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Solo and Small Firm Evolution:

A Practical Guide to Managing Change

By Kim Covert

THE CANADIAN
BAR ASSOCIATION

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Introduction

INNOVATION FOR SMALL AND SOLO PRACTITIONERS

Innovation is a buzzword thrown around so frequently these days that it's almost lost all definition – what is innovation, anyway? It could be anything from improving your manual processes by implementing a new billing system, to incorporating artificial intelligence into your practice. Innovation is any big thing and any little thing that helps you work better, to serve your clients more efficiently and more effectively.

This workbook is based on interviews conducted with legal innovators – people who've found a new way of doing things that help them better serve their clients. We've taken the subject areas of those interviews and developed a set of innovation tools specifically designed for the unique challenges faced by small and sole practitioners, who often lack the time and resources to study and implement changes. This book includes worksheets, checklists and strategy guides to organize your thought processes as you consider whether it would be worth it to adopt any of these innovations in your own firm.

As you complete any of these exercises, keep these four questions in mind:

1. How could this benefit my clients?
2. How could this benefit my staff and me?
3. What help would I need to implement this?
4. How can I build this into my practice?

We hope you find these exercises helpful.

Managing change in your firm

No profession built on precedents is going to be all that good at change, but when your clients start demanding change, you need to listen. While it's true that not all change is progress, it's also a fact that everything must change at some point – you'll want to move offices or change file-management systems or switch to fixed fees, and so on. It's also a fact that as long as there's more than one person in your firm, the planned change is bound to meet resistance from some quarter.

Experts say the secret is in the planning. Applying some project management techniques here will help smooth the transition. Answering these questions will help you focus on what the importance of the change is for the firm, and develop a plan for dealing with it.

1. **What does success look like?**
   - Define your goal – what is it that the change is meant to achieve?

2. **Why this, why now?**
   - Outline your reasons for choosing this type of change at this time.

3. **What's wrong with the status quo?**
   - What are the risks of not undergoing this change?

4. **What's in it for the firm?**
   - How will the firm benefit from the change?

5. **What's in it for me?**
   - How will partners/employees benefit from the change?

6. **What can go wrong?**
   - Identify roadblocks and strategize how to overcome them.

7. **Who's in charge?**
   - Project sponsor – Executive member who will help the project manager deal with strategic issues
   - Project manager – The person in charge of planning the change and ensuring the plan is executed on time and on budget
   - Stakeholders – The people who need to be consulted about the change / who need to buy in

8. **How much money are you prepared to spend?**
   - Optimal budget ______________________
   - Contingency allowance _________________
   - Total allowable outlay___________________

9. **How much time do we have?**
   - When do you want the change to be completed? ____________________
   - What's the drop-dead deadline? _____________________
   - Why is that the deadline? ___________________________

Communicating change

Proper planning is one key to a smooth transition, no matter what kind of change your firm is undergoing.

Another key is proper communication about that change, especially if you're experiencing pushback – from staff, clients, your board, suppliers, etc. Resistance usually takes one of two forms: "I don't want to do things differently," or "I don't like uncertainty, not knowing what this means for me." Generally, the best strategy for overcoming both kinds of resistance is to be as open and honest as possible about the reasons for the change and the expected impact on staff. Even a person who doesn't like the change can be convinced about necessity for it, and transparency helps to dissipate some of the uncertainty surrounding any upheaval.

Your communications plan should cover the length of the project, and include communications at regular, pre-determined intervals, so that everyone is aware of the progress made, and what to expect next.

Some things to consider:

1. **What's it all about?**

   In a town-hall-style meeting or mass email, introduce the 5Ws of your project:

   What is it?______________________________

   Why are you doing it?______________________________

   Who will be affected?______________________________

   When will it happen?______________________________

   Where is the downside?______________________________

   How's it all going to come together? ______________________________

2. **What happens next?**

Break the plan into phases, approximate deadlines and schedule staff updates.

Phase	Deadline	Progress report to staff
1		
2		
3		
Project completion		

3. **Turning 'no' to 'yes'**

An employee, regardless of where they fit in your organization, who hasn't bought into the program can be like a pebble in your shoe – maybe not enough to slow you down at first, but irritating, and soon your whole body is out of sorts. Best to deal with the problem early on.

