



South Carolina Bar

Continuing Legal Education Division

The Lean Law Firm: Run Your Firm Like the World's Most Efficient and Profitable Businesses

19-09

Thursday, January 31, 2019

presented by
The South Carolina Bar
Continuing Legal Education Division

<http://www.scbar.org/CLE>

SC Supreme Court Commission on CLE Course No. 190390

The Lean Law Firm: Run Your Firm Like the World's Most Efficient and Profitable Businesses

Thursday, January 31, 2019

This program qualifies for 3.0 MCLE Credit Hours
SC Supreme Commission on CLE Course #: 190390

- 8:30 a.m. Registration**
- 8:55 a.m. Welcome and Opening Remarks**
- 9:00 a.m. Overview of Lean: Systems Thinking & The Income Formula**
This will include lecture and an interactive exercise where participants work in groups on exercises.
- 10 a.m. Break**
- 10:10 a.m. Lean Technology & Marketing**
We will go over what technology you can use to support a Lean law firm and how to use Lean techniques in marketing. This will be a mix of lecture and interactive activities.
- 11:10 a.m. Break**
- 11:20 a.m. Lean Planning, Meetings, and Successful Adoption**
In this segment, we'll cover how to use our techniques to plan your year and operate your firm using our prescribed meeting rhythms. We'll also discuss how to adopt new ideas such as these into your law firm. This will be a mix of lecture and interactive activities.
- 12:20 p.m. Adjourn**

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SPEAKER BIOGRAPHIES

Larry Port

*Rocket Matter
Boca Raton, FL*

Larry Port has worked with thousands of law firms worldwide since 2008 when he started the first cloud-based legal practice management software company, Rocket Matter. His experience running a technology company and insight into law firm operations led to his co-authoring of the #1 bestselling ABA book *The Lean Law Firm*.

In Larry's role as founder and CEO of Rocket Matter, he has become a speaker and award-winning writer at the crossroads of the legal profession, cutting edge technology, and law firm marketing. Larry speaks to an international audience on technology, productivity, cybersecurity, and the business of law. He was recognized by Fastcase as one of the 50 top innovators in the field of law. He is also the author of *The Law Firm of Tomorrow* and *Legal Productivity*.

Larry also writes extensively for legal publications, including the ABA's *Legal Management*, *Law Technology News*, *Law Practice Today*, ILTA's *Peer to Peer*, *FindLaw*, *Chicago Lawyer*, and *Legal Productivity*. He frequently discusses design and efficiency and quality techniques that lawyers can leverage.

Prior to founding Rocket Matter, Larry built software applications for finance industry, the Defense Advanced Research Projects Agency (DARPA), and the human resources industry. Larry is a graduate of Northwestern University, where he received his Bachelor of Science in Radio, Television & Film and New York University, where he completed his Masters of Computer Science from the Courant Institute of Mathematical Sciences.

Larry is married with two kids, two dogs, and one cat. He loves to ski and hike as much as possible—not an easy feat when you live in Florida.

Dave Maxfield

*Dave Maxfield, Attorney, LLC
Columbia, SC*

Dave Maxfield, is co-author with Larry Port of the ABA's # 1 Bestselling *The Lean Law Firm*. Dave runs a boutique consumer protection practice in Columbia, South Carolina. He's the three-time Chairman of the Consumer Law section of the South Carolina Bar and the Past President of the Richland County Bar Association, South Carolina's largest with over 1900 members. In his 24 years of practice, Dave has represented thousands of individual consumers in cases against banks, credit reporting agencies, and insurance companies.

Dave has taught over 100 Continuing Legal Education (CLE) programs to other lawyers, and speaks regularly in the media and to law students on issues affecting consumers both locally and nationally, and frequently trains other lawyers on the use of technology, and was a speaker at the ABATechshow in 2011, 2012, 2013 and 2018. He has also worked with law students at the University of Colorado, UCLA, William & Mary, and Harvard Law School on technology use. Articles by and about him have appeared in *South Carolina Lawyer Magazine*, *ABA Magazine*, and *Lawyer's Weekly*.

Module 1: Systems Thinking / Income Formula

- **Presentation:** What means to see your firm as a linear system
- **Exercise:** Mapping your firm's linear process as a Kanban
- **Discussion** between participants, then group discussion
- **Presentation:** The Income Formula
- **Exercise:** Valuation and Placement of 5 "Case Units" in your linear system
- **Discussion:** How long to "Done?" What's blocking them and what to do (make notes on worksheet)

Module 2: Lean Technology & Marketing

- **Tech Demo:** System visualization with Trello
- **Presentation:** What Lean Marketing means (measuring, finding niches, targeting efforts, measuring results / analytics)
- **Exercise:** Your 5 last "good" completed cases
- **Presentation:** Doing the math
- **Discussion:** How profitable were your "good" cases really?

Module 3: Lean Planning, Meetings, and Successful Adoption

- **Presentation:** Meetings, communication
- **Exercise:** Annual Goal Setting Worksheet
- **Discussion:** Getting buy in from your team

Next Steps

- **Presentation:** Retrospective
- **Exercise:** The retrospective: Start, Stop, Continue
- **Discussion**

Name:

Date:

KPI Worksheet

Select which KPIs you initially want to track, with what frequency (Daily, Weekly, Monthly), and who in your firm is responsible for tracking this information.

KPI	Frequency	Who will do this and how will they get the information?

Name:

Date:

Kanban Board

Name:

Date:

Annual Goal Setting

Result = _____

Outcome: ACUV 	X	Outcome: Throughput Rate(R) 	=	
		WIP 	÷	Outcome: Avg. Cycle Time (CT)
ACUV Task Goals 		Wish List 		CT Task Goals

Name:

Date:

Top 5 Cases

Think about the cases that have brought you the most revenue and identify the top 5. Identify the type of case, the dollar amount, and the time it took to complete them.

Case	Practice Area	Dollar Amount	Time to Complete (in weeks)

What commonalities do these cases share? Consider where they came from, what type of case they are.

How could you find more of these cases? And what could you do to streamline them and make them more profitable?

Name:

Date:

Retrospective

Once a month or quarter, spend 30 minutes with your team going over processes. Identify what you should start doing, what you should stop doing, and any new initiatives you should continue doing that work well.

What should we start?

What should we stop?

What should we continue?

Name:

Date: