



WSBA

Lawyer Services Department

The Lawyers Assistance Program (LAP) promotes the health and well-being of WSBA members. Services include education, referrals, and direct confidential mental health and addictions counseling. We offer services to Washington State lawyers, judges, and third-year law students.

Call toll free at 800-945-WSBA (9722), ext. 8268 or locally 206-727-8268.

Job Seekers

Monthly Job Seekers Group—Guest speakers present on current methods of branding oneself as a lawyer to navigate the job hunt. This group meets the second Wednesday of every month at noon.

Weekly Job Seekers Group-This group provides an added level of accountability, strategy, and support unavailable at the monthly group. Groups are limited to 10 lawyers and meet for 8 weeks.

Confidentiality

Under **APR 19 (a)(b)**, confidential communications between a lawyer-client and staff or peer counselors of the Lawyers Assistance Program shall be privileged against disclosure without the consent of the lawyer-client to the same extent and subject to the same conditions as confidential communications between a client and psychologists.



WSBA

Lawyer Services Department Broadcast Email

This e-mail was sent by the WSBA Lawyers Assistance Program (LAP) to all active lawyers in the Puget Sound area. The LAP is a confidential program [APR 19(a)(b)] that provides individual, group, and phone counseling to lawyers. LAP can be reached at 206-727-8268. We are located at the WSBA at 1325 4th Ave., Fl. 11, in downtown Seattle. Our website is www.wsbalap.org.

Out of work? Tired of searching? LAP can help you with the process. Beginning Tuesday, January 27 at 10:30 a.m., we will begin hosting a Weekly Job Search Group: Goal Setting and Support. This group will involve setting goals, staying on track, and obstacles to job hunting. Participation will be limited to 10 people, and we will meet weekly for 8 weeks on Tuesdays at 10:30. If you are interested, contact Dan Crystal, Psy.D., at 206-727-8267 or danc@wsba.org

Our Monthly Job Search Group: The Basics provides job search best practices and strategies. This group is led by Rebecca Nerison, Ph.D., and meets the second Wednesday of each month at noon on the 6th floor of the WSBA. The next group is Wednesday, January 14 from noon to 1:30. No reservation is needed.

We are also forming groups addressing the following issues:

- Lawyers considering career transition.
- Senior lawyers addressing the next stage of their career.
- Drug/alcohol groups for younger and older lawyers.

Please contact us at 206-727-8267 if you are interested so we can put you on the list for one of these groups, or call us if you have any questions.



WSBA

Lawyer Services Department Weekly Job Seekers Group Email

Dear Job Seekers,

We have heard from 35+ lawyers interested in taking part in our Weekly Job Seekers Strategy & Support group. It appears that we have tapped into a major need facing lawyers during this economic crisis and WSBA wants to play an active role in getting your career moving in the right direction.

If you are receiving this email, you are one of the 10 lawyers chosen for this group. I should mention that this group will be \$40, which amounts to \$5 a session. We are expecting lawyers in this group to commit to all 8 sessions and to pay up front. All Job Seekers are encouraged to attend Rebecca Nerison, Ph.D.'s Monthly Job Seekers Informational Group. The next session is Wednesday January 14 from 12:00-1:30. No appointment is required. Dr. Nerison will co-lead the weekly group with me.

Also, group attendees should purchase a copy of *What Color is Your Parachute*, by Richard Bolles. This is a wonderful book with great, up-to-date, nuts and bolts strategies for finding work. A new paperback copy costs \$12 on amazon.com, & used copies from the last 5 years cost less. Feel free to begin reading and completing the exercises in this book in anticipation for the group.

I would like to remind you that all counseling services provided by the Lawyers Assistance Program are confidential, as covered in APR 19. We ask that you keep in mind the privacy of other members of the group as they share their experiences.

