LI23: Business by Building Up Your Attorneys
Presenter: Bryant
Building Business by Building Your Attorneys

Presenter: Katie Bryant CLM
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or 480-461-5345
Our Story
• Full service firm
• Hourly, contingent and flat fee
• 75% of clients are individuals - "one and done"
• Old School mindset
Old School Mindset
I am not sure if I will be able to sit thru implant surgery tomorrow.
On Jan 22, 2019 11:46, tbdally@udallshumway.com wrote
In an email, you will find the agenda and updates for tomorrow's meeting.
Please let me know if you will not be attending.

Katie J. Bryant, CLN
Executive Director

You've been awarded scoring values brochure for 2012
http://www.udallshumway.com/proceedings/
Our Problems

- Excessive time on contingency matters
- Unhappy clients - high collections, high write-offs
- Little to no "real" business development by attorneys other than equity partners
- Little to no community involvement
- No incentive to be a good corporate citizen
- Unhappy associates - high stress, no work/life balance
Dear Timekeepers,

As you know, one of my assignments on management committee of the firm is to monitor the eligible hours of Timekeepers, evaluate their performance, and make sure that their time sheet is submitted on time. Here is how I do this so far:

1. I track the time sheet of each Timekeeper and make sure that they submit their time sheet on time. I have tracked the time sheet of each Timekeeper and have found that they are submitting their time sheet on time. This has helped me to ensure that the firm gets the best out of their employees.
2. I have also found that the Timekeepers are submitting their time sheet on time. This has helped me to ensure that the firm gets the best out of their employees.
3. I have also found that the Timekeepers are submitting their time sheet on time. This has helped me to ensure that the firm gets the best out of their employees.

In 2015, we had 29 timekeepers, 12 of which were partners. The performance of the timekeepers was evaluated as follows:

- 25 of the 29 timekeepers met or exceeded their billable hours and did not meet the target of 1,000 hours.
- Three of the 12 partners exceeded their billable hours and met the target of 1,000 hours.
- One of the 12 partners did not meet the target of 1,000 hours.
- The remaining 13 timekeepers met or exceeded their billable hours.

Based on the above information, I would like to make some observations:

- Our performance as a firm is not as good as we would like. We have exceeded the target of 1,000 hours for all partners and 25 of the 29 timekeepers.
- The performance of the timekeepers is not as good as we would like. We have exceeded the target of 1,000 hours for all partners and 25 of the 29 timekeepers.
- The performance of the partners is not as good as we would like. We have exceeded the target of 1,000 hours for all partners and 25 of the 29 timekeepers.

I would like to make some recommendations:

- We need to improve the performance of the partners. We have exceeded the target of 1,000 hours for all partners and 25 of the 29 timekeepers. We should encourage them to work harder.
- We need to improve the performance of the timekeepers. We have exceeded the target of 1,000 hours for all partners and 25 of the 29 timekeepers. We should encourage them to work harder.
- We need to improve the performance of the partners. We have exceeded the target of 1,000 hours for all partners and 25 of the 29 timekeepers. We should encourage them to work harder.

Sincerely,
[Signature]

[Name]
[Position]
Resources, Reassurance and Perseverance

- Provide resource after resource about the negatives of incentivizing billable hours

- Provide resource after resource about the financial benefits which will come from having happy lawyers

- Reassurance that hours will still be worked and therefore money made
Our New Vision and Approach
What are we really trying to accomplish with our bonus system?
Happy Clients
Happy Attorneys
Strong Future
Incentives
Client Satisfaction

- Superior work product
- Efficient Service to clients
- Responsiveness
- Goes beyond the call of duty
- Client Feedback
Client Development

- Content creation for website and blog
- Content creation for other publications
- Presents at seminars/conferences
- Makes regular contact with potential referral sources
- Originates new matters
Community Involvement

- Service on committees and non-profit boards
- Pro bono service (outside of family and friends)
- Volunteer for charitable organizations
Good Corporate Citizen

- Team Player
- Collaborative
- Meets production expectations
- Meets time and billing deadlines
- Efficient use of staff (i.e.: low OT, leveraging of paralegals)
- Efficient use of firm resources
- Attends meetings
- Monitors AR (low collections, minimal write-offs)
Production

• Will vary by attorney according to goals set at the beginning of the year
• Must be at goal or above to earn points
Strong Future

Annual Plan of Work

- Production Goals
- Professional Development Goals
- Business Development Goals
This document is to assist you in serving as a blueprint to help you become a successful attorney individually, with your practice group, and with the firm.

**Productivity Goals**

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<th>Annual Goal</th>
<th>May 31</th>
<th>Oct 31</th>
<th>Total</th>
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<td>New Matters</td>
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Success will be measured using statistical information from our time and billing system. It will be updated semi-annually.

**Professional Development Goals**

List one to three goals for your professional development (honors, appointments, certifications, specialized training, substantive legal knowledge, business and management skills, client development, intraoffice team development, servicing of new clients, etc.):  

1. Healthier overall lifestyle – work/life balance  
2. Consistent time entry  
3. Improve organization with Lily’s assistance

**Business Development Goals**

What do you want to accomplish? List your top three goals for your business and client development efforts in the coming year and beyond.

1. AASBO speaking  
2. Develop referrals (cross selling) from AZ Hispanic Chamber of Commerce/Latina Business Enterprise  
3. Redesign LinkedIn profile
Collaboration and Ideas
Sharing and Caring
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