

ADVANCE PRAISE

“Lawyerist.com spearheaded the movement to build a community of solo and small firm lawyers striving to revitalize and revamp the practice of law. In a shockingly short time, the community Lawyerist.com built and the ideas it nurtured turned my practice on its head—all for the better. The Lawyerist.com team has organized an overwhelming number of aspirations into actionable steps that any solo or small firm lawyer can implement to dramatically improve the running of their firm.”

—MEGAN ZAVIEH, ZAVIEH LAW, GA; LAWYERIST
LAB MEMBER; GUEST ON LAWYERIST
PODCAST #110, #126, AND #164

“The team of Aaron Street, Sam Glover, Stephanie Everett, and Marshall Lichty are managing the amazing Lawyerist community that is not only helping small-firm lawyers nationwide learn how to be successful entrepreneurs, but making them enthusiastic about running their own businesses.

Twenty-five years ago, I left a large law firm to establish a solo immigration law practice. I had no business training and, consequently, I made a lot of mistakes in managing my practice. I've often thought that getting an MBA along with my law degree would have been pretty useful. Lawyer entrepreneurs today now have a pretty useful alternative to getting a business degree—Lawyerist. Whether it's attending their great conferences, joining one of its mastermind groups, getting one-on-one coaching, tuning in to its podcasts, consuming the fantastic content at Lawyerist.com—and now reading this book—today's lawyer entrepreneurs have the tools to become not just successful legal professionals, but successful business managers as well. Kudos to Aaron, Sam, Stephanie, and Marshall on this latest offering from Lawyerist.”

—GREG SISKIND, SISKIND SUSSER, TN; AUTHOR
OF THE LAWYERS GUIDE TO MARKETING ON
THE INTERNET; LAWYERIST LAB MEMBER;
GUEST ON LAWYERIST PODCAST #94

“Far more than a business book, The Small Firm Roadmap is a sanity manual. Many, many entrepreneurial attorneys live with burnout, anxiety, addiction, and broken relationships. But that doesn't have to be the case. If you want to run a successful firm and maintain your personal well-being, this is the book to read.”

—SHERRY WALLING, PHD, ENTREPRENEUR
PSYCHOLOGIST AT ZENFOUNDER, AUTHOR OF THE
ENTREPRENEUR'S GUIDE TO KEEPING YOUR SH*T
TOGETHER, GUEST ON LAWYERIST PODCAST #204

“The Lawyerist community is where passion for law firm excellence meets intellectual horsepower. The Lawyerist has curated a group of extraordinary attorneys with bold notions for the future of the legal practice and provided a space for practitioners to not only share but enhance their ideas together. The Lawyerist team has uncovered and evaluated every business, wellness, and design-thinking resource to create a unique and invaluable perspective on how law firms do and will continue to thrive in the future. The Small Firm Roadmap is an absolute must-read. If you are just starting your practice, or you are simply frustrated with the archaic traditions of the law firms of yesterday and ache for a more modern experience, this is the book you have been waiting for.”

—ERIN GERSTENZANG, EHG LAW FIRM, GA; LAWYERIST
LAB MEMBER; GUEST ON LAWYERIST PODCAST #117

“Everyone is always looking for ‘the answer’ for how to build a successful small firm, but nobody has had it, until now. This book is as close to ‘the answer’ as you will find. Spoiler alert: at the end you win big.

The recipe for building a successful firm has been a closely held secret of a few brilliant lawyers. However, after years of working with hundreds of firms, the Lawyerist team explains the keys step by step in this first-of-its-kind book. This is a million-dollar read you can’t afford to miss.

I read it. I did it. It works. This will be the new bible for law firms.

I've never been good at following roadmaps. But this Roadmap is one that every small firm lawyer can and should follow if you are serious about not just surviving but thriving in today's new legal economy. Read this book because it's best that you know how to drive toward success, otherwise you might wind up somewhere else."

—PATRICK PALACE, PALACE LAW, WA; FORMER
PRESIDENT OF THE WASHINGTON STATE BAR
ASSOCIATION; LAWYERIST LAB MEMBER; GUEST
ON LAWYERIST PODCAST #91 AND #169

"Lawyerist is the essential online resource for twenty-first-century solo and small-firm lawyers in the United States. The Lawyerist team balances practical guidance about the business of law with forward-looking insight on legal technology and socially responsible advice for tomorrow's community-minded lawyer. If you want to know what the future of small-firm law looks like and how to get there, The Small Firm Roadmap should be your counsel of choice."

