

Checklists, Reading Lists and Connecting The Dots

Connect the dots from planning to success.

By Bill Daniels

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Last year I wrote about how I was starting my own practice and it seems many of you have lived similar experiences. Thank you so much for your kind emails and for sharing your own experiences with me. I'm truly honored and humbled by your good wishes.

One email that caught my attention came from James Whigham, who wrote:

I read your article in the July 2009 edition of the Advocate with keen interest. I am a newly minted attorney (April 2009) looking to start my own firm. Being new... I am attempting to inform myself on all of the legal, ethical, and business requirements involved in starting my own practice.

I have a book published by the State Bar of California, "The California Guide to Opening and Managing a Law Office." The book centers on the business aspects of starting a practice. It does not go into detail about the basic requirements like: California Business License or incorporation.

I am wondering if you can recommend a book or a series of articles that contains a complete check list or a series of articles from which I can create a check list of things I must do to start my own practice?

Well, James, the answer is, I don't really know of any books directly on point I would recommend, though the American Bar Association's *How to Start and Build a Law Practice* (5th Ed.) seems highly regarded. For a reading list, I'd suggest searching Amazon.com and the web (I found a useful list by typing "starting a law practice in California into the *Bing.com* search engine). For some sample checklists, I Googled "law practice start up checklist" and found several that seemed to cover all the basics, including organization, office selection, bank/finance, licensing, etc.

That being said, I believe the most important checklist is the one you create yourself to help connect your passion with your practice.

For many years, the first item on my personal list has been: **Make sure you are doing work you love.** I fixated on this notion while clerking on the Westside during law school. My then boss, Tony Stuart, introduced me to the works of Deepak Chopra (*The Seven Spiritual Laws of Success; The Book of Secrets: Unlocking the Hidden Dimensions of your Life*), the pop guru. Chopra said he told his own children, **"Don't worry about success. Just figure out what you love, do that and success will naturally follow."** From my experience, that advice is exactly right on.

To connect the dots from planning to success, there are some time tested tools you can add to your personal checklist:

1. Write a business plan and keep it current.

Before I opened my own shop, I drafted a business plan, which I cobbled together using a format I found for free on the internet. The written plan lay out my strategy going forward and I keep it as a living document, meaning I update it regularly and use it both to check my progress and stay focused on the path that is taking me where I need to be.

2. Create a marketing strategy.

We're a learned profession and so, as a culture, we tend to look askance at marketing and advertising our services. In my view, that's foolish prejudice.

We live in a modern economy and provide a necessary service. Within the boundaries of decorum and understanding that as officers of the court, one of our noble privileges is to put a public face on the American civil justice system, your checklist needs to have a section devoted to identifying precisely how you intend to let people know what you do so they will hire you to do it.

3. Find an organizational system that works for you and stick with it.

My sense is, the biggest problem lawyers old and new face every day is how to get organized in their practices and their lives.

Organization is something I struggled with early on. For several years, I managed to mask my own disorganization. Then I began working for a brilliant lawyer who was even more disorganized than I. When I adopted his bad habits on top of my own, the result was pain and misery for those around me (especially my poor staff) and not a lot of happiness on my side as well.

I solved my organizational problem by taking a one day seminar from the Franklin-Covey people (the same ones who produce the famous Franklin planner) and then disciplining myself to follow the system they taught. If you've got similar issues, I highly recommend you seek out some training sooner rather than later.

4. Make ongoing education part of your basic plan.

Some folks figure that once they've earned their degree and license, it's okay to coast for the rest of their career. Trust me, it doesn't work, so let's just not go there.

Plan for change and keep your tools sharp by planning ahead. Some useful reading for solo practitioners is *Free Agent Nation: The Future of Working for Yourself*, Daniel H. Pink (2001), which reveals that we're not just a group, we're a demographic trend. *Art of Cross-Examination*, Francis L. Wellman (1903) will give you some time tested tips on how to zero in on a witness, while *The Art of War, Sun Tzu* (5th Cen. B.C.) and *Tao Te Ching*, Lao Tzu (6th Cen. B.C.) will help you strategize your cases and balance your life.

Rules of the Road: A Plaintiff Lawyer's Guide to Proving Liability, Rick Friedman & Patrick Malone (2007) and *David Ball on Damages*, David Ball, Ph.D. (2005) are required reading for all consumer attorneys. *The Mind Map Book*, Tony Buzan (1993) will teach you how to organize all that important knowledge so that it is also useful.

Read *The Making of a Country Lawyer*, Gerry Spence (1996) for inspiration and *A History of the English Speaking People*, Winston S. Churchill (1956) for perspective.

Finally, don't forget your Bible, Torah, Koran or other spiritual text to stay connected with your moral roots.

I wish you success in your personal quest to succeed.

Bill Daniels regularly publishes a variety of articles and videos to keep you abreast of legal developments and case law that affect our society.

Additional information related to building your practice:

[Secrets of Building a Better Plaintiff Practice](#). Seven Rules for Picking Cases.

[Ten Tips for Making Partner in a Plaintiff's Firm](#). Some thoughts on a random process.

These previous and other articles/videos can be found in the Learning Center section of www.BillDanielsLaw.com

William A. Daniels is a Trial Attorney with BILL DANIELS | LAW OFFICES, APC, in Encino, CA. His practice focuses on class actions, employment and serious personal injury cases. A graduate of Loyola Law School of Los Angeles, he is a member of the Consumer Attorney Association of Los Angeles Board of governors and a founding member of the Civil Justice Program and the 21st Century Trial School at Loyola. For several consecutive years he has been named a "Super Lawyer" Los Angeles Magazine in Southern California.

He can be reached at William.Daniels@BillDanielsLaw.com; www.BillDanielsLaw.com