

# Small Firm Bootcamp 2020

May 7th & 8th in New Orleans, LA  
The Hampton Inn & Suites - Convention Center





# Introduction

If you want a law practice that's both lucrative and enjoyable then you must create radical efficiencies. Technology is supposed to help make that happen, but for too many lawyers technology has been more frustrating than helpful.

The reason is almost certainly that they're using technology haphazardly. Or as Bill Gates famously observed:

*"The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency."*

The key to success with technology is to use it sensibly and strategically so that you magnify efficiencies in a big way. Doing that means focusing on three key things.

1. **Simplicity** - which is about creating systems, and eliminating unnecessary complexity —so your practice becomes much easier to run. Being paperless and leveraging cloud tools and services are key here.
2. **Automation** - is how you can create massive scalability in your practice, so that more work gets done without your involvement or intervention. There are many things you can automate, but most lawyers should focus on text automation and using automated scheduling tools to start with.
3. **Virtualization** - this where you start gaining the freedom to escape the miserable grind that most lawyers are trapped in. The first step is to learn how to get work done away from a traditional office setting. Tapping the power of outsourcing and virtual assistance is a big part of this stage, which is an admittedly advanced stage.

But it's also about delegation, which is about leveraging the power of people to get more work done. Ideally, everyone you work with will collaborate using cloud services that make virtual work easier and less stressful.

Of course marketing your practice is important too, but those three elements are all part of creating efficient, cost-effective marketing systems as well.

Over the next two days you'll discover amazing ways to simplify, automate, and virtualize your law practice...

So that you can start working less, earning more, and spending a lot more time away from the office—relaxing and doing fun things besides practicing law.





# Small Firm Bootcamp - Detailed Agenda

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## Day 1 - Thursday, May 7th

**7:30 am – Registration Opens / Coffee & Pastries (complimentary)**

**8:30 am** – Welcome; plus tips for getting the most out of Bootcamp: Ernie Svenson

**9:00 am** – Systematizing & Simplifying Your Small Firm Practice - Patrick Slaughter

**9:30 am** – Your Personal Brand: What it is and How To Improve it – Mike Kim

**10:30 am – BREAK**

**11:00 am** – Digital Dictation Magic (using your computer or your smartphone) – David Sparks

**11:30 am** – A Text Automation Tool That Will Save You Hours of Time – Brett Burney

**12:00 Noon - LUNCH BREAK (your meal is provided at no extra charge)**

**1:30 pm** - Automating Your Client Scheduling for Less Than \$30 Per Month – Megan Hargroder

**2:00 pm** – Fundamentals of Law Firm Marketing – Conrad Saam & Mark Homer

**3:00 pm – BREAK**

**3:30 pm** – How to Keep Your Super Sensitive Data Secure in an Increasingly Insecure World – Craig Bayer

**4:00 pm** – How to Delegate Work to People You Hire on a Part-time, or Per-Project Basis (even work that only lawyers can do) — Maddy Martin, Kristin Tyler & Chelsey Lambert

**5:00 pm – END OF DAY - Cocktail Reception (complimentary)**

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## Day 2 - Friday, May 8th

**7:30 am – Coffee & Pastries (complimentary)**

**8:30 am** – Introduction & Brief Q&A: Ernie Svenson

**9:00 am** – How to Get More Great Client Referrals by Sending Just One Email Per Month - Ernie Svenson

**9:30 am** – Electronic Discovery: What You MUST Know Now - Craig Ball & Brett Burney

**10:00 am** – How to Get Important Work Done While On the Road With Nothing More Than a Smartphone (even if you're in a plane at 30,000 feet) – Adriana Linares

**10:30 am – BREAK**

**11:00 am** – How Improving Community Relations Leads to More Referrals - Parker Layrisson & Daryl Gray

**11:30 am** – Podcasting is an Easy & Powerful Way to Grow Your Reputation – Danny Ozment

**12:00 Noon - LUNCH BREAK (your meal is provided at no extra charge)**



**1:30 pm** – Law Firm Accounting Essentials From The Perspective of an Accountant – Amanda Aguillard

**2:00 pm** – Hyper-organizing Digital Documents So You Can Find Anything You need In Less Than 30 seconds – Craig Bayer, Adriana Linares & Chelsey Lambert

**3:00 pm – BREAK**

**3:30 pm** – Using Visuals Effectively to Better Persuade (in court or out)– Craig Ball

**4:30 pm** – Which Technology Tools Matter Most Right Now – Ernie Svenson

**5:00 pm – END OF PROGRAM**

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## Co-Pilot's Lounge (Both Days)

This room will feature small group discussions led by two or three of the speakers on topics relevant to their expertise. This is an opportunity to delve deeper into key areas of your law practice.

