

Creating and Teaching a Law Practice Management Course *Going Beyond The Norm*

CALI 2006 Conference for
Law School Computing

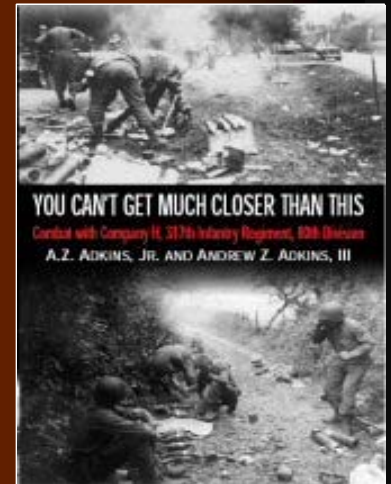
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Agenda

- Introductions
- Real World LPM
- Course Syllabus – My Viewpoint
- Course Materials
- Getting the LPM Course into the Curriculum
- Student Highlights
- Q&A

Andrew Z. Adkins III

- University of Florida Levin College of Law
 - Director, Legal Technology Institute
 - Associate Director, Technology Services
- Legal Tech Consultant – 17 Years
- Co-Chair, LegalTech Conferences
- Chair ABA TECHSHOW 2000, 2001
- Author
 - *WordPerfect Law Office Solutions (multi-author)*
 - *Computerized Case Management Systems*
 - *You Can't Get Much Closer Than This*
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UF Levin College of Law

- 1200 JD; 125+ LLM
- 65+ FT Faculty; 100+ Administrators, Staff
 - About 300 desktops; 50 laptops
- IT Falls Under Library
- IT Staffing – 10 (Computing, Media, Internet)
 - AZA splits time 50/50

- Total Physical Renovation 2004-2005
- Classroom Technology
- Mandatory Laptop
- Examsoft Exam Software
- Do Not “Publicly” Support Student Laptops

Demolition



Classroom Transition



Initial Questions

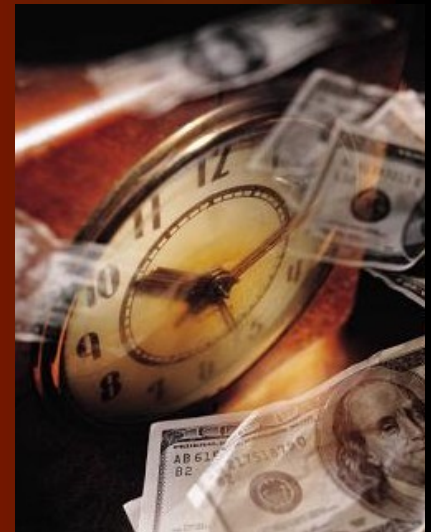
- Who's Here?
- Who's Teaching LPM?
- What Do You Want to Know?

Why an LPM Course?

- Recruiters
 - *"Don't you teach your law students anything?"*
- Alumni
 - *"I wished this type of class was taught when I was in law school."*
- Students
 - *"Why don't you offer any practice management courses?"*
- Faculty
 - *" Our mission is to teach the law, not to teach students how to be lawyers."*

LPM in the Real World

- Practice Management
 - Dealing with clients, attorneys
 - Dealing with the court systems
- Business Management
 - The law firm is a business
 - Office management



Course Requirements

- Attend 11 of 14 sessions
- Final Project
 - Can “partner” with someone
 - “Start a Law Firm”, or
 - “Work on a Specific Type Case”
- 1 Credit Hour, Pass/Fail
 - Proposed 2 Credit Hours, Graded

Course Syllabus

Course Syllabus

- Part 1: Basic Business Management
- Part 2: Practicing Law
- Part 3: Expanding Your Firm & Business

Part 1: Basic Business Management (2 classes)

- The Law Firm as a Business
- General Practice or Specialization
- Solo or Partnership (P.A., Subchapter-S, Corporation)
- Setting Fees

- Financial Management (Bank Accounts, Time Keeping, Accounting)
- Business Planning
- Office Location
- Facilities Management
- Insurance
- Initial Forms & Documents