- Identify employees most likely to push back

____

____

____

- Identify reasons for the pushback and develop responses

____

____

____

- Address those concerns
  - ☐ Meet face-to-face with resisters
  - ☐ Listen to their reasons for resistance, discuss what will allay their fears
  - ☐ Do your best to resolve the issue but be firm about the project going ahead

CHANGE MANAGEMENT COMMUNICATION PLAN CHECKLIST

Did you clearly:

- ☐ Explain what will be changing
- ☐ Show why the change is necessary
- ☐ Define the scope of the project – who and what will be affected by it
- ☐ Explain the benefits of the change
- ☐ Convey what will happen if there is no change
- ☐ Identify who's in charge and the chain of command
- ☐ List achievable milestones for the project
- ☐ Communicate the plan to all stakeholders
- ☐ Speak to employees who are resisting about why, and how their concerns can be allayed
- ☐ Address roadblocks
- ☐ Schedule progress reports for staff along the life cycle of the project

Is a virtual office right for you?

Some lawyers are at home in wood-panelling and corner offices, others like the flexibility (and lower cost) of working at their kitchen tables, or being able to provide a full range of services wherever the day takes them – something technology is making increasingly easy to do.

Going fully virtual is certainly possible, depending on your firm's size and your clients' expectations, but there are a number of levels between wood panelling and a laptop in a coffee shop. For example, as a sole practitioner, renting an office in a shared workspace might be enough. For a small firm, giving everyone the tools to work remotely but providing a small office with meeting space and "hot desks" or work stations for when they need to be on-site could do the trick.

Would going virtual – or some variation thereof – work for you?

First let's look at what a bricks-and-mortar office has that you need for your practice. Check all that apply, then rank them in order of importance.

For each of those items, determine whether there's an alternative that you can work with – for example, if you like a private office, one alternative might be setting up an office space in your home, or renting a space in a workspace sharing collective. Office equipment like printers and scanners are now portable enough to carry around if you need them. An answering service could take the place of a receptionist.

For example:

	What do I want in an office	Rank	Alternative
x	Dedicated workspace	1	Home office, rented workspace
x	A place to meet clients	2	Rented workspace
x	Receptionist	3	Call answering service/split expense with others in a shared workspace

	What do I want in an office?	Rank	Alternative
	A dedicated workspace/private office		
	A professional/prestigious address		
	Close proximity to the courts		
	Close proximity to clients		
	A non-cellular phone line		
	Receptionist		
	The ability to collaborate with colleagues		

	What do I want in an office?	Rank	Alternative
	Billing or accounting support		
	Meeting space (boardroom)		
	File storage		
	Library		
	Office equipment (photocopier, mail, etc.)		
	Legal software		
	Computers		
	Computer security		
	Assistant and/or paralegal		
	Other		

Now, plot it out – write down what you need from an office in your ranked order, then check off the kind of office that makes each item available in a format you find appealing. This exercise should give you a better idea of your next steps.

For example:

What I want in an office	Virtual Space	Shared space	Smaller office
Private Workspace		x	x
A place to meet clients		x	x
Receptionist	x (answering service)	x (shared expenses)	x

What I want in an office	Virtual Space	Shared space	Smaller office

NOTE: Another important consideration is the cost – both start-up and ongoing – of whatever type of office you choose. Work out the financials – including tax implications – to determine what's really best for you.

GOING PAPERLESS

First of all, no office is likely to be truly paperless until every office is paperless. Even start-up firms that have never used paper will have paper thrust upon them – or will be asked to provide it. That's simply how it's going to work. That said, you can reduce your in-office paper use to virtually nothing – and maybe train those you deal with to do so as well – if you plan properly.

We're going paperless!

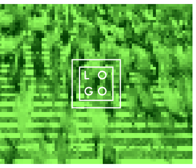
- Why are you going paperless? Define your reasoning, whether it be environmental or economical or somewhere in between, and clearly enunciate it.
- Make sure you have buy-in from within the firm – if there is pushback, determine the reasons and try to find solutions before the transition. Try to engage those who are recalcitrant in the process.
- Clearly communicate to those in your firm, as well as your clients and others you deal with as part of your work, that you plan to go paperless – that means intake, correspondence, invoices and supporting documentation will no longer be available except electronically. Your engagement letter might be a good place to let your client know, and also to obtain consent not to keep originals of any paperwork.
- Set a deadline for the transition and ensure that everyone concerned is aware of it.
- Consider whether it would be worthwhile to hire a consultant, such as a change manager, to help make the transition.

How do we go paperless?

- Do a study of your office's paper use – how much of it goes to letters, how much to client files, etc.
- Once you've determined where you use the paper, determine whether and how you can stop using it – digital letterhead, for example, and digital files.
- Set clear rules governing what you will continue to print (for example, key working documents, expert reports, submissions to the court, etc.); who will have permission to print and in what precise situations.
- Decide how you will monitor in-house printing. Perhaps you will need to get rid of almost all printers, maintaining one or two (for backup) in public locations – or maybe you will get rid of all of them and rely on nearby copy places on the rare occasions you need copies.
- What will remain electronic only? (For example, documentary production, service of records on opposing counsel; electronic copies to clients.)