I have attached to this email some job search websites and a guide to Informational Interviewing. Also, pasted below are tips and tricks Dr. Nerison shares in her monthly group. I received a large number of responses in a short period and am sorry that in some cases this email has been my only response. In the weeks ahead, I am available for further contact as the group approaches. Also, please email a reply confirming your intention to attend this group. The group is on Tuesday January 27 from 10:30-11:45. The Washington State Bar Association is at 1325 4th Ave between University and Union. We are on the 11th floor on the right elevator bank. If you turn left out of the elevator, we're at the end of the hall. I look forward to meeting you.



WSBA

Lawyer Services Department Job Search – and Career Development – Best Practices Rebecca Nerison, PhD and Dan Crystal, PsyD

We cannot stress enough the importance of connecting with people and fostering relationships in the community and/or area of law in which you want to live and work. While it is possible to get a job by applying for positions you find on the Internet, the probability of doing so is low. The same is true for mass mailings of your resume. Use the Informational Interview to connect with people. We have a great handout of this we can email to you, but here is...

The Information Interview Process in a Nutshell:

1. How did you get into this work?
2. What do you like about it?
3. What are some of the challenges associated with it?
4. Who else should I talk to about this?

The five best and worst methods of job hunting from *What Color is Your Parachute 2008* by Richard Bolles (pp.11-17). If you haven't done so already, find a copy of this book – preferable from the past 5 years – and follow the author's advice.

Worst:

1. Using the Internet (4-10% success rate)
2. Mailing out resumes to employers at random (7%)
3. Answering ads in professional or trade journals appropriate to your field (7%)
4. Answering local newspaper ads (5-24%)
5. Going to private employment agencies or search firms (5-28%)

Best:

1. Asking for job leads from: family members, friends, people in the community, staff at career centers – especially undergrad and law school (33% success rate)
2. Knocking on the door of any employer or office that interests you, whether they are known to have a vacancy or not (47%)
3. By yourself, using the phone book (or Martindale-Hubbell) to identify subjects or fields of interest to you in the town or city where you want to work, and then calling up the employers listed in that field to ask if they are hiring for the type of position you can do and do well (69%)
4. In a group with other job hunters – a kind of “job club” – doing #3 (84%)

5. Doing a life-changing job-hunt involving a) identifying skills you most enjoy doing, b) identifying job environments in which you best fit, and c) identifying names of firms that do what you want to do, the names of the people there with the power to hire you, how to best approach that person and demonstrate your skills, and how you would be part of the solution to their problems (rather than part of the problem) (86%).

Use up to FOUR of the 16 job hunting techniques describe in Parachute, but no more. And remember that job hunting is an art (not a science) that you'll use over and over again. And remember that luck is a factor. Engaging in the best methods of job hunting – Persistently and Patiently – will provide more opportunities for luck to occur.

Must-Read Book #2 = *Ask the Headhunter* by Nick Corcodilos

Contains invaluable information about the job search process as well as employment interviews

Must-Read Book #3 = *Never Eat Alone* by Keith Ferrazzi

Connect with people like a pro. Your career depends on your ability to do this.

A Word About the Experience Issue – For Those Who Lack It:

There are at least two antidotes to the problem of lack of legal experience. The first is – obviously – to get some! Get experience any way you can, such as volunteering at legal clinics. This may take some imagination, since I've learned in the last week that the King County Legal Clinics have more volunteers than they can use! Other ideas: volunteer at agencies or organizations of interest to you; work on a project for a lawyer for free; work for a lawyer on a contract basis; do legal work for family or friends. If you end up doing the latter, be sure to connect with a few experienced lawyers who can be available to answer your questions and guide your efforts. Actually, the experience issue is in itself an excellent informational interview question. AFTER you've had your interviewees talk about themselves, try asking how they would go about getting experience if they had none.

The second antidote is to locate employers who care more about hiring a good fit than about specific experience – who want to train their lawyers to do things their way. Again, an excellent informational interview question in terms of locating such employers.

Last – A Word About Motivation:

It's obvious that most of the "Best" ways to look for a job involve talking to people you don't yet know. Your desire to do this falls somewhere on a continuum between Exciting and Excruciating. If you tend toward the latter end of the continuum, you have a few choices:

- a) Stick to responding to ads or sending inquiry letters. Your job search will probably take longer, but you might eventually be successful.