—JORDAN FURLONG, LAW21, AUTHOR OF
LAW IS A BUYER'S MARKET, GUEST ON
LAWYERIST PODCAST #124 AND #185

"For most lawyers, business + law = 'blaw,' or some other painfully disinterested noise they generate from their visceral depths. But it's not really disinterest, it's more akin to fear—fear that this lawyer can't be that businessperson. And that's crap. Business is just another collection of precedent

and procedure that, once mastered, allows you to pursue business opportunities as deftly as legal ones. The Lawyerist folks understand this at their own visceral level—so much so that they decided to write a book about it. It’s their ‘summary judgement’ from over ten-plus years of helping thousands of lawyers replace ‘blaw’ with action.”

—MARK BRITTON, FOUNDER & FORMER CEO, AVVO.COM; GUEST ON LAWYERIST PODCAST #223

“It’s incredibly difficult to be a solo/small firm lawyer (trust me, I know—I practiced in a three lawyer firm for years). As if tending to case research, filing requirements, court deadlines, and communications from opposing counsel wasn’t enough, you need to take care of your clients’ needs and wants as well! It would also be wonderful if you enjoyed what you were doing in the process—but is that even possible? How much easier would all of this be if you had a clear roadmap for focusing on the things that you didn’t learn in law school, yet are crucial to the long-term success of your firm? Guess what—the team at Lawyerist has done the work for you. All you need to do is purchase, read, and implement the techniques in this book and you’ll be well on your way to creating the law firm you’ve always wanted.”

—JOEY COLEMAN, AUTHOR OF WSJ BESTSELLER NEVER LOSE A CUSTOMER AGAIN, GUEST ON LAWYERIST PODCAST #162

“In many ways, I’ve ‘grown up’ as a lawyer with Lawyerist—I remember when the platform launched not long after I cofounded a small firm, and have watched Lawyerist evolve into a tremendous resource for solo and small firm lawyers. I’m excited to see the Lawyerist folks share proven methods for building a fulfilling and sustainable practice through a holistic, client-centric focus with The Small Firm Roadmap. My twenty-plus years in practice affirms this approach!”

—PROFESSOR CAITLIN “CAT” MOON, DIRECTOR
OF INNOVATION DESIGN, VANDERBILT LAW
SCHOOL, GUEST ON LAWYERIST PODCAST #211

THE SMALL FIRM ROADMAP

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SMALL FIRM ROADMAP

A SURVIVAL GUIDE TO THE
FUTURE OF YOUR LAW PRACTICE

Lawyerist

AARON STREET, SAM GLOVER,
STEPHANIE EVERETT, AND MARSHALL LICHTY

Lawyerist

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THE SMALL FIRM ROADMAP

A Survival Guide to the Future of Your Law Practice

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For Kevin



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INTRODUCTION

WHAT DO YOU WANT OUT OF YOUR LAW PRACTICE?

Many lawyers we work with in our Lawyerist Lab program (we lovingly call them “Labsters”) have set clear goals for their small firms and have figured out how to make their goals reality.

For instance, Megan wanted a solo practice, but she also wanted to be able to take regular vacations without putting her practice on hold every time. To make that happen, she built a thoughtful, hardworking team around her. Now, even when she’s on a four-week (!) European vacation with her family, she’s able to come back and pick up right where she left off.

When Erin started her own practice, she realized she

would no longer have the luxury of a large team behind her. But while she didn't have the resources to staff a full team, she *did* have the resources to adopt a few tech solutions. Soon, she had learned to automate all the work of signing up a new client with just the press of a few buttons to work as effectively as she had with a team.

For Emily, the challenge was to find a way to represent clients with limited means. By being proactive and considering her ideal clients' needs, she launched a series of client-friendly solutions—such as limited-scope representation and payment plans. These days, her family law practice thrives entirely off flat fees. She offers clients a menu for every part of every case type. She knows *precisely* how much everything will cost and offers her clients the services they need at prices they can afford.

Lawyers like Megan, Erin, and Emily are paving the way for the future of law and of small-firm practice. But for every one of these success stories, there are twice as many stories of lawyers struggling to make their dream of successful small-firm ownership a reality.