But what do we do with all that paper?

- Make sure you have the necessary equipment: A scanner and software to convert scanned files into PDFs.
- Do you need clients' consent to destroy paper files? Check the rules with your law society.
- Decide how long you will keep paper copies as a backup, and arrange for safe destruction after that period.
- If you don't already have one, set up a secure backup system, to house both closed files and current files. Computer experts say this system should be separate from your in-house software system so that it will be secure in case of threats from hackers or natural disasters, etc. If you're relying exclusively on electronic files, this is more important than ever.
- If you haven't already done so, adopt a document-naming convention and protocols on where to file the electronic versions.
- Every existing office will have closed files that will need to be dealt with according to law society regulations for secure file maintenance. What are your local law society's rules governing secure electronic storage of privileged client files?
- Set up an electronic file management system – and use this opportunity to evaluate how you store and manage matters. There are a lot of data management systems to choose from these days. If you have hired a consultant, he or she can help you decide on a DMS that is suited to your needs, otherwise you will need to do some research to find one that's right for you.
- Scan paper files into PDF format and archive them in your electronic file management system. (Hiring part-time staff for this might be your most cost-effective option.)



What's my brand?

We're all familiar with brands for products. A less familiar, but growing, preoccupation is with personal brands – the things that people think of when they think of us.

A brand is much more than a logo, it's a personal profile, it's a perception. And it touches everything you say and do, in person and – these days especially – online.

A majority of your prospective clients will check out their potential lawyer's internet presence before stepping foot into the office. They'll look for reviews, check out your web page, see if you're on any social networks, and what you have to say there. And they won't limit themselves to checking out your professional credentials – they'll take a little bit of everything available.

Developing a brand and then living that brand will help ensure that every time people ask about you – whether they ask friends or Google – they'll get roughly the same answers.

This exercise will help you figure out what your professional brand should be – and how to build it.

FIND YOUR ADJECTIVES

William Arruda, founder of Reach Personal Branding, says there are seven questions to ask when uncovering your personal brand:

1. What do you do better than anyone else?
2. What are your top principles?
3. What is it that clients come to you for?
4. What do people praise you for?
5. What adjectives do people use to describe you?
6. What makes what you do, or the way you do it, unique?
7. What energizes or ignites you?

To each of these questions, narrow your answer down to one or two words, for example:

1. Close deals
2. Fairness
3. Personal attention
4. Empathy
5. Smart

6. Personal attention
7. Volunteering

WRITE YOUR VALUE STATEMENT

Distill all of those answers into a sentence about yourself – this is similar to your elevator pitch (see the section on Networking), but where that's a sales pitch, this is a value statement. For example: "I'm a smart, fair-minded deal-closer who treats clients with empathy, provides personal attention to their cases and gives back to the community by volunteering."

Parse that sentence – does it say everything you want clients to think about when they hear your name? Change anything that doesn't feel quite right until you have a fairly short sentence that you believe taps into the essential qualities that you bring to your job.

Keep in mind that, as William Arruda says, authenticity is key in developing a personal brand because it's exhausting to try to be something you're not. While it's fine to make some of your value statement aspirational, and we all have bad days, make sure that it doesn't say anything you can't pull off 95 per cent of the time. This statement is you, working.

EXAMINE YOUR FOOTPRINTS

Step back and look at yourself in your professional world the way others – other lawyers, current and prospective clients – would:

1. **Your office**

   How does your office reflect your value statement? If one of your adjectives is "polished" and your office needs paint and new carpeting, you might want to set aside some cash for renovations, or a move.

2. **Your website**

   If your brand says "successful modern lawyer" and your website says "I haven't been updated for 15 years," it's time to update your website. (Actually, it's time to update it anyway.)

3. **Social media**

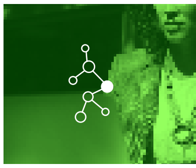
   Every time you engage in a public-facing way on a social media platform, it should be in a way that promotes your brand. So it's best to keep your personal Facebook page private and to create a professional page that only shows things that reflect your brand, with your value statement guiding what kind of content you provide. If your brand is "no-nonsense professional," don't post anything nonsensical unless it somehow promotes you in a positive light to others – for example, if you dress up as a clown as part of your community volunteering efforts (and you're sure none of your clients is afraid of clowns), then post a photo. But if it's important to you, volunteering should be part of your brand.

