

UNIVERSITY OF FLORIDA COLLEGE OF LAW

Law Practice Management and Technology Course #6752

Syllabus

Spring 2021
Room HH - 285D
Tuesdays, 3:00-4:50 p.m. Two (2) Credit Hours

Office Hours:
Via Zoom
Wednesday 2:00-3:00 p.m. or by appointment

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COURSE DESCRIPTION & STUDENT LEARNING OUTCOMES

The legal profession and court system are rapidly changing, whether lawyers are ready or not. Innovative business structures and the consistent introduction of new technologies are changing the ways clients expect to be served. Today's client base is an educated market which expects communication and efficiencies unlike past generations have seen in this profession.

Also, more law school graduates are jumping into the practical (or business) side of the profession much faster than in the recent past. This is not only because of the current job market but because of expectations of current lawyers who have fallen behind the technology curve.

Finally, the recent COVID-19 pandemic has forced practitioners and the courts to utilize technology in ways that they never have before.

This class will help move each student forward in understanding the current realities of the legal profession and allow each student to hit the ground running upon graduation with practical skills that can be used regardless of the area of employment.

The class will not only focus on real-world applications, innovation and technology, but also the importance of collaboration to achieve optimal client service. Thus, there is an emphasis on the "firm" concept and group work. We will also have guest speakers from time to time.

After completing this course, students should have a better understanding of the business of practicing law. Specifically, how to organize and operate a law practice, utilize cloud computing and other technology platforms, market a law firm, and handle ethical dilemmas involving lawyers and clients. In addition, students should have a better understanding of how the practice of law has changed over the past quarter century and, in particular, over the past few years because of advancements in technology and the COVID-19 pandemic.

WORKLOAD/CLASS PREPARATION

Students should expect to spend, on average, approximately two hours preparing for every hour of class. Reading assignments are posted in the “Syllabus” and additional reading materials may be provided by Professors Glover and Thompson before class.

Nevertheless, the materials assigned for class are just the tip of the iceberg when it comes to available information online. As you work through projects, feel free to dive into other resources to make your class experience more meaningful.

LAW FIRM BUSINESS PLAN

The class will be broken up into groups or “law firms” with 4 or 5 members (or less depending on final class numbers) who will work together planning and structuring an innovative law practice throughout the semester.

The firms will complete various assignments as outlined below. Each firm will also create a comprehensive, written business plan for their law firm model. The business plan shall include, but is not limited to, the following:

- The name and legal organizational structure;
- Practice areas and clients to be served;
- The role of each lawyer;
- How lawyers will collaborate running the firm and serving clients;
- The compensation structure and funding sources;
- The firm’s technology platforms;
- How services will be delivered to clients;
- Staffing and outsourcing;
- A budget and marketing plan;
- How the firm will address cyber security threats;
- The role of mobile devices;
- The use of artificial intelligence; and
- Exit strategies for the lawyers.

An appendix to the business plan shall include the firm's operating or partnership agreement and each of the written assignments completed throughout the course.

The deadline for this final project business plan is April 13, 2021.

BAR ASSOCIATION INVOLVMENT

Each student shall also engage in at least two meaningful activities with The Florida Bar, American Bar Association, or any bar association during the semester. This could include, but is not limited to, attending virtual or in-person meetings, attending virtual or in-person events, participating in public outreach efforts, or writing an article for a bar publication, among other options.

Each student will prepare a 2-page written summary of the details of each event, including, but not limited to, a description of the event, the date, why they participated, and the benefit they received from the participation. Each write up should also include a summary of the interaction the student had with at least one other lawyer or judge per event. The write up shall be included in the appendix to the business plan.

GRADING

Each student will be graded based upon class attendance and participation, the timely completion of assignments, and the analysis and quality of the participation and content of written and oral projects.

Participation and Attendance: 25%

Class Assignments: 25%

Business Plan: 50%

This course follows the Levin College of Law's grading policies found [here](#).

The law school policy on exam delays and accommodations can be found [here](#).

ATTENDANCE

Attendance will be taken at each class meeting. Students are allowed one absence during the course of the semester. Students are responsible for ensuring that they are not recorded as absent if they come in late. A student who fails to meet the attendance requirement will be dropped from the course. The law school's policy on attendance can be found [here](#). **Please note: your final grade will be reduced for each class session missed beyond one class.**

Students registered for the in-person section must attend in person unless they receive approval in advance from the instructor to participate in class virtually. Students who do not comply with this policy will be counted as absent

STUDENTS WITH DISABILITIES

Students with disabilities who experience learning barriers and would like to request academic accommodations should connect with the Disability Resource Center. Click [here](#) to get started with the Disability Resource Center. It is important for students to share their accommodation letter with their instructor and discuss their access needs as early as possible in the semester.

ONLINE COURSE EVALUATION

Students are expected to provide professional and respectful feedback on the quality of instruction in this course by completing course evaluations online via GatorEvals. Click [here](#) for guidance on how to give feedback in a professional and respectful manner. Students will be notified when the evaluation period opens and may complete evaluations through the email they receive from GatorEvals, in their Canvas course menu under GatorEvals, or via ufl.bluera.com/ufl/. Summaries of course evaluation results are available to students [here](#).

HONESTY POLICY

UF students are bound by The Honor Pledge which states, "We, the members of the University of Florida community, pledge to hold ourselves and our peers to the highest standards of honor and integrity by abiding by the Honor Code. On all work submitted for credit by students at the University of Florida, the following pledge is either required or implied: "On my honor, I have neither given nor received unauthorized aid in doing this assignment." The Honor Code (<https://www.dso.ufl.edu/sccr/process/student-conduct-honor-%20code>) specifies a number of behaviors that are in violation of this code and the possible sanctions. Furthermore, you are obligated to report any condition that facilitates academic misconduct to appropriate personnel. If you have any questions or concerns, please consult with the instructor in this class.

COUNSELING AND WELLNESS CENTER

Contact information for the Counseling and Wellness Center: <https://counseling.ufl.edu/>, 392-1575; and the University Police Department: 392-1111 or 9-1-1 for emergencies.

Health and Wellness Resources:

- *U Matter, We Care*: If you or someone you know is in distress, please contact umatter@ufl.edu, 352-392-1575, or visit [U Matter, We Care website](#) to refer or report a concern and a team member will reach out to the student in distress.
- *Counseling and Wellness Center*: [Visit the Counseling and Wellness Center website](#) or call 352-392-1575 for information on crisis services as well as non-crisis services.
- *Student Health Care Center*: Call 352-392-1161 for 24/7 information to help you find the care you need, or [visit the Student Health Care Center website](#).
- *University Police Department*: [Visit UF Police Department website](#) or call 352-392-1111 (or 9-1-1 for emergencies).
- *UF Health Shands Emergency Room / Trauma Center*: For immediate medical care call 352-733-0111 or go to the emergency room at 1515 SW Archer Road, Gainesville, FL 32608; [Visit the UF Health Emergency Room and Trauma Center website](#)

COVID-19 RELATED PRACTICES

Many students will have face-to-face instructional sessions to accomplish the student learning objectives of this course. In response to COVID-19, the following policies and requirements are in place to maintain your learning environment and to enhance the safety of our in-classroom interactions. We may take noncompliance into account when grading students or determining if a student may remain in the course.

You are required to wear approved face coverings at all times during class and within buildings. Following and enforcing these policies and requirements are all of our responsibility. Failure to do so will lead to a report to the Office of Student Conduct and Conflict Resolution. You also will no longer be permitted on the UF Law campus. Finally, Dean Inman will also report your noncompliance to the relevant state board of bar examiners.

This course has been assigned a physical classroom with enough capacity to maintain physical distancing (6 feet between individuals) requirements. Please utilize designated seats and maintain appropriate spacing between students. Please do not move desks or stations.

Sanitizing supplies are available in the classroom if you wish to wipe down your desks prior to sitting down and at the end of the class.

Be mindful of how to properly enter and exit the classroom. Practice physical distancing to the extent possible when entering and exiting the classroom.

If you are experiencing COVID-19 symptoms (<https://www.cdc.gov/coronavirus/2019-ncov/symptoms-testing/symptoms.html>), please do not come to campus or, if you are already on campus, please immediately leave campus. Please use the UF Health screening system and follow the instructions about when you are able to return to campus. (See <https://coronavirus.ufhealth.org/screen-test-protect/covid-19-exposure-and-symptoms-who-do-i-call-if/>.)

Course materials will be provided to you with an excused absence, and you will be given a reasonable amount of time to make up work. (See <https://catalog.ufl.edu/UGRD/academic-regulations/attendance-policies/>).

