

Chicago-Kent College of Law
Opening and Managing a Law Office
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Seminar Description

If you are considering hanging up your own shingle in the next few years, this course will provide you with a systematic overview of the preparation necessary to get your practice off to a good start. *Opening and Managing a Law Office* provides a road map including checklists and worksheets to guide you through the initial planning, implementation, and on-going management of your practice. The student will be provided with practical, organized guidelines for management and operational issues that impact the success or failure of a new office. Rules of Professional Conduct, ethics opinions and ARDC decisions governing practice management issues will be discussed. Develop a Master Blueprint. Learn what you will need in your office in order to service clients. Get a primer in law office technology including live demonstrations.

Books and Materials

Required:

To be determined.

Add'l materials will be posted on the class website two weeks in advance of the topic.

Assigned readings. *Students must read assigned material and demonstrate an ability to use the content of such material in discussions and in their written analyses.*

Supplemental Non Required Books:

How To Start & Build A Law Practice - Jay Foonberg - ABA Publishing
Flying Solo - A Survival Guide for the Solo and Small Firm Lawyer - K. William Gibson - ABA Publishing
2009 Solo and Small Firm Legal Technology Guide Sharon D. Nelson, John Simek, ABA Publishing
The Lawyer's Guide to Practice Management Systems Software, Second Edition, Andrew Z. Adkins, ABA Publishing
Lawyer's Guide to Records Management and Retention - Cunningham & Montaña, ABA Publishing

Materials:

I have posted, on the course web site, a number of relevant articles, audio and video files and links to relevant sites, that I discovered during my research for the preparation of this course. Should you have any materials you wish to share with the participants please forward to me, in PDF format, by e-mail.

Class Rules and Procedures:

Purpose:

These rules are designed to put us in the same type of environment that one would be in if attending court or in a meeting with a client.

Modification:

These rules and procedures may be modified from time to time through modifications published on the Web, or communicated orally to the affected student. Modifications take effect as they are published or communicated.

Class Web Site:

The class web site can be found on IIT's Blackboard system. Students are responsible for checking the site weekly for assignments, announcements and new postings.

Attendance:

Attendance to all sessions is required. Students with three (3) or more unexcused absences will be dropped one grade level.

No phones or other message receiving devices:

All phones, Blackberrys, Treos and other message receiving devices shall be completely turned off before entering the class room. Any student caught using such a device during class will be instructed to leave the class and charged with an unauthorized absence.

Use of computers in class:

Computers may be used solely for recording or reading class notes during a class session. Any student caught using a computer for any other purpose (such as sending or reading email, working on another course, surfing, games etc) during class will be instructed to leave the class and charged with an unauthorized absence.

Class Participation:

Since this course is a seminar, every student must participate actively and seriously in class discussions. A response of “Not prepared” will not be accepted.

Grading:

Student’s grades will be based upon their written paper(s), quiz score and class participation. As noted above poor attendance could affect the final grade. Each student’s paper will be judged on its own merit and will not be evaluated against other students papers. No curving of grades will be utilized.

No “Incomplete”:

Students who do not complete all the requirements by the end of the first semester for which they register should not expect to receive a grade of "Incomplete." Instead they should expect to receive an "E," signifying failure, or a "WP" or "WE," in the sole discretion of Judge Moss. In order to receive credit for a seminar not completed by the end of the first semester for which a student registers, the student must re-register for another semester and pay tuition again. For international students, this may not be possible and may result in failure to earn their degree.

Grade Criteria:

Students' grades on their paper will depend on the quality of the paper; the absence of typos, grammatical and style errors. Your paper should reflect originality with careful, relevant research, depth and clear analysis.

Ethics:

Plagiarism will receive zero tolerance and could result in your failing the course and possible expulsion from the law school. Every student shall familiarize themselves with the “Ethics Guidelines for Chicago-Kent Writing Classes” A copy is on the course web site.

Copyright and Web Publication.

By enrolling in a seminar taught by Judge Moss, a student grants a license to Judge Moss and to Chicago-Kent College of Law at Illinois Institute of Technology, jointly and severally, to publish the completed paper on the Web or through other technologies, crediting the student as the author of the work, and to quote from the work, without limitation on length, so long as the quoted language is credited to the student author.