4. **Board positions/volunteering**

   People choose their causes for their own reasons. Some people will judge you by the organizations for which you volunteer and give you the thumbs-up or –down based on it, particularly if the agency or organization displays political, religious or some other kind of bias. You might want to take that into account when creating your public professional profile. You might not bring your politics to the office, but the perception could cost you some work.

5. **You in public**

   Whenever you're in public, you have to be aware that you are your brand, and everything you do can polish or tarnish the brand. It doesn't mean you can never have crazy fun again, just that you have to be very careful of who's watching, who's taking pictures and where they're posting them.



Putting the work into networking

For the small or sole practitioner, networking and business development are often the same thing. Everyone you meet is a potential client, or helpful connection, or source for a referral, particularly in smaller communities.

The best networking is probably organic, because it feels natural – you meet someone at your kid's soccer game, or waiting in line at the coffee shop, who just happens to need a lawyer. And in a perfect world that's how it happens. But if you're just starting out, or offering niche services, you'll likely have to put more work into it, whether you're trying to drum up potential clients or developing a referral network. The trick to working a networking gathering is not to go into it without the proper preparation. That means knowing who will be there that you should meet, knowing what to say to them and knowing what to ask.

MEETING

Identify at least three people who will be at the gathering whom you should meet. Find a point of reference – did you go to the same school? Have children the same age? Identify someone who can introduce you and have something ready to say if you're not joining a conversation already in progress. LinkedIn can be an excellent starting point for research.

Need to meet	Company name	Position	Who can introduce you	What do you know about him/her	Icebreaker

INTRODUCTION

Depending on the kind of gathering, whether it's business-related or purely social, you'll have a certain amount of time – likely not very much – to present yourself as someone the other person should know. You need an elevator speech for each of your must-meets. And you need to be able to gracefully exit the conversation – preferably with contact details and a potential next meeting.

Point of common interest	3 things they need to know about you	A question to ask them	Exchange details? Coffee date?
	1. 2. 3.		
	1. 2. 3.		
	1. 2. 3.		

Finding your networking strategy

When you're just starting out, a scatter-shot approach to networking may pay off – the more people who know who you are and what you do, the better chance that someone will give you work. But if you're more established – or even if you're starting out and want to establish yourself as a subject-matter expert – it can be more efficient to make targeted connections. This takes work and planning. And as we all know, people who set goals are more likely to get things done.

SET NETWORKING AGENDA

Why am I networking?

1.
2.
3.

Set networking goals

1. I want to make ___________ contacts by _________
2. Success = _________ Referrals or ________ New clients

Set your focus

What connections do I want to make, and why?

Name	Firm	Position	Best result / Goal

Then, set up a table – or use a customer relationship management program – to record your progress, for example:

Contact name	Date/method of contact	Action initiated	Response received	Follow up
John Smith	Email June 4	Lunch invite	Accepted June 6	Thank you post-lunch
Jane Doe	Met at PTA	Coffee June 10	accepted	Sent info on speaking topics

Contact name	Date/method of contact	Action initiated	Response received	Follow-up

Set networking framework

How will you spend your networking energy?

1. I will cold-call ______________________ by ______________________
2. I will attend ______________________ conference to meet ______________________
3. I will ask ______________________ to introduce me to ______________________
4. I will join ______________________ to improve my chances of meeting ______________________

Set up your elevator pitch

Remember your five Ws – who you are, where you are, what you are good at, why they should want to know you, and when can you meet again to discuss it more formally. Your elevator pitch should be no longer than two minutes – and practise delivering it smoothly!

Who –

What –

Where –

Why –

What's next –

(See What's My Brand for more information on best ways to promote what you're about.)

Set your own agenda

One good way to network is to give presentations as a subject-matter expert to organizations where you can meet potential clients or potential business contacts.

One of the best ways to establish yourself as a subject-matter expert is to present yourself as one to organizations who can bring you in to speak on your chosen topics to their members. For example, if you're an estate lawyer, you could do a good business speaking to seniors' clubs or service clubs, which will have an audience who needs the information you have to offer, likely needs your services, and would probably be open to bringing you back to speak on a number of subjects. Make sure you can deliver the goods though – don't claim expertise when you have only a passing knowledge.

1. Consider which groups bring in speakers, and which have the audience best suited to your interests and expertise:

   ___ Local service clubs

   ___ Local associations

   ___ Seniors' clubs or community groups

   ___ The public library

   ___ Chamber of Commerce

   ___ Provincial law society

   ___ CBA

   ___ Other

2. Pick one to three subject areas that you'd like to speak on (you can add or subtract later).

____

____

____

3. Find out who books the speakers at the organizations you've identified, and talk to that person, tell them what you have to offer and find out what they're looking for as well as what their speaker schedule is. Set up an appointment with yourself to call that group back in a few months if they don't have a current opening – you don't want to be a pest, but you want to keep your name top-of-mind.