RECORDINGS OF CLASS DISCUSSIONS

Students may not take, circulate, or post photos or videos of classroom discussions, whether they are in-person, hybrid, or completely online. Students failing to follow this rule will be referred to the College of Law Honor Code Council and the University's Office of Student Conduct and Conflict Resolution.

COURSE WORKLOAD & PREPARATION

Students should expect to spend at least two hours outside of class reading and preparing for every hour of class.

CLASS DEMEANOR

Please do not arrive late to class, leave early, or leave to take a break during class absent extenuating circumstances. Please turn off your cell phone during class. We reserve the right to lower your final grade if you engage in behavior that disrupts the learning environment for your classmates.

RECOMMENDED READING

[The Client-Centered Law Firm, by Jack Newton \(CEO of Clio\)](#)

In *The Client-Centered Law Firm*, legal technology expert Jack Newton offers a clear-eyed and timely look at how providing a client-centered experience and running an efficient, profitable law firm aren't opposing ideas. With this approach, they drive each other. Covering the what, why, and how of running a client-centered practice, with examples from law firms leading this revolution as well as practical strategies for implementation, *The Client-Centered Law Firm* is a rallying call to unlock the enormous untapped demand in the legal market by providing client-centered experiences, improving internal processes, and raising the bottom line.

CLASS SESSIONS

Week 1 (1/19/21): Introduction and Overview of the Course/Organizing a Law Practice

Discussion (Part I). We will review the current state of the legal profession and how this relates to running a law practice, and go over the expectations and components of the course.

Assignment (Part I).

- The Decade in Legal Tech: The 10 Most Significant Developments: [VIEW HERE](#)
- 2021 Report on the State of the Legal Market: [VIEW HERE](#)
- The Future Practice of Law: [VIEW HERE](#)
- If Times They Are a-Changing, Why Aren't Lawyers Too?: [VIEW HERE](#)
- Lawyering in the Star Trek Economy: [VIEW HERE](#)
- [Tech That Will Change Your Life in 2021 - WSJ](#)

Discussion (Part II). Organization is critical to the success of every lawyer. We will discuss selecting a practice area/practice areas, personal productivity and time management. We will also discuss the actual legal formation of a law firm.

Assignment (Part II).

- Selecting a Business Entity: [VIEW HERE](#)
- Selecting a Firm Name: [VIEW HERE](#)
- Rules Regulating The Florida Bar: [VIEW HERE](#)
- View Clio's 2020 Legal Trends Report: [VIEW HERE](#)
- The Middle Class, An Untapped Legal Marketplace: [VIEW HERE](#)
- The Industrial (Legal) Revolution: [VIEW HERE](#)
- Workplace Technology Will Change the Law Office of the Future: [VIEW HERE](#)

Week 2 (1/26/21): Organizing a Law Practice

Discussion. We will explore how client service has changed and innovative ways to deliver legal services. We will also discuss how ethics issues play into these newer services.

Assignment.

- Office Space vs. Virtual Office: [VIEW HERE](#)
- Ethics Informational Packet (The Florida Bar): [VIEW HERE](#)
- The Virtual Law Practice: The Future is Now: [VIEW HERE](#)
- How Working Remotely Helps Our Firm: [VIEW HERE](#)
- Customizing the Commodity of Legal Services: [VIEW HERE](#)
- Review the ABA Model Rules and The Florida Bar Rules and determine the applicable sections to mobile lawyering.

- Articles on Apps for Lawyers
 - [iPad Apps for Lawyers and Law Firms](#)
 - [Mobile Applications for Law Students and Lawyers](#)
 - [Apps for Lawyers](#)
 - [23 Best Apps for Lawyers](#)

Week 3 (2/2/21): Cloud Computing and Online Legal Practice Management Platforms

Discussion. We will discuss cloud computing from a lawyer’s perspective, both practical and ethical issues.

Assignment.