Many lawyers are like Todd, who left his big-firm job to start his own practice. It didn't take him long to realize he had no model to build the kind of practice he wanted. Unsure how else to go about it, he essentially recreated the big-firm model and tried to graft it onto his small firm,

unnecessarily adopting all the same expensive tools and resources that his former employer used. All this did was create a big monster to feed with tons of overhead and endless administrative responsibilities. Despite his best intentions, Todd had left himself no opportunity for the sort of creativity and openness he'd originally envisioned for his firm.

Many of the lawyers we work with have shared similar stories. Buoyed by visions of a practice where they can do things their way, where they can have more flexibility and control over their practice, these lawyers set out to create something uniquely their own. Along the way, however, the challenges begin to mount:

- Their work feels unending.
- The demands of both firm management and client work never stop.
- They're under constant stress, always feeling like there is more to do.
- They have trouble finding new clients. The phone rings all the time, but most can't afford their fee. It feels like every lawyer they know is competing for the same 10 percent of clients.
- They have problems hiring and retaining staff and associates.
- Associates they do hire just can't seem to live up to their standards, leaving them to redo everything.

No wonder so many small-firm owners feel stuck. On the one hand, they're overwhelmed and struggling to stay above water. On the other hand, they don't know how to get the help they need to relieve that burden. As a result, these lawyers end up feeling frustrated and alone. They believe in their vision and their ability as lawyers, but they just can't shake one single, inescapable fact.

They have no idea how to run a successful law firm.

THE PATH TO SMALL-FIRM PRACTICE

If you're reading this book, you've probably encountered struggles of your own on your way to setting up and sustaining your own small firm. While the details of your challenges are unique to your journey, we've found that most small-firm owners have a lot in common. For instance, the majority became small-firm owners by following one of a few common paths:

- **The Default Option.** You went to law school, didn't get the job you wanted when you graduated, and set up your small firm because you had little other choice.
- **Plan B.** After working at another firm for a while, you decided you'd rather have your own firm instead.
- **Entrepreneurship.** From the get-go, you've been

hungry to build and grow your own thing. As soon as you could, you launched your own practice.

- **Deliberately Self-Employed.** You might not be an entrepreneur, working to master the craft of growing a business, but you know you'd rather work for yourself than someone else.
- **Legacy.** Either your parent or your mentor owned a small firm, and you've always known it would be your path too.

However you came to small-firm ownership, we're willing to bet that it was no less filled with uncertainty and frustration. Uncertainty about its viability or desirability. Frustration over a system that often struggles to accommodate what you want to build and frustration over a culture that's stuck in the past and unwilling to experiment to better serve clients.

Perhaps most frustrating of all is that you know exactly what the problem is; you're just unsure how to move yourself or your profession forward.

The fact is, whether explicitly or implicitly, most lawyers are discouraged from directing their own careers. We're presented a narrow field of options, each with a preprogrammed path that we're expected to follow. Once we graduate, we're expected to either hitch our futures to

a larger firm's wagon or start our own firm based on a traditional model.

Those choosing the latter option quickly face an important truth: we have little idea how to run a law firm, manage a business, market or sell professional services, bill clients, or earn a decent living.

Fortunately, there is a better way. You *can* own and build a thriving, client-centric law firm.

STANDARD SMALL-FIRM GOALS

Often when we ask lawyers what they want out of their practice, they state their goal in terms of clients, revenue, and billable hours. That's fine. But your goals can be so much more than that.

For some, their goal is working forty hours a week, not the sixty (or more) hours others often work. For others, it's about never having to choose between helping people and making money. For still others, it's about refusing to accept the model they've been given and creating a practice that works for *us* instead. These are reasonable, attainable goals that make us better at our jobs and create more fulfillment in our lives.

And yet, lawyers tend to think that these reasonable goals

don't apply to us—or at least they don't apply to us *right now*. Sure, they may *sound* like good ideas, but we'll worry about them later.

Your job is hard. We respect that. We respect that you have clients to serve and bills to pay. But the truth is, this mindset isn't doing any of us any good.

Look, we get it. We've each lived the lawyer trap ourselves and seen how damaging it can be for a healthy life. For each of us, there came a point in our legal career when we realized that the profession as it currently stands wasn't working for us.

For Aaron, it was seeing the huge disparity between two of his passions: business and law. An entrepreneur since he was a teenager, Aaron has a lifelong curiosity about growing good businesses. After graduating law school and entering the legal profession, he was frustrated by the disparity between the best practices of other businesses and the lack of business thinking in small law firms.