Part 2: Practicing Law (10 classes)

- Litigation Practice Management
- Technology (Software & Hardware)
- Representing the Business Client and Real Estate Transactions
- Family Law
- Legal Research Resources
- Law Practice Management and The Florida Bar
- Record Keeping

Part 3: Expanding Your Firm & Business (2 classes)

- Client Development
- Marketing Your Practice
- Personal Development - Managing "You"
- Balance & Quality of Life Issues
- Common Pitfalls

Course Materials

- **How to Start and Build a Law Practice -**
Jay G. Foonberg, ABA
- **Florida Legal Secretary** (James Publishing)
- **Sample Worksheets**
 - Timesheet
 - Income & Expense Statement
 - Client Intake Sheet
 - Sample Client Invoice
 - Sample Chart of Accounts

Sample Client Invoice

ANDREW ASLE
BARRY BAND
CHARLES CASE
LAWRENCE STEPHENS
JAMES MARTIN

ABLE, BAND, CASE
123 MAIN STREET
ANYWHERE, USA
555-555-1212

VISIT US ON THE WEB:
WWW.ABCPRM.COM

September 3, 2005

James Bartholomew Williams
123 Elm Street
Gainesville, FL 32605

Matter No. 0235201

Professional Services

7/7/05	AZA	Draft initial Agreement for new corporation	1.0	\$300.00
7/12/05	AZA	Meet with client to discuss modifications to Agreement	.75	\$225.00
7/13/05	AZA	Telephone conference with board members to discuss corporate make up	0.5	\$150.00
7/20/05	AZA	Meet with Board of Directors of ABC Corporation to sign corporate documents and discuss setting up additional corporations	2.5	<u>\$750.00</u>
For professional services rendered			4.75	\$1,425.00

Expenses

7/7/05		Corporate Kit		\$175.00
7/13/05		Long distance telephone charges		\$23.00
7/20/05		Travel expenses to board meeting		<u>\$250.00</u>
Total Expenses				\$448.00
Total Services and Expense				\$1,873.00

Fees Discussion

- How many “normal” work hours/year?
- What is expected for new associates?
 - 1800 – 2200 “billable” hours/year
- You work for a law firm. You just settled a case for \$3M. How much of that settlement will you get?

Ethics Discussions

- If you're driving to a deposition, you bill that client for travel time.
 - If you're on the phone with another client, can you bill both the phone client and the travel client?
- You're a Probate attorney and are in conference with a client, who just lost her mother & father. She's very upset and hugs you for support.
 - Do you hug her back?

Final Project Deliverables 1/2

- Business Management
 - Timesheet (handwritten)
 - (2) Client Invoices (class time, class project)
 - Client Intake Sheet (completed with facts)
 - Retainer Agreement and Cover Letter
 - Business Plan
 - Initial Startup Costs
 - Income & Expense Statement for 12 months
 - Marketing Plan for 12 months

Final Project Deliverables 2/2

- Practice Management
 - Choose a “major” specialty
 - Choose 2 “minor” specialties
 - (3) Checklists required
 - Initial set of documents for case facts

Process & Faculty

- Course Proposal
- Pass muster with faculty
- UF Law LPM Course timeline:
 - Fall 2003 – 0 Credit
 - Fall 2004 – 0 Credit
 - Fall 2005 – 1 Credit, Pass/Fail
 - Fall 2006 – 1 Credit, Pass/Fail
 - Fall 2007 – 2 Credit, Grade (?)
- Partner with outside attorney

Issues to Resolve

- Students complain not enough credit hours for the work
 - We're working on 2 hours credit, graded
- How much technology to include in course
 - Some students want more, some less
- How much practical skills to include
 - Some faculty feel this class duplicates other courses offered

Student Highlights

- Fees Discussion(s)
 - What lawyers charge
 - What lawyers make
 - Number of hours to bill (i.e., quotas)
- Final Projects
- Guest Speakers
 - LOMAS
 - Outside Attorney(s)
 - Paralegal, Legal Assistant(s)
 - Vendor(s)
- Practical Worksheets
- Balance of Life Issues

Questions?

Thank You!

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