- Quick Start Guide on Cloud Computing: [VIEW HERE](#)
- The Law Firm of the Future: [VIEW HERE](#)
- Due Diligence Considerations for Lawyers Evaluating Cloud Computing Service Providers: [VIEW HERE](#)
- Using the Cloud Securely: [VIEW HERE](#)
- Florida Ethics Opinions on Cloud Computing: [VIEW HERE](#)
- Backup and Recovery: [VIEW HERE](#)
- Additional Articles and Videos on Cloud Computing:
 - [Legal Ethics Considerations for Lawyers Use of Cloud Computing Services](#)
 - [I am interviewing cloud providers. What questions should I ask?](#)
 - [What do I need to know about keeping my network secure?](#)
 - [How can I safely share files with a client over the internet?](#)
 - [Ethics in the Tech Age](#)
- Set up your firm Clio account, review the Terms and Conditions and Privacy Policy and be prepared to discuss the contents.
 - [Clio Academy](#)
- Create a free Dropbox.com account and explore the various features and concepts behind it. Review Dropbox’s Terms and Conditions in light of the ABA Model Rules.
 - [Dropbox](#)

Week 4 (2/9/21): Outsourcing/Staffing, Going Paperless, Legal Research & Other Law Firm Technology

Discussion. Every lawyer needs help in one way or another. We will discuss issues regarding staffing, choosing whether to go paperless, and advancements with legal research.

Assignment:

- How Outsourcing and Automation Can Benefit Your Firm: [VIEW HERE](#)
- ABA 20/20 on Outsourcing: [VIEW HERE](#)
- Going Paperless Articles:
 - [Advantages and Disadvantages of a Paperless Office](#)
 - [Paperless in 12 Steps](#)
 - [Paperless Chase](#)
- Legal Research Options:
 - [Westlaw](#)
 - [Lexis](#)
 - [Fast Case](#)
 - [Google Scholar](#)
- Telephones
 - [VOIP Telephones](#) that can operate anywhere you plug them into an internet connection
 - Virtual Phone Systems: [Vonage](#), [Ring Central](#), [Grasshopper](#) or [Virtual PBX](#)
- Data Storage & Backups
 - This can range from solutions that permit you to access files anywhere to pure backup solutions that protect your data from loss.
[Dropbox](#)
[Barracuda Online Backups](#)
[Carbonite](#)
[iDrive](#)
- The Promise of Blockchain in the Law: [VIEW HERE](#)
- Demystify Your Back Office Operations with Technology: [VIEW HERE](#)

Week 5 (2/16/21): Artificial Intelligence and the Law

Discussion. We will discuss how the development of Artificial Intelligence will affect various aspects of our personal and professional lives.

Assignment.

- Natural Language Processing: An Essential Tool for Attorneys: [VIEW HERE](#)
- Artificial Intelligence and the Practice of Law: [VIEW HERE](#)
- Siri, Esq.—The AI Robots are (not) Coming: [VIEW HERE](#)
- There's a Bot for That: [VIEW HERE](#)
- Don't Fear Artificial Intelligence, Embrace It: [VIEW HERE](#)
- Podcast: Why Efficient Lawyers Use Artificial Intelligence. [LISTEN](#)
- AI is a Lawyer's Technician, Not a Replacement: [VIEW HERE](#)
- ABA Votes to Urge Legal Profession to Address Emerging Legal and Ethical Issues of Artificial Intelligence: [VIEW HERE](#)

Weeks 6 & 7 (2/23/21 and 3/2/21): Marketing a Law Practice

Discussion. Naturally, client development and marketing of a firm's services are important to the survival of a law practice. With technology and social media, options are ever expanding. We will discuss ways to market a practice, including bar association involvement and ethics issues that go along with this issue.

Assignment.

- Understanding the Multiverse of Legal Marketing: [VIEW HERE](#)
- Mastering Local Search Marketing Is Critical to Your Firm's Success: [VIEW HERE](#)
- Make Sure Your Online Marketing Efforts Reflect Your Uniqueness: [VIEW HERE](#)
- Best Practices of Successful Law Firm Websites: [VIEW HERE](#)
- Getting Started with Email Marketing: [VIEW HERE](#)
- 5 Key Marketing Metrics for Law Firms: [VIEW HERE](#)
- Four Reasons Not to Collect Client Feedback: [VIEW HERE](#)