For Sam, it was the guilt he felt working from his laptop as he sat in the delivery room while waiting for his first daughter's birth. From that moment, he vowed to rethink the way he practiced law so that he could be fully present for his family when they needed him.

For Stephanie, it was the false choice between a career as a public interest lawyer or a career that actually made money. Resenting that choice but seeing no other option, she chose the latter. As this money-first mindset slowly began to consume her, she finally realized she could never truly escape her work. If she took off early on a Friday to enjoy herself for the day, the guilt of not billing would drive her right back to work on Sunday. Something had to change.

For Marshall, it was the slow realization that he could do more in the world. Being a good student had seen him through law school and landed him good jobs at successful firms. But despite his success, he wasn't satisfied. The firms he worked for were either ineffectively run or not set up for sustainable long-term success. Everywhere he turned, he saw a disordered system plagued with indifference and inefficiency. Convinced there was a better way, he set out to find it.

One by one, our paths led us to our work at Lawyerist. For over a decade, Lawyerist's mission has been to create a community centered around trailblazers like you to validate your work, help you refine your efforts, and share your story with others so they can learn from your journey and apply it to their own.

Driving this work is our belief in community. We believe

that the only way to create a new future for the legal profession is to build it together. Lawyers who surround themselves with mentors, coaches, and supportive peers will see this shared future and will work together to create it.

GETTING STARTED

We wrote this book to teach lawyers how to build successful, future-oriented, client-centered law firms. In solo firms and small practices across the country, lawyers are building a vision of the law that is empathetic, self-aware, and adaptable. This book will show you how to join this community and create a law practice that works for *you*.

This is not a book about how to build a law practice in the old model. The old model is broken. Instead, this book presents our vision for what a successful law practice *can be*. Whether you already manage a small firm or are considering starting one, this book offers you a path forward.

That said, this book is not a prescriptive, one-size-fits-all manual. There is no magic set of steps to implement in your firm that will guarantee success. This isn't a silver bullet. But it is a chance for a new beginning. *The Small Firm Roadmap* lays out a comprehensive set of tools and ideas you can implement in your own practice. But the details and execution of that process? Those are up to you.

Having the small firm of the future isn't about technology adoption. While it is important that you understand how to use modern tools, this is *not* a book about software tips. Nor is this a book about running a “cheap” practice. Finding cost-cutting opportunities can be great, but they are inconsequential if you're not focused on creating a client-centered experience and a sustainable, growing, and profitable business.

Finally, this book offers you the chance to build a practice that allows you to live the life you want and find joy in your profession. There is a lot of negativity and burnout in this industry, but it doesn't have to be that way.

Some of you may resist the ideas in this book or dismiss them as too good to be true. You may get through the first two or three chapters and decide that you'd rather stick with the status quo. And why not? After all, the status quo has worked fine for decades, right? Why shouldn't it work for you too?

Unfortunately, the status quo is no longer good enough. For reasons we will explore in part 1, the coming decade will see a perfect storm of social, economic, and technological changes that will profoundly affect how we do our jobs. In other words, change is coming whether we like it or not. We can resist this change and spend our entire careers playing catch-up, or we can use the Small

Firm Roadmap outlined in part 2 to become drivers of that change.

This isn't going to be easy. Change is often complicated and painful—especially for an institution as old and established as the legal profession. But change is *much more* painful when we aren't ready for it and don't understand it.

In the rest of this book, we'll help you find clarity about your personal and career goals as an owner of a small firm. We'll teach you the business and entrepreneurship skills you never learned in law school. We'll show you how to prepare for the coming disruptions in the legal industry. And we'll introduce you to a community of supportive peers and mentors who would love to help *you* create a better law practice.

Thank You!

Thank you for taking the time to read the first chapter of *The Small Firm Roadmap*. We hope you enjoyed the first few pages of the book and now have a sense for how the rest of the book might benefit you and your law practice.

Get a Copy of the Book

If you are ready to read the rest of the book, it is available for purchase in multiple formats on Amazon:

<https://www.amazon.com/Small-Firm-Roadmap-Survival-Practice/dp/1544504799/>

You can also learn more about the book on our website:

<http://lawyerist.com/roadmap/>

We're grateful for your support!

-Aaron Street, Sam Glover, Stephanie Everett & Marshall Lichy