**Active members of the Co-Pilot program have first priority** to the seating in this room. The room capacity is limited to 50 people.

### DISCUSSION TOPICS

- **Advanced Practice Management - The Systems, Staffing & KPIs:** (Patrick Slaughter, Andrew Legrand, Parker Layrisson)
- **Best Practices in Personal Branding** (Mike Kim)
- **Best General Marketing Strategies & Tactics** (Megan Hargroder, Conrad Saam & Mark Homer)
- **Advanced Automation Practices** (Brett Burney, David Sparks & Andrew Legrand)
- **Advanced Outsourcing Practices** (Maddy Martin, Kristin Tyler, Chelsey Lambert)
- **Advanced Practice Management - The Technology Part: Consultant Insights** (Chelsey, Craig, Adriana)
- **Creating a Better Law Practice by Escaping “The Churn”** - Mike Whelan



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## Speaker Profiles

The Bootcamp speakers listed below are all top consultants, and lawyers who have specialized expertise in

- Practice Management Software
- Document Storage & Organization
- Digital Security
- Mobile Lawyering & Virtual Collaboration
- Online Marketing & Branding
- Law Firm Finances & Accounting
- Paperless Lawyering & PDF software
- Document Automation options
- Outsourcing & Virtual Assistants, and more.

These folks charge thousands of dollars per day for one-on-one consulting. But you'll get access to their valuable guidance free of charge during the Bootcamp.

**Amanda Aguillard:** is the founder of Aguillard Accounting, a small business accounting firm with clients across the country (but based in New Orleans). She focuses completely on solo and small law firms and real estate brokerages.

**Craig Ball:** is a former Texas trial lawyer who now specializes in computer forensics and electronic evidence issues. He has served as a court-appointed special master and e-discovery consultant in several of the most challenging and celebrated cases in the country. Craig is a noted speaker, author and law professor at Georgetown and the University of Texas.

**Craig Bayer:** helps small law firms with document management related issues. He's been doing tech consulting for over ten years, and has worked with hundreds of law firms during that time. Craig is keenly knowledgeable about data security and how to prevent the most common threats that solo and small firms face today. He speaks to bar associations and lawyer groups, including the ABA TECHSHOW.



**Brett Burney:** is a nationally recognized author and speaker on legal technology—particularly text automation, e-discovery and the use of Mac computers. He’s been a featured speaker at numerous legal conferences around the country, including the ABA TECHSHOW (which he was the Chair of in 2015).

**Daryl Gray:** is a New Orleans-based personal injury attorney who has been extremely successful in doing community outreach to amplify his referral marketing system.

**Megan Hargroder:** specializes in helping solo and small law firms attract better clients more easily, by establish stronger rapport and greater trust through the strategic use of effective story-telling.

**Mark Homer:** uses his twenty-five years of experience in marketing and technology to help lawyers grow their law firm business. He runs runs GNGF (“get noticed, get found”), an agency that provides high-touch service and focuses on helping law firms achieve their business goals through effective branding and marketing. Through his book (Online Law Practice Strategies), his speaking, blog posts, and online videos, Mark strives to help firms of all sizes, whether they are his client or not.

**Mike Kim:** specializes in helping small business owners attract top notch clients and customers through more effective marketing messages. His motto is “marketing isn’t about closing a sale, but about opening a relationship.” He’s worked with nationally recognized speakers and authors such as John Maxwell and Michael Hyatt to name just two.

**Chelsey Lambert:** has been fully immersed in the world of legal for almost twenty years. She has evaluated and written unbiased reviews of hundreds of different kinds of services and software geared towards solo and small firm attorneys. She has also done consulting and training for lawyers around the country. Chelsey also speaks to lawyer groups all over the country, including the ABA TECHSHOW.

**Andrew Legrand:** founded Spera Law Group, where he and his associates focus on helping small business owners. Andrew has created radical efficiencies in his practice by leveraging high-level automation, cloud-tools, and paperless workflows. He speaks to bar associations and lawyer groups, including the ABA TECHSHOW.





**Adriana Linares:** is a law practice consultant and legal technology coach. Through her company (LawTech Partners), she's worked with hundreds of law firms, legal departments, legal aid groups, bar associations, and legal technology startups.

She currently serves as a technology consultant the Florida Bar Board of Governors and the San Diego County Bar Association. And she hosts the New Solo podcast on the Legal Talk Network. She served as Chair of the ABA TECHSHOW in 2017, and has spoken at dozens of legal conferences around the country over the past 15 years.

**Parker Layrisson:** built a substantial personal injury practice in a small Louisiana town (population 6,596) by writing a book that helped him more effectively market his practice. Today, he works on refining his automated marketing systems, and enjoys mentoring young lawyers who have started their own practices.

**Maddy Martin:** is the head of growth and education for Smith.ai, a virtual receptionist & intake service staffed by friendly receptionists and powered by cutting edge technology. She's a frequent speaker on marketing and business development topics.

**Danny Ozment:** helps solopreneurs and small business owners start and run podcasts to help build trust that leads to more referrals. Danny produces Ernie Svenson, Mike Kim, and Parker Layrisson's podcasts, along with dozens of other folks who are interested in doing tasteful, powerful marketing that's also pretty easy.

**Conrad Saam:** is the founder of Mockingbird, an online marketing agency focused exclusively on the legal market. His company does search engine optimization, paid search advertising and website design and development.

**Patrick Slaughter:** started practicing law in 2013, focusing on family law in Knoxville, Tennessee. He also does some immigration work. After attending a Small Firm Bootcamp in 2015 he started leveraging technology to streamline his firms operations through the use of systems, automation, and outsourcing.

Apparently he succeeded: Patrick and his wife Zena recently purchased a second home in Orlando and now spend half their time enjoying the Magic Kingdom instead of being stuck in a law office in Knoxville.



**David Sparks:** is a solo business lawyer in Orange County, California. He's been a frequent speaker at bar association conferences around the country, including the ABA TECHSHOW, where he helps lawyers learn to better harness the power of technology to make their practices run more smoothly, with less effort.

David is a well known speaker, author and podcaster (i.e. Mac Power Users, Automators, and Focussed podcasts). He loves jazz and is an accomplished musician and never visited New Orleans before the May Bootcamp.

**Kristin Tyler:** is a Co-Founder of LAWCLERK, a web-based marketplace where solo attorneys and law firms can discretely and ethically outsource projects to qualified freelance lawyers of all levels of experience and expertise. She speaks to lawyer groups around the country about how to more effectively outsource legal work.

**Mike Whelan:** practiced family law with an eye towards creating massive efficiency in our lumbering legal system. Needless to say, he quickly became frustrated and somewhat disillusioned. He melded his frustration with some deep insights, and wrote a provocative book called Lawyer Forward, which you can learn more about by visiting his website: [lawyerforward.com](http://lawyerforward.com).

His goal, through his speaking and writing is to replace the broken model we were taught in law school and at bar events with something much better.

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## Systems & Productivity

Here's a list of books to help create better systems and radical productivity:

- *The E-Myth Revisited: Why Most Small Businesses Don't Work and What To Do About It*, by Michael Gerber
- *The Effective Executive*, by Peter Drucker
- *The Personal MBA*, by Josh Kaufman
- *The Power of A System*, by John Fisher
- *Traction: Get a Grip On Your Business*, by Gino Wickman
- *The 80/20 Principle: The Secret of Achieving More With Less (20th Anniversary Edition)*, by Richard Koch
- *Getting Things Done*, by David Allen
- *Free to Focus*, by Michael Hyatt
- *Principles*, by Ray Dalio
- *7 Habits of Highly Effective People*, by Steven Covey

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### List the Systems You Plan to Implement

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### List Top Key Performance Indicators (KPI's) You Will Monitor

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## 12 Automation Essentials

Here are some things to focus on if you want to leverage the power of automation in sensible, strategic ways.

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### Basic

1. Preference Settings & Keyboard Shortcuts
  2. Styles in Word Processing Software
  3. Templates: Read *Typography for Lawyers*, by Matthew Butterick
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### Intermediate

4. Online Scheduling Services (e.g. Acuity, Calendly, ScheduleOnce)
  5. TextExpander software
  6. Email Service Providers (e.g. ConvertKit, Mailchimp)
  7. Sanebox service for intelligently filtering and processing email
  8. Email Templates (available in Spark email app, and MixMax service)
  9. Password manager (e.g. LastPass, 1Password, Roboform, Dashlane)
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### Advanced

10. Watched Folder automations (e.g. Hazel for Macs; File Juggler for PC's)
  11. Zapier - connect web services and pass data automatically
  12. Turbocharged Automation (e.g. Keyboard Maestro for Macs)
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### List the best options for you to implement soon

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## 10 Virtual Assistance Options

Remember the key is to stop asking “how” to something, and instead ask who can you get to do things for you. Outsourcing is the best way to get cost-effective, expert help and here are some of the top options for doing that.

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### Subscription-Based

1. Virtual Receptionists (e.g. Smith.ai)
2. Virtual Bookkeeping/Accounting

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### Per-Task or Project

3. Virtual Secretarial assistance (e.g. Speak-Write)
4. Virtual legal assistance (e.g. LawClerk.legal or Hire An Esquire)
5. Virtual paralegal assistance (e.g. Equivity)
6. Virtual Marketing assistance
7. FancyHands - subscription service for simple tasks
8. Fiverr.com - simple, low-cost outsourcing
9. 99Designs - design work done in 7 days or less

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### Advanced

10. Upwork - pay as you use outsourcing for anything imaginable

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### List the best options for you to implement soon

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## Marketing Recommendations

Marketing is hard no matter what kind of business you're in. But it's much harder for lawyers. Why?

