HARTMANN
LAW FIRM

THE LAW FIRM STARTUP CHECKLIST

Robert Hartmann, Esq.
Author of *Making it Rain: The Art of Building a Successful Law Practice*

CLIENT FOCUS

What will be your practice areas?

- Types of cases you enjoy
- Other cases you'll take on as you scale?
- Grow your credentials - become more valuable
  - [ ] Become a certified specialist, teach, blog
  - [ ] Be the lawyer who solves problems - create a diverse contact list to refer out anyone who calls

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- [ ] Identify ideal clients and the most efficient ways they can connect with you

Who are your referral sources going to be?

- [ ] Friends and colleagues
- [ ] Networking/Marketing groups
- [ ] Court referrals - understand how to get them
- [ ] Create a referral relationship with your prior firm and stay in touch with attorneys who leave
- [ ] Make a goal to grow your attorney referral base by a comfortable number every year – and keep them happy

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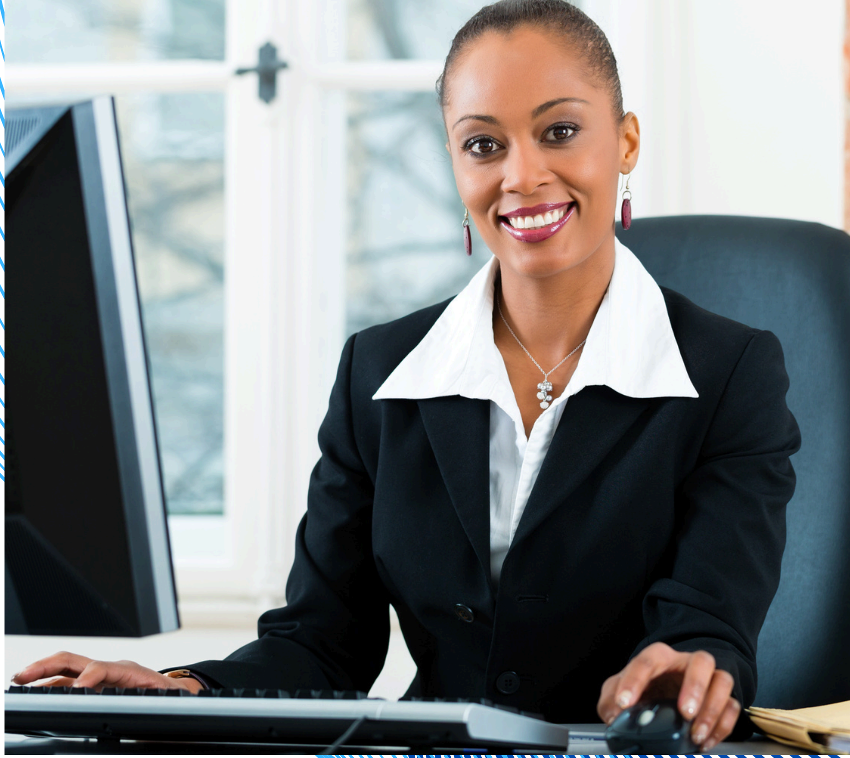
650 Town Center, Suite 1400, Costa Mesa, CA 92626 hartmannlawfirm.net bob@hartmannlawfirm.net

OFFICE FOCUS



Basics

- [ ] Firm name
- [ ] Firm location
- [ ] Update the state bar and post office

Structure

- [ ] Sole Proprietor, PC, APC, LLP, LLC?
- [ ] Need a partnership agreement?
- [ ] Obtain required state, local business licenses
- [ ] Know state bar rules for registering firm and trust account
- [ ] Notify Secretary of State - register firm, obtain EIN

Bank Setup

- [ ] Operating account
- [ ] Trust account - IOLTA - understand reporting requirements

Office setup suggestions

- [ ] Share office expenses and create referral relationship with others
    - Ensure confidentiality and security for client files
- [ ] Telephones: Are you giving out an office number, or your cell phone? Do you need an answering service?
    - What processes must be in place to ensure clients, courts and referral sources receive quick callbacks?
- [ ] Case Management System (CMS) - talk to colleagues about what works for them
    - CMS should incorporate office calendar, auto-record time spent, create billing documents, tasks, client portal, integrate email, texts and accounting

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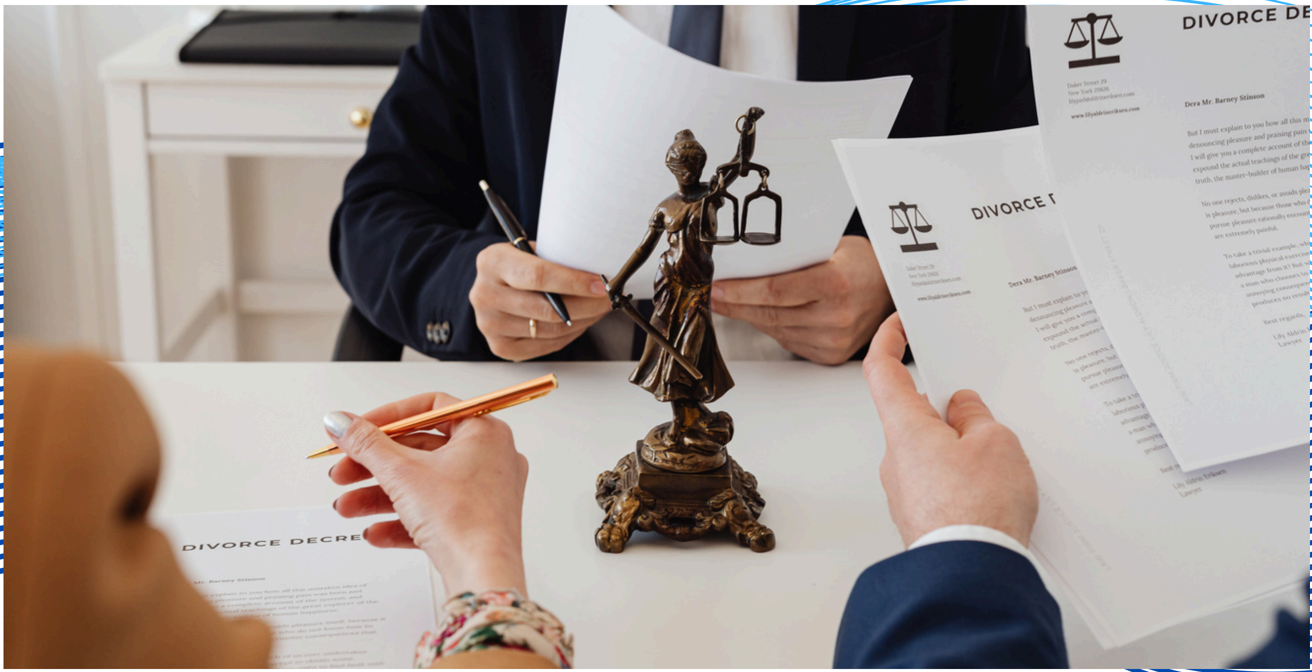
Integrate workflow with client care

- [ ] Create workflow process
- [ ] Client intake
- [ ] Create intake documents
- [ ] Set your hourly fee and retainer requirements
- [ ] Create templates for fee agreements and process for review with clients
- [ ] Closing cases - train staff how to close files, and transfer to on-line or brick and mortar storage - know how long you must retain files

- Client care - how will the office workflow process help you get good results for your clients, as well as relieve their anxiety and stress?
- All processes should be designed to keep and grow your referral sources. Will you pay referral fees? How will you incorporate networking as a vital part of your practice? How will you be sure to stay in touch with those who send business?



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FINANCIAL FOCUS

Prepare for six months with no business and keep expenses low.

Typical start-up expenses:

- [ ] Insurance - cyber, general liability, malpractice, workers' comp
- [ ] Rent
- [ ] Copy, scanning, postage
- [ ] Online research - pay only for what you need
- [ ] Stationery, cards, envelopes
- [ ] Support staff
    - Do you need a receptionist (phones, admin), paralegal or someone to do one or both?
    - Create employee handbook - have an employment lawyer prepare it
    - Train staff to quickly reach you for new clients, court calls
    - Retain great staff
- [ ] Website - define its purpose and consider whether search engine optimization (SEO) is going to return good cases
- [ ] Invest in your appearance
- [ ] Put on a great launch event and create excitement. You're the new legal expert in the community

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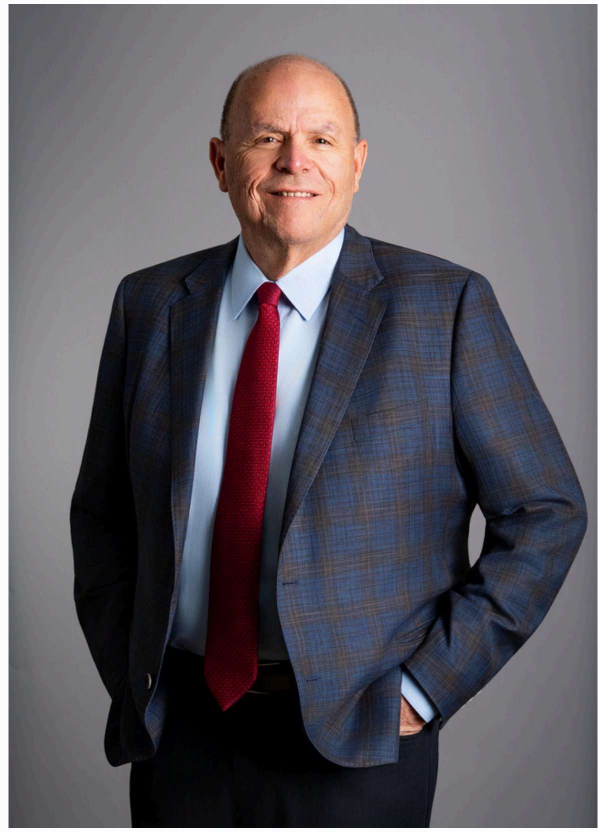

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