- b) Try interviewing people via email. This might actually work better for introverted interviewees. I'd like someone to try this method and report back.
- c) Give yourself permission to "try on" the role of interviewer, much in the way you play many roles as a lawyer. Introverts can play roles as well as extroverts. In fact, the author of the Parachute books, Dick Bolles, is a Super Introvert. He can't, by his own admission, engage in small talk to save his life. However, he's an outstanding teacher and has no problem giving speeches to 10,000 people at a time. He is comfortable in the role of teacher. If you can become even a little more comfortable with talking to people about THEIR lives, you will open up opportunities for yourself that will otherwise not exist. Remember, it's all about them.

If you find yourself avoiding doing the things you need to do to help yourself, consider the possibility that emotions such as anxiety, depression, and/or anger (to name a few) are influencing your behavior in unproductive ways. Consider getting some professional help to deal with these feelings because they have the power to sabotage your best intentions. They also tend to be visible to others. Call the Lawyers Assistance Program at 206.727.8268 to make an appointment or get a referral.

Resume Reviews Available

Ray Hazen, a peer counselor in the Lawyers Assistance Program, volunteers his time to review resumes. If you'd like a fresh pair of eyes and perspective on yours, contact Ray at rdhazen@hctc.com.

Weekly Job Seeking Strategy and Support Group

We are running weekly groups to lend more support to people in the process of finding jobs. If you would like to participate in such a group in the future – and you have not yet talked to Dr. Dan Crystal and put your name on the waiting list – please contact him at danc@wsba.org.

Attend the Monthly Job Seekers Informational Group each second Wednesday of the month at noon at the Bar offices. No RSVP needed. Let us know if you want to attend telephonically – 206.727.8268.



WSBA

Lawyer Services Department Cover Letters and Resumes

Step One-Research

- Read job descriptions very carefully and address every point you can through examples in your previous experience demonstrating you're a good fit. You are re-packaging yourself as a lawyer for every different job lead.
- If it's not a posted position but one you've learned about through networking, learn as much about the job as possible. Meet people who work there that can describe the job. The various responsibilities, the work environment, etc.
- Learn about the firm on the internet and other resources, trying to find facets of that company in which you match, or have interest. Showing that you have done your research sets you apart.

Step Two-Tailor Your Resume and Cover Letter to the Job Description.

- Use objective as opposed to subjective criteria in explaining your value to a firm. You don't need to explain that you are hard working, diligent, a leader, thoughtful, team player, a good communicator, etc.
- Rather, let your resume demonstrate that:
 - Managed a team* addressing x,y,z. (proves that you are a good communicator, leader).
 - Brought in \$x on accounts related to x,y,z (proves that you are hard working).
- Have a *Super Resume* of several pages of *every* job you've worked, organization or group you've served with, skills you've achieved, etc. This is a self-esteem buoy as you remember everything you *have* done. It's also the resource from which you will tailor your *one-page* resume.

Step Three-Writing the Cover Letter

Paragraph One-2-3 sentences.

- Explains *why* you're writing them. Be direct. *John Doe, a partner at XYZ recommended that I contact you.* Put the connection right up front. You have to assume they're skimming, so be direct.
- Explain your experience in one or two relevant areas and believe you would be a good *fit* for their needs. This word "fit" is not demanding. Rather it's respecting the interplay between your skills and their needs.
- Also, you can show some enthusiasm by demonstrating that you've researched their office and hold it in high esteem.

Paragraph Two-Why the Employer Should Interview You

- This paragraph should spotlight *experiences* that should set you apart from other applicants. Some of this may come down to phrasing. Address the job's description and explain why you have experience that fills that need. Cover Letters are not for talking about yourself. This is inappropriate—you want to always be making the connection between yourself *and the job*. And only share things about yourself *relevant* to the job. Your personality will come through in time.
- Simply state their need and how you fill it. You can tweak without lying (**Don't Lie!**). Just look at where you match, and omit the areas in which you don't match. This is not lying. No need to bring up negatives, or justify differences (if the differences between you and the job description are major, this job might not be a good match)

Paragraph Three- Now What?