____

____

4. Prepare a presentation on each of the topics – make sure you have a solid 20 minutes of material to speak on, and enough information to cover another 10 minutes of questions from the audience. You should always have more information prepped than you need – among other things it's a confidence-booster to be over-prepared. Create props if appropriate, including informative slides (though if you're using slides, make sure the venue has the necessary equipment, or bring it yourself), posters or anything else that helps you tell your story. Consider how to make your presentation interactive, as that helps to engage the audience.
5. Make sure that your presentation is as professional as can be – ask people to watch you and tell you whether you "umm" and "aaah" too much, or fidget in a distracting way. Taping yourself is also helpful, though it can be hard to watch, as few of us like the way we sound or look on tape. Another option is to get some training – join Toastmasters, or hire someone to do TED-type training with you.

Being social

Not all social media platforms are created equal, particularly when it comes to using them to promote your law practice. So before you go spending your time, money and precious energy on trying to be all things to all platforms, it's worth it to figure out which ones will work best for you. There are a lot of articles online that can be helpful for sorting out the platforms available (just do a search for "what social media platform is best for my business?"), and this worksheet will help you figure out which ones to focus your efforts on based on what you want to accomplish.

Keep in mind that once you create a social media presence for your business, you have to continue in order to maintain followers' interest. Each platform has a recommended number of posts: for Facebook it's one or two posts a day; same for Twitter. LinkedIn needs at least one post a week. If you blog, you should have one or two blogs a week. In all of these cases, it doesn't have to be original content, you can retweet or post interesting articles, etc. As long as you're posting links to the original publication, and not republishing, you don't need permission. For example, if you find an interesting article, to briefly say why you're interested, or why you think someone else would be, then link to it.

> *If you want an online presence, you need a good website. It's worth investing in a professional web design for your site – it's the place potential clients will go first, and they will judge you based on what they find. Think of your website in terms of personal grooming – a 20-year-old site that isn't readable on mobile devices is like meeting a client with stains on your shirt and dirt under your fingernails. It makes a really bad first impression, as do spelling errors and bad grammar.*

SET YOUR SOCIAL MEDIA GOALS

Why do I want to communicate?

- ☐ To publicize my firm
- ☐ To communicate general information to my clients
- ☐ To stay in touch with my clients
- ☐ To raise awareness about my legal specialty

- ☐ To develop a network for speaking opportunities
- ☐ To influence public opinion
- ☐ Other ______________________________

What do I want to communicate?

- ☐ General legal information of use to my clients
- ☐ Summaries of cases that will have an impact on my clients
- ☐ Opinions on cases that will showcase my expertise
- ☐ Information about interesting legal issues
- ☐ Responses to proposed legislation
- ☐ Straight facts
- ☐ Opinion pieces
- ☐ News about me and my practice
- ☐ Photographs
- ☐ Other ______________________________

Who is my audience?

- ☐ Clients
- ☐ Potential clients
- ☐ Other lawyers
- ☐ Politicians
- ☐ Media
- ☐ General public

Which is my favourite social media platform?

- ☐ I was born to blog
- ☐ I'm always on Facebook
- ☐ LinkedIn gives me the best leads
- ☐ I could spend hours on Twitter
- ☐ Other ______________________________

When will I find the time to create content?

- ☐ I'm on Twitter anyway, I'll tweet while I'm there
- ☐ I'm on Facebook anyway, I'll create content while I'm there
- ☐ I can commit to one or two blog posts a week, which I'd share with Twitter, Facebook and LinkedIn
- ☐ I'd hire someone to create content for me

Where is my audience most likely to be found?

- ☐ Twitter
- ☐ Facebook
- ☐ LinkedIn
- ☐ Blogs

How much time do I want to devote to the project?

- ☐ _____ minutes a day
- ☐ _____ minutes a week
- ☐ _____ hours a day
- ☐ _____ hours a week

PICK YOUR PRIMARY PLATFORM

Now that you've given some thought to what you want to accomplish with your social media engagement, and how much time you'd like to spend on it, it's time to pick your platform. At least in the beginning you should pick a primary platform and build a following there, but cross-posting is always an option – for example, you can set up WordPress to post to Twitter, Facebook and LinkedIn every time you publish a blog and you can arrange it so that your tweets appear on Facebook.