Because most people do not want what lawyers sell. Some people may need legal services, but they'd rather not have to hire a lawyer. So if you want to get a steady stream of good clients you need to do marketing really well.

The most effective and easiest kind of marketing is referral marketing. And it's also the most tasteful and dignified. So, start by creating a solid referral marketing system and then supplement it with online marketing, social media, advertising or whatever else makes the most sense for your situation.

Most of all, learn as much as you can about how to properly market your practice. Here are some great books that will help you tremendously:

- *Ogilvy on Advertising*, David Ogilvy (the “Father of Advertising”)
- *No B.S. Direct Response Marketing*, by Dan Kennedy (the best book to read to learn about Ogilvy’s favorite kind of marketing: direct response).
- *This is Marketing*, by Seth Godin (an excellent overview of modern marketing for small businesses).
- *Magnetic Marketing*, by Dan Kennedy (his most recent book is also excellent).
- *Building a StoryBrand*, by Don Miller (will teach you to craft effective marketing messages via the power of stories)
- *Never Eat Alone*, by Kieth Ferrazi (a comprehensive guide to doing effective referral marketing; aka “relationship marketing”)

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### List Your Next Steps for Doing Effective Marketing

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## Ernie's Core Values

1. **Results** - I care about helping people get results, which means I need to do more than just dispense information and advice. That's why I focus on helping you cultivate the best mindset possible, to ensure that you will succeed—even in the face of inevitable obstacles.
2. **Authenticity** - I most value people who are sincere and down-to-earth. I prefer not to deal with arrogant, phony jerks.
3. **Transparency** - I also prefer not to pretend that I don't make mistakes. I'd rather openly discuss my mistakes if doing so will help others feel less stressed about taking on challenges in running their businesses.
4. **Honesty** - A lot of bad advice I received was from people who meant well but who lacked sufficient perspective or insight. I still see those kinds of people still causing unwitting damage to solo and small firm lawyers. I'd rather tell the harsh truth if it can help lawyers avoid problems, even if it might offend the well-meaning folks who offer bad advice.
5. **Context** - We need to see things in context because that's how everything is best understood. Everything is interconnected to some extent, and we need to be mindful of how things connect to make sensible decisions in an overly complicated world.
6. **Simplicity** - I look for the simple, powerful levers that create massive improvements. I work hard to make my advice easy to understand and as easy as possible to implement. Then you'll be more likely to make massive improvements (instead of getting stuck or derailed).
7. **Realistic** - Just because something's a good idea doesn't mean that it's easy to get people to adopt it. Human nature (i.e. practical psychology trumps technology and pretty much everything else).
8. **Open Minded** - It's best to avoid take advice from dogmatic people. I try avoid dogma as much as possible. You need to connect the dots in the way that serves your situation, not mine.
9. **Mentoring** - I will eagerly and enthusiastically introduce you to the folks who mentored me, or whom I believe are better mentors for you than me in certain areas. We can all mentor each other if we act selflessly and sensibly.
10. **Community** - I want to be part of a community of great learners and great mentors. This conference is my best effort at creating that community and helping it grow in a powerful way.



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## Still Haven't Signed Up For Bootcamp?

Please understand that this conference will sell out and the special discount pricing will be going away before that happens. There are special bonuses in addition to the special pricing, which you can learn about at this page:

[lawfirmautopilot.com/live-events/small-firm-bootcamp](http://lawfirmautopilot.com/live-events/small-firm-bootcamp)

We even guarantee your ticket purchase, which means that **if you register but for some reason later can't attend we'll give you all your money back**. Who does that? Answer: someone who's completely confident that the conference will sell out.

# About Ernie

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Ernie Svenson learned the secret to working smarter (vs. *harder*) **right out of law school**. In 2000, he discovered the power of **creating a paperless practice**, which was dismissed as impossible by most lawyers.

Two years later, Ernie was **the 5th lawyer to create a weblog**, which led him to discover the power of online marketing before 99% of attorneys even imagined they might be able to get clients via a website.

For the past decade he's focused on **teaching solo and small firm lawyers** how to harness **systems**, technology, and **psychology** to better manage and market their practices—so they can start working less, earning more, and taking more time off. To learn more, visit these websites: **lawfirmautopilot.com** **paperlesschase.com** and **ernietheattorney.net**







[LawFirmAutopilot.com](http://LawFirmAutopilot.com)