Politely state your availability to meet or discuss further. Indicate that you're easily reached at the number listed. Thank them for their time. Signing "Respectfully Yours," "In Consideration", or "With Appreciation" can set you apart from "Sincerely."

Step Four-Following Up.

- Give them about days. Keep in touch cautiously (no more than every ten days), but don't give up. Being respectful may foster a connection with human resources so that they can hopefully mention *other jobs* that may be coming up.
- When sending emails, be professional. Include the date, perhaps your address, as in a letter. Format your paragraphs. Email is sometimes a convenience for the recipient, but your approach should set you apart. No jargon, typos, etc. If you receive a reply with interest, be responsive! This will also set you apart. They want someone who is *available*.
- As with networking, you're trying to make several "touches" with that connection. With networking you are training others to look for jobs for you. The same holds true with job applications. You want to remind them you're out there. That's why you send Thank You notes. That's why if you don't get the job, you still keep in touch.

Other Resume Tips

- These should be short, concise, and bullet pointed for skimming (assume 100 people are applying for this job), but detailed and precise enough for if they do choose to interview you.
- Always include: education, previous experience, non-legal experience, previous honors, & organizations in which you are a member.
- Explaining why you left a job is not often done, but a good idea since this is the question on every HR person's mind. Ex: *sought to transition into real estate law with my next firm, or pursued a higher paying position at....*
- If you have gaps in your resume this is problematic. Better to explain the gap as an experience than just pretending to drop off the map for a while. For instance: took two years off from law for maternity leave, pursued writing a book for 1 year, etc.
- Interests/Hobbies *are* appropriate. They set you apart and give you things to talk about during the interview. It should be a brief last line. Don't be over the top. Just show that you are interesting.
- Try to write in full sentences as it sounds more professional. Use an active tense. Be grammatically consistent. Especially in terms of where you put dates or format paragraphs or use periods.

Some of this handout was taken from an unpublished book on Job Seeking by Jeff Minzel.



WSBA

Lawyer Services Department The Psychology of Interviewing

Much of this has been adapted from Paul Anderson's 7/8/09 presentation at WSBA

Creating Rapport

Listen to People: This is especially relevant for Informational Interviews. People want to feel understood. They want to feel like they have something special to offer. Interrupting them with your own opinions, or personal contributions, is a way of competing for airspace. Get out of your own way when creating rapport!

Match Their Behavioral Presentation: There's nothing more uncomfortable than a disconnect between someone standing tall, while the other is relaxed. One person speaking loudly and the other softly. One all dressed up, the other casual. It's awkward. This is an important skill. You want people to feel comfortable. Otherwise they won't want to work with you. Remember—this is not about you! It's about you filling *their need*. So whatever personality signatures you are especially proud of can wait a second. This is your chance to *read* the situation.

Connection is approximately:

- 6% words—what you have to say. This is usually overemphasized.
- 38% tone of speech, tempo, volume and style of expression. You want to match this.
- 55% behavioral—this includes how you dress. How you carry yourself. Are you more serious or smiley? If they look relaxed, then be relaxed too. Are you giving them an *equal* amount of eye contact?

Networking

Meeting other lawyers is critical for your career. For solos about 65% of referrals come from lawyers who are either swamped or don't have your practice area.

For those in firms networking not only can get you a job, but it can elevate your career once you are hired. Social skills go a huge way in terms of bringing competent people into the practice, and in terms of getting those important clients.

But a lot of networking involves two people talking about themselves and wondering if they'll have something in common. In some respects one's objectives can seem muddled: Do I want a job or a friend? Be clear about your objectives. Also be aware that

your perspective on your experience will inevitably be influenced by the company you keep. Most of us have a charitable instinct, but if someone is not helpful in terms of satisfying your objectives, know it.

Networking should be a means to an end. The trick to networking, is you have to create a *value proposition*.

That is you have to find a way to be helpful to that person. This goes for jobs, as much as contacts. How are you going to satisfy their need? Can you do work that's helpful for them. Do you have interests that they connect with? Do you know someone they should meet? This focus upon their need should be the first priority from that very first email exchange. It means your eye is on the ball, and you are not over-absorbed by the formalities around keeping in touch.

This is why passing out resumes at a job fair is pretty pointless. There's no value proposition. You talk about yourself and they say "who cares" and drop your resume in the garbage (since a resume is just words, which only count for 6% of connection).

Elevator Pitches

These are mostly so that you know what you want. This value should not be minimized. Being able to articulate what you are really looking for, why it's exciting to you, and how you might be able to connect with someone else on this topic can really offer you focus. It's not about grabbing some executive by the collar and ranting about your skills. Rather, this might be the moment in the informational interview when you are asked about yourself. It should be individualized for different situations. Each point introduced should be able to serve as a jumping off point to expand the conversation.

When Interviewing for a Job

The person that asks the questions has control of the interview. Practice these questions before you go in.

You want to let them express themselves, then gradually take control. Nick Corcodilos calls this *doing the job in the interview*. If they have a series of prepared questions this can be harder, but not impossible.

When answering their questions, remember the 20 second/2 minute rule. Responses that are less than 20 seconds have been found to arouse suspicion. Responses over 2 minutes and you're likely to overwhelm/digress. The trick here is to have enough to say *and* be able to stop on a dime with your statements.

A great method of taking control is to ask questions that simultaneously demonstrate your expertise. These are called *expertise questions*. I'm not a lawyer, but in psychology I might say:

- Do you prefer to use behavioral activation or cognitive diffusion in working with clients who have panic disorders?

- What are the primary domains of treatment planning that you emphasize when facilitating brief interventions?

Stuff like that. It should not be highfalutin. It should be meaningful. There's obviously a lot technical language in law. Don't bore them, just show you're intelligent and get these concepts in a direct and articulate way. Connect these expert questions to your purpose (of being helpful to them).

Power questions are more to the point of how you're going to solve their problems.

- What have been the major obstacles you've faced in completing xyz transactions?
- What are some important changes your practice has been seeing so far this year, and what are some of the adaptations that have been necessary?

You're trying to show that you are in sync with their needs. Ultimately, by the end of the interview you're going to try to create a brief, elegant summary whereby you can articulate their needs and carve out a role for yourself. See how most of this is not explicitly based on your previous experience, etc.

Address Their Objections

These are the most common objections to the message you are likely sending:

- I don't believe you.
Demonstrate your credibility. Justify your points in terms of your previous experiences. Objective criteria over subjective criteria.
- I don't have the money.
Demonstrate to them the cost of *not* addressing their need. Show them how your skills will be profitable for them.
- I don't have the time.
Likewise, find how you can do the work that will allow them to work on other things.
- It may work for others but it doesn't work for me.
Demonstrate the flexibility of your approach.

Handling Behavioral Interviews (not for Informational Interviewing)

from Jason Manino's *Career Lessons from My Recruiting Desk Part 2*.

This is a growing trend in interviewing whereby a smart interviewer can skip past subjective responses where you justify your abilities with adjectives about your worth, and figure out how an interviewee thinks on their feet to come up with solutions.

Common questions would be “What were you thinking at that point?” or “What made you decide on that specific action as opposed to another choice?” or “Tell me about a time when you overcame a crisis, solved a problem, dealt with failure, had to manage someone's performance, etc...” This is not difficult. With a little practice you can come up with prepared answers for these questions. Use the STAR approach:

S/T=Describe the Situation or Task

A=Describe the Action you took in the context of the situation or task.

R=What was the Result of your action?



WSBA

Law Office Management Assistance Program

LOMAP services can be delivered either at your office or via telephone consultation and include:

- **Reviews:** general "preventive maintenance" reviews of office systems and procedures with appropriate suggestions for improvements, usually given free of charge over the telephone
- **Consultations:** on specific problems, systems or procedures; provided on a sliding scale fee based on the number of years the practice has existed
- **Education:** presentations on office management topics. Please contact us at (206) 727-8237 if you are interested in having LOMAP speak to your local Bar or other Bar-related group.

