reviewer simply holds their cell phone next to the Zappy Card and they are then brought to our firm's Google review page. The reviewer posts the review on their cell phone, and they don't have to leave a comment if they'd rather not. This takes less than 10 seconds.

### Our Google Rewards Program

We have a number of rewards policies in [www.Fisherpedia.com](http://www.Fisherpedia.com) for Google reviews. You can pick the rewards of your choice. Our Chief Operating Officer, Vince, has generated more than 50 Google reviews and earned 5 paid days off. Through Vince's and Serena's efforts over the past 6 weeks, our firm's Google reviews increased from 621 to 715. That is amazing!

If you generate at least 50 Google reviews and our firm reaches 1,000 Google reviews by December 31, 2024, you receive a 4-day all-expenses paid trip to the destination of your choice. Keep track of the Google reviews that you generate and report them at our daily huddle. Everyone in our firm is eligible for this reward and there is no limit to the number of those who can receive it. Who's up for this challenge?