This quiz will help narrow it down:

- ☐ 1. My audience is mostly on Twitter
- ☐ 2. My audience is mostly on LinkedIn
- ☐ 3. My audience is mostly on Facebook
- ☐ 4. My audience comes to my website, where I can direct them to my blog

* * *

☐ 1. I want to send out quick, sharp blasts of information to clients, fellow professionals and the general public

☐ 2. I want to communicate with my professional community

☐ 3. I want to meet my clients on a platform that is both personal and professional

☐ 4. I want to give my clients something extra when they come to my website

* * *

☐ 1. I want to put my professional persona out there as a thought leader on cultural and political issues

☐ 2. I want to establish myself as a legal professional, and develop a network for referrals or speaking opportunities

☐ 3. I want to push out general legal information to clients and others who might find me on Facebook

☐ 4. I want to provide articles containing general legal information to clients and others who might visit my website

* * *

☐ 1. I don't have a lot of time to devote to social media

☐ 2. The time I have varies, I could write an article every now and then, or more often participate in discussions among my peers

☐ 3. I would be able to post often enough to maintain interest in my Facebook page, which might mean linking to other articles, or writing short pieces of topical or timely interest

☐ 4. I'm interested in writing short pieces of topical or timely interest or longer, more considered articles containing general legal information for my clients

* * *

☐ 1. I'm somewhat interested in taking a political stance, responding immediately to news items about government action or inaction

☐ 2. I'm more interested in developing a professional following than a political one

☐ 3. If I were to comment on news items it would be to explain to my clients what the developments mean to them

☐ 4. If I were interested in discussing political advocacy, it would take the form of blogs explaining my position and how a given policy affects my clients

If you answered mostly

#1, your place is on Twitter – that's where your audience is, it's likely where you feel most comfortable and you don't have time for deep dives into policy.

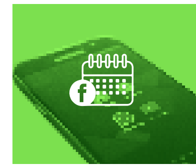
#2, your best bet is LinkedIn. It has been called "Facebook for professionals" and if you're interested in establishing yourself amongst your legal peers and some potential clients, that's the social media platform for you. You can set up a personal page, join existing communities and discussion groups, and use it as a very effective networking tool.

#3, go to Facebook. Particularly if your audience is over 25, this is the place to be. Facebook ads can be had relatively inexpensively, which will push your professional page out to those who don't know you, and you can rely on goodwill to get a certain number of those who do know you to "Like" your page, which helps build your brand. It's more Ford than Lexus, but if that's your client base, that's what you want. Posts here can be less formal than on LinkedIn, and you have a certain amount of freedom – as long as you post regularly, you can do quick status updates, links to articles by other authors, post your own articles (short or long) and photos.

#4, you have the time and interest to start your own blog. You can set up a blog page on your corporate website, or start a separate one on a blog hosting site such as WordPress, though if you do that you will have to cross post or publicize it somehow in order to build a following – no one will come if they don't know you're there. A blog can be anything you want it to be, and can hold elements of all the other websites – you can post photos, quick, sharp commentary, short analyses or longer think-pieces, it can be personal or professional or both. The important thing to remember is that whatever you do, it has to reflect your brand. Also remember that this option will take the most work as you not only have to commit to a regular posting schedule, but also have to spend time and effort bringing people to your site and building a following.

There are of course other social media platforms out there, including Instagram and Snapchat, but at the current time they're not recommended for legal professionals because among other things, your audience is unlikely to be found there. That said, Instagram is starting to look more viable, and if you're already on the platform personally, you're in a better position to judge whether it would do you any good on a professional level.

Creating your firm's social calendar



The key to succeeding on social media is consistency. So once you've determined the platforms you're going to use, your audience, and the content you want to share online, it's important to create a social calendar to make sure you aren't left scrambling at the last minute for something to say.

REMEMBER THESE KEY STEPS: RESEARCH, PLAN, SCHEDULE, CURATE & CREATE, ENGAGE, AND MEASURE.

Research

A good way to make your posts stand out is to tie them to something relevant going on in the world. For example, if you're a tax lawyer, you'll want to make sure you have posts ready for the high points of tax season, as well as throughout the year, offering reminders and useful information. Scour the internet and other sources for useful events and occasions and think outside the box. Valentine's Day might be a great time to talk about the tax implications for common-law couples – or single people. The month of June, a traditional favourite for weddings, might work for a series on financial planning and tax implications for newlyweds. You can keep a curated source list using apps like Feedly.

Plan

Decide which days you will intentionally be active on your social media platforms. You can tweet or post a photo on Facebook anytime, of course, but there has to be a foundation of consistency to your offerings. And then plan what you're going to do on those days. Remember it is better to be great on one platform than mediocre on several; also it is better to under-promise and over-perform than vice-versa. Don't be afraid to start out slow, developing a rhythm and a following on one platform before adding others.

Platform	Monday	Tuesday	Wednesday	Thursday	Friday
Blog	Blog (Twitter, Facebook, LinkedIn)				
Twitter		International tax freedom day tweet			
Facebook		International tax freedom day status update	Facebook video primer on tax forms		
LinkedIn					Share interesting article

Posting on Twitter and Facebook needs to happen more frequently than depicted here; blogs and LinkedIn don't need to be updated as often but it must be done consistently.

Schedule

Work backwards to create your schedule. Mark three sets of dates on the calendar. Using taxes as the example because they have their own built-in schedule, here are some ideas:

- Note tax filing deadlines, personal and corporate, RRSP deadlines, etc., as well as other events and occasions
- Figure out the optimum time to remind your audience in advance of those dates – a reminder that RRSP contributions need to be made by the end of February is no good on Feb. 28 or March 2. This is your posting date.
- Count back the time you'll need to create the post by the posting date, and mark that as your creation date.

Remember, everything that CAN be done in advance SHOULD be done in advance, and the better your research about dates and events that you can use as a basis for content, the more content you can create in advance. Tools such as HootSuite, Automate or Buffer can help you schedule your created content for later posting.

Curate and Create

Curated content – sharing articles written by others – is a great way to maintain a posting schedule without having to do all the content-creation yourself, but it does mean you need to devote some energy to finding articles your audience will find interesting, and saving them to deploy at times when you don't have the time or inspiration to create something yourself.

Keep a list of articles you want to write, if you're blogging – the inspiration can come from anywhere, client questions, items in the news, the events on your calendar, and so on. It's good to always have a few ideas on hand, and to always have a few written blogs/Facebook/LinkedIn posts in your pocket for the slow days.

Engage

When people respond to your posts, answer back – people want to know that they've been heard and understood.

The exception for this is called "Don't feed the trolls."

Trolls are generally recognizable by their comments' lack of relevance to what you posted, their use of bad language (both ungrammatical and profane) and the sense that they're just itching for a fight. Nothing you say will ever turn them back into reasonable people online so if you try to answer them reasonably (by explaining what you think they might have misunderstood, for example) and they respond by ramping up the vitriol, disengage immediately. Block them if you can, and report them if they're highly disruptive or offensive, or if they threaten you in any way.

Measure

Every social media platform, including your own website, has built-in tools that allow you to measure engagement – how many people visited, how long they stayed, what they looked at while they were there, etc. – beyond likes and shares and retweets. Tools such as Hootsuite and Buffer, et al, are also helpful. Paying attention to these "metrics" helps you know what kind of posts resonate with your readers – and which ones don't; you can even map out the days and times they're most likely to visit your site – Monday morning at 8, for example, which would mean you should make an effort to have something new to offer first thing every Monday. Being able to target your social media means getting a bigger bang for your buck – and your time and effort.

Also, you should know what success means to you. Establish achievable goals for your social media engagement related to the social media goals you set out above – for example, one new client a month, or 1500 likes, for instance – and if you don't reach those goals within a set period, reevaluate what you're doing on social media by using the measurement tools to see how you might do better, or more effectively spend your resources.

Resources

There are all kinds of resources to help you manage your social media profile. Hootsuite will not only help you schedule your social media activity in advance, it has lots of online short courses to help you use the tool to its fullest extent. Some of this is free, some isn't. Tweetdeck is Twitter's scheduling tool – it will help you follow Twitter feeds of interest, and you can schedule tweets well in advance.

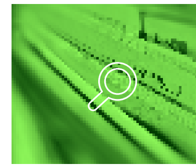
You can use your Outlook calendar to plot the reminders, but if you're planning to be active on several platforms at once, that could become confusing. There are social media calendar templates on line, look around until you find one to suit you.

There are also pages and pages of information online about conducting social media campaigns, if you want to explore the idea more fully.

Some community colleges offer online courses in social media engagement and measurement for relatively low tuition and this might be the information you need to start.

And it's never a bad idea to hire an expert to help you out, at least in the beginning, or you can outsource your whole social media presence to people who know what they're doing – retaining, of course, your right to approve any posts.

Wanted: Lawyer



Hiring can be stressful for any organization, but especially so if you're a small firm where the right fit is crucial. Part of the secret to hiring the right person is knowing what you're looking for – while remaining open to the idea that the right person might have something you weren't looking for at all.

YOUR HIRING TOP 10

In the workbook that accompanies his best-seller What Colour is Your Parachute, Richard N. Bolles outlines a prioritizing grid for ranking 10 or fewer variables. We're appropriating the idea here without adopting the grid itself.