Confidentiality

Under **APR 19(d)**, all services are provided on a confidential basis so that a lawyer can feel comfortable discussing all areas of office management. Concerns outside of the office management area can be referred to other Lawyers Services Department programs such as Ethics Assistance or Alternative Dispute Resolution.



WSBA

Law Office Management Assistance Program Frequently Asked Questions

Starting a Practice

1. How do I start a practice?

Contact the WSBA Law Office Management Assistance Program (LOMAP) by calling 206-733-5914 and ask for the New Practice Packet. You will need a Washington business license and a municipal business license at the minimum. Think about the name of your practice and reserve a web URL.

2. What else?

Set goals for fee revenue and office costs. Prepare a business plan and a list of questions to ask LOMAP staff.

3. What else?

Schedule an appointment with LOMAP staff to discuss your particular situation. The first half hour is free of charge and \$35 per hour thereafter but the meeting usually requires only an hour or so in total.

4. Aren't there any checklists for getting started?

Yes! Go to <http://www.wsba.org/lawyers/services/startupchecklist41007.pdf> and download it!

5. How much should I expect to spend to get started?

About \$10,000 and use credit whenever possible. Keep your own savings as a reserve of last resort.

6. Why do I need that much money?

For equipment, software and operating costs. Acquire the best computer, scanner, printer, backup battery, and fax machine that you can afford. Stay away from multifunction devices and inkjets. Operating costs include rent, utilities, telephone, paper, and other items that must be acquired before you have any cash in the door from clients. MAC or Windows is fine but be committed to learning the software.

7. I am not a geek. Any suggestions?

Yes, attend our computer software classes each month at the WSBA. They are free of charge and discuss practice management software, Excel, Outlook, PowerPoint, Word, and Adobe Acrobat 8. Just register at juliesa@wsba.org

8. Anything else?

Yes, you! Think about how you handle stress. Think about how you like to work. Choose a practice area carefully. That decision drives these variables: meetings, travel, type of client, size of file, interruptions, research and writing, getting paid timely among others. The better your organizational skills, the better chance for success that you have. Test: How often do you balance your checking account?

9. I just remembered...what about my need to set up a trust account?

You need a trust account only if you handle funds that are not yours such as advanced fee deposits. See this link for complete details
<http://www.wsba.org/media/publications/pamphlets/managing.htm>

Building a Practice

1. How do I find clients?

Often it may be your family and friends who become your first clients. Why? Because they know you. And being known is the key to your success throughout your career.

As you practice you will have three reputations that define who you are to others. Your professional reputation establishes you among colleagues. Your practice area, integrity, honesty, level of service, knowledge of the law and how easy you are to deal with all come into play. Your social reputation establishes you among colleagues, friends, family and staff. Your social reputation includes how others perceive your table manners, use of alcohol (if applicable) and general social bearing as you engage in professional activities, hobbies, sports activities and cultural interests. Are you available at all or always “busy?” Your street reputation establishes how you are perceived by staff. Your street reputation describes your office and how you handle the management of your practice. Examples are your level of professionalism and respect when communicating with your staff, non-monetary fringe benefits such as staff scheduling flexibility, and, of course, your management of anger and how you communicate reprimands. All of these networks can attract or repel new business.

Solo lawyers usually can handle 25 to 40 open matters in a competent fashion at one time. If you want more business, do the following:

- Determine how clients find you now and use these sources
- Encourage referrals from clients and other professionals
- Have a website
- Carry business cards at all times
- Contact former clients to see if any need your help
- Attend CLEs and meet other lawyers

The LOMAP Lending Library offers books on loan about finding and keeping clients. The list of marketing and other titles is at <http://www.wsba.org/lawyers/services/index.htm#MK>

2. How much can I expect make?

Focus on gross fees which are payments to you for your services. Gross fees do not include costs and expenses incurred by the matters. Minimum gross fees should be \$150,000 per year as soon as the number of clients reaches a suitable level. Of that amount you will realize about \$100,000 that pays compensation, fringe benefits, and retirement contributions. If not, it is usually because of giving too much free service, clients unable to pay, poor billing practices, poor follow up on outstanding accounts due, and reluctance to ask for sufficient money at the outset of the matter as an advanced fee deposit.