Course Schedule

With the exception of paper related deadlines to be announced, this schedule will be somewhat flexible and will be dependent upon discussion flow and guest lecturer availability.

- Aug 27 Purpose of the Seminar
Summary of topics to be discussed and their inter-relationship
Explanation of required papers
- STEP 1. WRITING A BUSINESS PLAN**
What are the necessary elements of a business plan? How far out do you plan?
Identifying costs and revenue sources. Creating an initial budget.
- Sept 3 **WHERE'S MY OFFICE?**
From operating a home office, or renting at an Executive Suite, to leasing a full time office, our guest lecturer will provide risks and benefits of each. Learn what to look for when negotiating a lease.
- Sept 10 **CAPITALIZATION**
What are the financial risks of a new practice?. How much money do you need?
What does it take to obtain a loan in today's economy?
- Sept 17 **PERSONNEL CONSIDERATIONS**
Determining your staffing needs and affordability. How do you decide when to hire? Should you use "virtual" staff? Contract attorneys? Ethical concerns.
Determining who manages the office. Determining compensation for employees and partners.
- Sept 24 **INSURANCE - What You Need and How To Avoid Claims?**
In addition to malpractice coverage, what other types of insurance do you need to protect yourself and your family? What is cyber-insurance?
How do you develop necessary risk management policies?
- Oct 1 **MARKETING & NETWORKING**
Two leading experts guide you through key steps in developing your practice. Topics include - Drafting a marketing plan, New Practice announcements, Soliciting business, Should you use print ads? Networking, Establishing a web site, Newsletters / Podcasts / Blogs?
Social Media
- Oct 8 **SOLO OR WITH OTHERS**
Do you have the personality to go Solo? Other choices - Creating an online law firm with other attorneys. Considerations before forming a partnership. Office sharing pluses and risks. What type of business entity should you use? Law Firm Partnership and Shareholder Agreements

- Oct 15 **DOCUMENT MANAGEMENT AND RETENTION POLICIES**
 What's the difference between the two? Start from the beginning - Go Paperless. Using a Document Management application. What's included in the policies. Preparing for disaster
- Oct 22 **ACCOUNTING AND BILLING**
 Do you need an EIN? How to get one. Selecting a CPA. Selecting the right time and billing program and accounting system for your practice. Establishing an effective billing and collection process. Handling I.R.S. requirements. Creating and managing an IOLTA account.
- Oct 29 **DEVELOPING A CLIENT MANAGEMENT SYSTEM**
 Why use a Client Management Program? How to choose and set-up the one right for your practice area. What must be covered in an fee agreement? Conflict checking. Avoiding malpractice with the right calendar / docket program.
- Nov 5 **TECHNOLOGY CONSIDERATIONS**
 Our practice management expert will provide the tips and tricks in dealing with the practical concerns to be faced when choosing and installing technology in your new office. Security, Backups, Mac or PC, and lots more.
- Nov 12 **WHAT DO YOU NEED TO START? Obtaining Efficiency with a Limited Budget**
 What software applications do you need? Choosing the right hardware. Implementing the right phone system. Deciding on office equipment & furnishings.
- Nov 19 **THE INITIAL CLIENT INTERVIEW**
 The first contact with a client is often the most important. We will discuss how to prepare, pre-interview instructions to the potential client, how to begin and how to end. We will also examine how to evaluate whether you want the case and/or the client. Things to watch for, psychological tips and how to listen.
- DEALING WITH THE HIGH MAINTENANCE CLIENT**
 Every lawyer has one. - the client that insists on monopolizing your time, controlling the case, needs constant support, etc. etc. Learn how to deal with these clients in an effective way and still be professional
- Dec 3 **USING TECHNOLOGY TO ENHANCE CLIENT COMMUNICATIONS**
 Living up to your responsibility to keep clients informed while complying with other ethical duties. Using collaboration tools, Being responsive on the go - Mobile Technology and its pitfalls. Metadata, Encyption, Security concerns. How to create and use digital signatures. Using blogs, enewsletters, podcasts and websites to communicate educate and lots more.

Guest Lecturers:

In order to provide you with a comprehensive background and understanding, I have invited a few select guest lecturers. A schedule of names and dates will be provided later.

Contact Information:

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