1. List the 10 things you're looking for in a new hire in no particular order, but making sure they tie in to your brand and values. If you have more than 10, break them down into representative sub-groups (traits, characteristics, attributes, qualifications, etc.) and repeat the process with each:

    1.

    2.

    3.

    4.

    5.

    6.

    7.

    8.

    9.

    10.

2. Compare two items at a time and decide which item in each group is more important to you. Write the winning number down.

   1 v 2 ___ 1 v 3 ___ 1 v 4 ___ 1 v 5 ___ 1 v 6 ___ 1 v 7 ___ 1 v 8 ___ 1 v 9 ___ 1 v 10 ___

   2 v 3 ___ 2 v 4 ___ 2 v 5 ___ 2 v 6 ___ 2 v 7 ___ 2 v 8 ___ 2 v 9 ___ 2 v 10 ___

   3 v 4 ___ 3 v 5 ___ 3 v 6 ___ 3 v 7 ___ 3 v 8 ___ 3 v 9 ___ 3 v 10 ___

   4 v 5 ___ 4 v 6 ___ 4 v 7 ___ 4 v 8 ___ 4 v 9 ___ 4 v 10 ___

   5 v 6 ___ 5 v 7 ___ 5 v 8 ___ 5 v 9 ___ 5 v 10 ___

   6 v 7 ___ 6 v 8 ___ 6 v 9 ___ 6 v 10 ___

   7 v 8 ___ 7 v 9 ___ 7 v 10 ___

   8 v 9 ___ 8 v 10 ___

   9 v 10 ___

3. Count up the number of times each of the numbers won the debate and enter it below:

   1 ____ 2 ____ 3 ____ 4 ____ 5 ____ 6 ____ 7 ____ 8 ____ 9 ____ 10 ____

The number that won most often is your top priority, and so on down the line. In the event of a tie, decide between the two or place them close together as being of relatively equal importance.

This will be your guide when drawing up your job description and your job posting.

What next?

When your job posting draws in far more applicants than you were prepared for, it's important to find a way to separate the wheat from the chaff.

A high-low matrix can help you winnow down what's most important to you – and who has it.

Identify the areas where you're looking for more experience than qualifications, and vice-versa, and where you want more of each – or where not having either isn't a deal-breaker, and enter those traits or characteristics into the grid. Then use a similar grid to sort your applicants by what they bring to the table.

Experience/Qualifications matrix

(We used experience and qualifications for this matrix, but you can use whatever variables you like to suit your purposes.)

Hiring a freelancer

When you have more work than you can handle, but not enough to bring on a full-time associate – or a long-term part-timer – who are you gonna call?

There's a real growth in the number of lawyers willing to freelance – and the number of firms offering freelance services, for both corporate and private clients.

Beyond checking their law society status and insurance, here are some things to keep in mind when you're planning to hire a freelancer:

- Where will the freelancer work?
  - ☐ A desk in my office where the freelancer can plug in a laptop
  - ☐ A desktop computer in my office
  - ☐ Client's office
  - ☐ Offsite at freelancer's workplace
- What specific work will be delegated to the freelancer?

  ____

- How long will the contract run?
  - ☐ Set term, subject to renewal
  - ☐ Until the case reaches ____________ (specify point)
  - ☐ Until the matter has been completed
- How much are you willing to pay?
  - ☐ No more than _______
  - ☐ _______ an hour for a maximum _________ hours per week/month
  - ☐ Set amount of _______ for a set period
- How will you pay?
  - ☐ Lump sum at end of contract
  - ☐ Retainer to start then in weekly/monthly increments
  - ☐ Do you share risk of not getting paid by client?
  - ☐ Other ________

- How, and how often, will you communicate?
  - ☐ Regular weekly reports
  - ☐ Regular phone calls
  - ☐ Regular in-person meetings
- How much direct contact with client?
  - ☐ As necessary
  - ☐ As necessary with prior approval
  - ☐ Other __________
- How will you define progress and/or success?
  - ☐ When the matter is concluded
  - ☐ When sides reach an agreement
  - ☐ Other __________
- Whose devices will the freelancer use?
  - ☐ Personal cellphone
  - ☐ Personal laptop
  - ☐ Firm cellphone
  - ☐ Firm laptop
  - ☐ Firm desktop
- If the freelancer uses personal devices, are they properly encrypted for confidentiality?
  - ☐ Yes
  - ☐ No
  - ☐ We have discussed upgrading before work starts
- How will you ensure the freelancer has access to relevant files only?
  - ☐ We will
  - ☐ Other ____
- Do you have a plan for backing up work product from the freelancer's devices to the firm's document system, and ending the freelancer's access to files?
  - ☐ Yes
  - ☐ Working on it

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