- The Power of Intelligence in the Business of Law: [VIEW HERE](#)
- Twitter for the Reluctant Lawyer: [VIEW HERE](#)
- How Much Social Media is Enough? [VIEW HERE](#)
- What's New in Social Media Marketing for Lawyers? [VIEW HERE](#)
- The Pros and Cons of Niche Practice Marketing: [VIEW HERE](#)
- Be the Missing Piece: Marketing Your Niche Law Practice: [VIEW HERE](#)
- Advertising and Ethical Considerations:
[Advertising Regulation—The Florida Bar](#)
- Online Ads
[Google Ads](#)
[Bing Ads](#)
- Online Reviews & Profiles
[AVVO](#)
[Martindale](#)
[Lawyers.com](#)
[LinkedIn](#)
- Websites
[Squarespace](#)
[Wix](#)
[Weebly](#)
[Jimdo](#)
[IMCreator](#)
[Webs](#)
- Referrals
 - Most lawyers will agree that a personal referral is the best way to build your practice. It takes time to build these referral sources and the best way to do that is to do good work and have that work recognized by other lawyers, clients and business people. This has always been frustrating for new lawyers, because how are you supposed to get these referrals if you struggle to get the legal work to show how great you are? Unfortunately, this sometimes takes a little while, but it's good to know what you can and cannot do when it comes to a referral from another lawyer. For fee sharing information, be sure to reference the [Rules Regulating The Florida Bar](#)

- Local Bar Associations
 - Referrals from other lawyers may be your best asset once your name gets out there. A great way to meet lawyers of a diverse age range and practice group is to attend a local bar event. In addition to having monthly lunches, CLEs, speakers and a wealth of other resources, it is also a wonderful networking opportunity. Most Local Bar Associations also have a Young Lawyers group so you can engage with your local peers as well. These associations typically have an annual fee, however some groups offer lower rates for newer or government lawyers, so don't be afraid to ask! For a list of Local Bar Associations throughout Florida, [check out this link](#).

- Local Bar Referral Services
 - Often times the best referral sources are other local lawyers who have seen you in action and think of you when referring out a case. Joining the local bar association in your area is a great way to meet other local lawyers of all ages, practice areas and experience levels. Who knows, you might meet a new referral source, business partner, mentor or friend simply by attending some of their events! Depending on where you practice, your local bar association might be more or less active, but getting involved is a great place to start! Some local bars even have their own referral networks! Please see the current local Bar referral services throughout the state listed below:
 - [The Florida Bar Lawyer Referral Service](#)
 - [Palm Beach County Bar Association Lawyer Referral Service](#)
 - [Dade County Bar Association Lawyer Referral Service](#)
 - [Broward County Bar Association Lawyer Referral & Information Service](#)
 - [Hillsborough County Lawyer Referral & Information Service](#)
 - [St. Petersburg Bar Association](#)
 - [Clearwater Bar Association Lawyer Referral Service](#)
 - [Lee County Bar Association Lawyer Referral Service](#)
 - [Collier County Bar Association Lawyer Referral Service](#)
 - [Tallahassee Bar Association Lawyer Referral Service](#)
 - [Jacksonville Bar Association Lawyer Referral Service](#)
 - [Orange County Bar Association Lawyer Referral & Information Service](#)

- Pro Bono/Low Bono Work
 - Doing pro bono work is not only rewarding, but a great way to gain experience and meet people in your community. The Florida Bar is currently reviewing and expanding its pro bono services and working to provide a greater access to justice. If you would like to learn more about pro bono work or would like to participate in a variety of programs, you can find more information at the links below:
 - [The Florida Bar: Pro Bono/Legal Aid](#)
 - [FloridaProBono.org](#)

- American Inns of Court
 - Most areas throughout the State have an established American Inns of Court. Inns are designed to “promote the goals of legal excellence, civility, professionalism, and ethics.” In a time when professionalism can be lacking, Inns can be an important bridge between opposing lawyers, judges and government lawyers with whom you might not practice. To find out more information about the American Inns of Court and to find an Inn near you visit their website at <http://home.innsofcourt.org/>

- Sponsorship
 - If you are targeting your legal services to a specific market, or have an interest in an event, either as a participant or spectator, consider sponsoring the event as a way to let others in the community know that you have opened an office in the area. Many events advertise on merchandise, the radio, in the local paper, news or social media, allowing your sponsorship of a single event to reach potential clients through several different news mediums.

- Print, Television & Billboards
 - Locally printed and distributed magazines can be an effective way to reach a local target market. These magazines could be recapping events and people in the area, or related to a specific industry, i.e. medical, construction, marine, etc. If you know you would like to represent clients in a specific industry, putting your advertising dollars to work in a specific area can be beneficial. Additionally, local television advertisements or well-placed billboards can gain you great name recognition. However, they will likely also cost far more than you might be willing to spend when you are first getting started, but may be a good investment a few years down the road!

- Local Civic & Business Groups
 - A great way to learn about your community and the businesses that serve the community is by joining a local business group. You might consider joining the Chamber of Commerce, Rotary, a business roundtable, or an industry specific group if your practice concentrates on a specific industry. Not only will you be meeting potential clients, but you will also be contributing to your community.

- Business Cards
 - Again, the internet offers a wide range of designs and price points for business cards, so first decide what is right for your business. Including both a phone number and e-mail address is advisable in order to give potential clients an easy means of contacting you. To find some quick and easy places to order business cards in various quantities check out these online resources:
 - [Vistaprint](#)
 - [Moo](#)
 - [Got Print](#)
 - [Jukebox Print](#)

- Lawyer Referral Services
 - Paid online or brick and mortar referral sources can be fraught with peril: proceed with caution! There are questionable referral services out there, so do your research before you sign up for any service provided by a private vendor: [VIEW HERE](#)
 - Qualifying Provider Rule: [VIEW HERE](#)
- Social Media
 - The social networking revolution has impacted the legal world as well. In the beginning, it was the wild west, but it has slowly but surely become more regulated by The Florida Bar. While social media can be an impactful way to reach potential clients, be wary of potential pitfalls. Check out The Florida Bar's guidelines below: [Guidelines for Social Networking Sites](#)
[Guidelines for Video Sharing](#)
- If you do not have one, create a personal Twitter account and follow at least 20 lawyers/thought leaders who discuss the future of the legal profession, law technology and/or marketing.
- Create a comprehensive LinkedIn profile that will become your professional bio.
- Send your Twitter handle and LinkedIn profile to Professors Glover and Thompson before the start of the **2/23/21** class.

Week 8 (3/9/21): Initial Law Firm Presentations

Assignment. Each group or firm will give a 10-minute presentation on the following three topics: (1) An overview of the firm (name, structure, location(s)); (2) Types of clients that will be served (both practice area and method of delivery - i.e., the technology); and (3) How you will market the firm. Each member of the firm must be a part of the oral presentation. The group will turn in the materials used during the presentation (PowerPoint, Keynote, etc.).

Week 9 (3/16/21): Necessary Documents & E-Filing

Discussion. We will discuss how to operate a trust account, e-file, and access the “basic” documents you will need to start your law practice.

Assignment.

- Forms & Agreements
 - Once a client retains you on a matter you need to be sure your representation is clearly laid out in a written agreement and in compliance with the Rules regulating The Florida Bar.
 - The Rules Regulating The Florida Bar require different types of fee agreements for different forms of representation. Remember, if you plan to represent a client on a contingency fee basis, the Rules require the agreement to be in writing. Before having that first client sign on the dotted line, review Rule 4-1.5 in detail.

- After the client is signed up and representation begins, or ends with a declination letter, additional agreements, letters, and forms will be necessary to ensure your business runs smoothly.
- The Florida Bar has created A Handbook to help lighten the load. While The Florida Bar has not adopted any of the forms provided as “official forms,” they are an excellent starting point to creating your own forms to cover your specific clients and their unique matters. The available forms range from client communications, client intake, fee agreements, declination letters, financial, marketing and even personnel. These materials are available [HERE](#).
- Pleading Forms
 - If you are on the hunt for pleading forms, elements for certain causes of actions or some additional research on what it will take to prove your case, check out these resources:
 - If the cause of action is statutory, check out the [Florida Statutes](#) first.
 - [Standard Jury Instructions](#) provide a wealth of information when trying to determine what is necessary to prove your case.
 - [La Coe’s Pleadings Under the Florida Rules of Civil Procedure](#) (the most recent version is pricey so hit your local law library or look for an older version prior to purchase).
 - When first starting out, the idea of not “reinventing the wheel” is certainly tempting, and at times, necessary. But, always remember the risks of using someone else’s forms as fee agreements, pleadings, contracts or any other document will fall on you. Be sure you do your homework, check the Rules Regulating The Florida Bar and don’t be afraid to ask others what they have done in similar situations (once you have done your own research.)
- E-Filing
 - E-Filing Resources for Florida Lawyers: [VIEW HERE](#)

Week 10 (3/23/21): Business of the Law (financials, trust accounting, insurance, etc.)

Discussion. Whether or not lawyers understand how to run a business, running a law practice is running a business. We will discuss fee structures, financial and insurance issues, trust accounting and other concepts to keep a practice running successfully.

Assignment.