CHECKLIST FOR STARTING A LAW PRACTICE

This checklist is designed simply as a guideline to provoke thought when considering starting a law practice.

It is not meant to be all inclusive.

I. PLANNING/BUDGETING

- Do self-assessment about starting a practice
- Tolerance for Risk
- Managerial Skills
- Marketing Skills
- Confidence Level in Legal Skills
- Write a Business and Marketing Plan
- Projection of gross receipts
- Projection of overhead and expenses
- Projection of net receipts
- Cash flow projections
 - Projection of hours worked
- Marketable experience
- Setting fees to make a profit
 - Written fee agreements

II. MARKETING PLAN/PRACTICE DEVELOPMENT

- Potential Client Base
- Advertising
 - Yellow Page ad
 - Website
 - TV, radio, billboard
- Office signage
- Sign up for county Lawyer Referral Services
- Sign up for lawyer search services
- Firm brochure
- Client newsletter
- Join civic organizations
- Produce community seminars
- Announcements
- Speak at CLE programs

III. FORMS OF PRACTICE

- Considerations in Selecting Form of Practice
 - taxation
 - liability
- succession/dissolution
- Solo Practice
- Partnership
- Professional Corporation
 - Articles of Incorporation
 - shareholders, officers, chief operating officer
 - Statement of Good Standing from Clerk of Supreme Court
- Limited Liability Company
 - Articles of Organization
 - members
- Limited Liability Partnership
- Consult with CPA
 - Specialized/General Practice
 - Partnership Agreement in writing
 - Capital/equity from partners
 - Withdrawal/retirement issues
 - Compensation and profit distribution
 - Each partner's role in the practice
 - Managing Partner
 - Rainmaker
 - Others

IV. OFFICE SPACE/LOCATION CONSIDERATIONS

- Office Building
 - Image, upscale, informal
 - Square footage
 - ADA considerations
 - Parking
 - Services, janitorial
 - Expansion Opportunities
 - Renovation Needs
 - Location
 - Office sharing
 - Renting, leasing
 - Purchasing/buy into a law practice
 - Working from home

V. ACCOUNTING NEEDS

- Consult with CPA
- set up accounting procedures
 - Chart of accounts
 - Profit and loss statements
 - Balance sheets
 - Cash Flow Statement
- quarterly and annual tax returns
- payroll services
- bank and trust accounting systems/reconciliation procedures
- software compatible with accountant

VI. START UP COSTS/CREDIT SOURCES

- Highly suggested that enough cash or a line of credit be available to cover start-up costs and at least the first 6 months to one year of operating expenses plus personal living expenses.
 - Sources of credit
 - Local bank/Credit Union
 - personal, business loan
 - home equity, home refinance
 - line-of-credit to be drawn upon as needed
 - lease, equipment loans
 - family loans/private investor loans
 - Personal savings

VII. BANK ACCOUNTS

- Trust account (separate account)
 - IOLTA account, if applicable
- Business operating account for expenses/payroll
- Short term savings
- Safety deposit box
- Firm credit card
- Investments
- Checks, deposit slips, endorsement stamp
- Set up account to accept credit cards
- Retirement plan

VIII. TECHNOLOGY

- Software
 - Word processing
 - Time and billing/accounting
 - Calendaring and docketing
 - Conflicts checking
 - Case Management
 - Document assembly
 - Office Suite Software
 - Word processing
 - E-mail
 - Spreadsheet
 - Presentation Software (such as PowerPoint)
 - Others
 - Virus protection for computers
 - Voice Recognition
 - Other specialized or practice specific software
- Hardware
 - Computers
 - Operating system
 - Back-up system
 - Lease or purchase
 - Printers
- Network/Firewall
- Scanners
- CD-ROM
- Laptop Computer
- Personal Digital Assistant (PDA)