- Managing Cash Flows and Bottom Line Financial Health: [VIEW HERE](#)
- It’s About Time: How to Record and Bill More of It: [VIEW HERE](#)
- NYC Bar addresses Bitcoin as payment for legal services: [VIEW HERE](#)
- ABA Model Rules:
 - Read ABA Model Rule 1.5: [VIEW HERE](#)
 - Read ABA Model Rule 1.15: [VIEW HERE](#)

- Articles about Malpractice Insurance
[Malpractice Insurance](#)
[6 Things Solo Practitioners Should Know About Legal Malpractice Insurance](#)
- Trust Accounting
 - Where Do You Start?
 - First, read Chapter 5, Trust Accounting, The Rules Regulating The Florida Bar:
 - [5-1.1 Trust Accounts](#)
 - [5-1.2 Trust Accounting Records and Procedures](#)
 - Practice Resource Institute
 - Then, check out the materials and forms on The Florida Bar's Legal Fuel website. This webpage addresses the creation of trust accounts, management, and applicable rules:
 - [Forms](#)
 - Open Your Trust Account
 - After you have learned the rules, open your trust account.
 - Don't forget to verify your account is titled properly:
 - The Bar now requires all law firms to have a Trust Account Plan.
 - Create Your Trust Account Plan
 - Don't forget to fill out for your trust account compliance certificate, which can be found on your Annual Fee statement.
 - Your Trust Account is set up and ready to accept deposits. Now, make sure you know the rules. Here are some helpful tips:
 - [Commonly Asked Questions about Trust Accounts](#)
 - Reconcile Your Trust Account
 - After your Trust Account has been opened for one month, you need to make it a habit to reconcile your Trust Account. And then reconcile your Trust Account every month thereafter. Check out The Florida Bar's Website for templates, spreadsheets, and helpful information to make trust reconciliation fast and simple.

Week 11 (3/30/21): Firm Policies/Procedures & Cybersecurity

Discussion. A well-run law firm requests internal processes and procedures. We will discuss ways to develop and implement policies and procedures for innovative law firms. We will also discuss cybersecurity issues for your law firm. Please read/view the following before class:

- Law Office Policies & Procedures: [VIEW HERE](#)
- Cybersecurity and Email Encryption 101 for Lawyers (webinar): [VIEW HERE](#)
- Law firms must manage cybersecurity risks: [VIEW HERE](#)

- Prepare, practice, protect: A strategy for defeating cyberthreats to lawyers: [VIEW HERE](#)
- Law Firm Cybersecurity Audits: Getting to Good: [VIEW HERE](#)
- Think Your Cybersecurity is Up to Snuff? Don't Bank on It: [VIEW HERE](#)
- Cyberattack Recovery: Easier Than You Think: [VIEW HERE](#)
- A podcast link on risks inherent with using free email and other free business services: [Did You Really Read Those Terms of Service? - Legal Talk Network](#)

Assignment. Each firm will prepare (1) a written social media use policy; (2) a written client intake and matter set-up procedure; and a (3) cyber security policy. These will be sent to Professors Glover and Thompson no later than **3/29/21**.

Week 12 (4/6/21): Remote Proceedings in the Age of COVID-19

Discussion. In the wake of the COVID-19 pandemic, courts and litigants have been forced to quickly adapt to unprecedented and ever-changing circumstances. One of the primary difficulties associated with the COVID-19 pandemic and faced by all sectors of society is the prohibition of large gatherings and person-to-person contact. Because traditional court proceedings require in-person gatherings—particularly jury trials where the public and the press are generally entitled to attend—many cases have suffered delays since the implementation of mandatory shelter in place orders and declarations of judicial emergencies across the country. In response, courts are implementing measures that will enable those cases to move forward. One of those measures is the use of remote video testimony.

- [Courtroom changes due to pandemic will stay \(floridatoday.com\)](#)
- [Report Out Today On 'Zoom Courts' Raises Privacy and Due Process Concerns | LawSites \(lawsitesblog.com\)](#)

Assignment. Each group will be sent a unique situation that their firm will encounter with a client or clients. The group will create a written response to how the situation will be handled, including the role of each team member, solutions, road blocks and citations to relevant ethics issues. We will discuss each situation and the group responses in class. Each group should be prepared to present their response and handle questions on the same. The written response must be sent to Professors Glover and Thompson no later than **4/5/21**.

Week 13 (4/13/21): Presentation of Final Projects

Final projects must be sent to Professors Glover and Thompson before the start of this session. Each group will be prepared to present and discuss an overview of their firm and how they derived their law firm plan, including the challenges.