IX. OFFICE EQUIPMENT/SERVICES/SUPPLIES

- Fax Machine
- Photocopier
- Scanner
- Shredder
- Dictation equipment/Voice Recognition Software
- Internet Service Provider
- Email address
- High speed Internet access or DSL line
- Telephone System
 - Equipment/answering machine
 - Voice mail/manual message system
 - Answering service
 - Local and long distance carrier
 - Conference calling
 - Music on hold

- Cell phone/service
- Pager
- Postage scale/mail equipment
 - Establish UPS and FedEx accounts
- Office furniture for lawyer(s), staff, reception area, file cabinets, conference, room furniture, carpeting and area rugs, book shelves, art work/office decorating needs
- Office supplies, paper, envelopes, pens, staplers, good quality file folders, etc.
 - Business cards, announcements
 - Order public information brochures from the Bar for clients

X. LIBRARY/LEGAL RESEARCH

- Online legal research provider
- Purchase new or used law books
- Local law library
- Law school library
- Courts library
- Internet research
- CD-ROM
- CLE Deskbooks

XI. OFFICE SYSTEMS/PROCEDURES

- Develop office manual/operating procedures manual
 - Standard procedures/policies for practice
 - Personnel issues/benefits
- Docketing, calendaring, tickler system
 - Computer (dual-system is highly recommended)
 - Manual
- File organization
 - Alpha/numeric
 - Centralized/decentralized
 - Opening file procedures
 - Closing file procedures/retention/storage/destruction
 - Document maintenance
 - Offsite - safety deposit box
 - Computer backup
 - Fireproof files
 - Forms used in practice
 - Client interview form
 - Engagement/non-engagement letters
 - Written fee agreements
 - Practice specific checklists
 - Billing Statement Form
 - General client correspondence, notices, etc.
 - Client survey form after conclusion of representation
- Client billing procedures

- Regular monthly statements even if no amount due
- Detailed billing statement
- Expense billing
- Costs to be billed
 - legal assistant time/paralegal time
 - telephone expenses
 - duplicating expenses
 - computerized legal research
 - mailing costs
- others
- Collection policy
- Credit cards for payment

- Client Relations Policy
- Setting appointments, introducing staff
- Returning phone calls, e-mail messages
- Client intake form/survey at conclusion of representation
- Keeping clients informed
 - Send copies of work, documents
- Communicating Fees
 - Clear discussion about fees
 - Written fee agreements/engagement letters

- Accounting Procedures
 - Bank account reconciliation
 - Cash Flow Statement
 - Accounts Receivables/Payables
 - aging review
 - Expense Approval System
 - Counter signature requirement on checks
 - Others

XII. INSURANCE PROTECTION

- Professional liability
- Workers' Compensation
- Health Plan
- Car Insurance for business use
- Property (liability, wind, fire, earthquake, etc.)
- Loss of valuable documents

- Life
- Disability
- Business Interruption

XIII. PERSONNEL

- Legal Assistant/Paralegal
 - Full-time



WSBA

Professional Responsibility Program

This program provides confidential information and assistance in the following areas:

- **Ethics assistance** – (206) 727-8284 or 1-800-945-WSBA x 8284 – a WSBA lawyer will assist Washington lawyers in resolving ethical dilemmas related to their own conduct.
- **Informal Opinions** – issued by RPC Committee responding to written ethical inquiries from lawyers.
- **Formal Opinions** – Ethical opinions approved by the Board of Governors.
- **Rules of Professional Conduct (RPCs)** – rules for ethical conduct promulgated by the Washington State Supreme Court. Additional services provided by the PRP include overseeing the Bar's Wills Search function and Custodianships.

Confidentiality

Under **APR 19 (e)**, communications between an inquirer and professional responsibility counsel are confidential and shall be privileged against disclosure except by consent of the inquirer or as authorized by the Supreme Court.