



# Going Solo: Getting Ready to Hang Your Own Shingle

## A Certificate Program

### Course Overview

This course is designed to assist attorneys in deciding whether they want to hang out their own shingle and start a solo practice. This course guides learners through the exploration of many of the necessary considerations and steps to successfully start a solo practice.

During this course, participants will:

- Explore effective strategies and tactics for setting up their own practice.
- Brainstorm ideas of how to market their services.
- Troubleshoot common errors made in billing and finance.
- Locate resources designed to assist and support them in their first year.
- Gain access to experienced facilitators who provide personalized education.

At the end of the course, participants will:

- Earn CLE credit hours in most jurisdictions (estimate 12 - 14).
- Receive a "Solo Practitioner Certificate" from the American Inns of Court.
- Leave with the elements necessary to create their own business plan.

The course is comprised of seven modules, each lasting one week. It will be offered as a facilitated self-study program, which is a combination of on-demand content, self-study and facilitator-led or monitored interactions. The materials and delivery methods will include:

- Live 1-hour webinars
- Videos and/or other animated content
- Articles and other publications
- Samples and templates
- Assignments (that cumulatively comprise a basic business plan that the participant can use; reviewed and critiqued by a facilitator)
- Group discussion threads (monitored/responded to by the facilitator)

While the course is designed to be completed in seven weeks, with each successive module made available each week, there is no time limit for completion. Each module will contain approximately one-and-one-half hours of content, with "assignments" requiring additional time. Ideally, the entire course would be eligible for between 12 and 14 hours of Continuing Legal Education credit. *(CLE approval will be sought only for those states needed by the participants.)*

The course will be held twice a year accommodating fewer than 20 participants per session. This number will encourage active participation and allow for substantive engagement by the facilitator.

Pricing:

- \$725 for active AIC members
- \$825 for AIC alumni
- \$925 for non-members



## Going Solo Preparatory Work for the Course

### COURSE OVERVIEW:

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#### START DATE: Upon registration.

There is some pre-work to be completed prior to the official start date, which includes:

- Discussion Thread (introductions)
- Course Syllabus (Document)
- Course Ground Rules & Expectations (Document)
- Course Management Worksheet (Template)
- The American Inns of Court Professional Creed (Document)
- Starting Out: What to consider before launching your own firm. (Article)
- Business Plan Worksheet (Template)

## Module 01: Getting Started

### THINGS TO CONSIDER BEFORE GOING IT ALONE

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#### START DATE: Sunday, May 5, 2024

In our week one module, you'll engage in both introspection and strategic thinking. We'll ask you to:

- Identify things that you enjoy doing in life and how you might convert that into your business activities.
- Dive into the business of starting up your own practice by discussing the information you need to be successful.
- Explore what might be in store for the legal profession in the next 5-10 years and beyond.
- Bring it all together during a live facilitator led Zoom conversation.

Here is an overview of the work you'll need to do:

- Complete the Passion-Purpose Worksheet and contribute to the discussion thread.
- Watch a short (~15 minutes) video on the considerations and challenges of going solo.
- Read an article on *How to Choose a Legal Practice Area*.
  - Set up a short (~15 minutes) informational interview with someone who practices the type of law you are interested in.
- Read the checklist on Business Management and Planning.
- Attend the LIVE WEB EVENT: A Facilitated Discussion with Dirk Jordan: **Thursday, May 9, 2024 @ 12:00 PM CT/1:00 PM ET (1 hour)**
- Complete the first part of your *Business Plan Worksheet*: **Firm Information**.

#### Module Components:

- Passion-Purpose Worksheet (assignment)
- Considerations and Challenges of Going Solo (presentation)
- How to Choose a Legal Practice Area (link)
- Business Management and Planning (document)
- Business Plan Worksheet: Firm Information (assignment)
- Going Solo: Facilitated Discussion with Dirk Jordan (live webinar)



## Module 02: Setting Up Shop

### MIND YOUR BUSINESS!

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**START DATE: Sunday, May 12, 2024**

In our week two module, you'll engage in more of the nitty-gritty of running a business. We'll ask you to:

- Identify many common pitfalls and things you can do to avoid them.
- Consider how to market your legal services.
- Explore the vast array of technology available to make solo practice possible: ease, efficiency and support that works best for you.
- Dive into goal setting and identifying metrics for success.

Here is an overview of the work you'll need to do this week:

- Watch a short (~15 minutes) video about possible legal pitfalls; contribute to the discussion thread.
- Watch a short (~15 minutes) video about legal marketing.
- Watch a VERY short (~2 minutes) video about artificial intelligence.
- Research a legal or business technology; upload the research and include a short summary in the discussion thread.
- Review a document on what's involved with practicing law remotely and apply those lessons to solo practice.
- Attend the LIVE WEB EVENT: A Facilitated Discussion with Kevin Miller: **Thursday, May 16, 2024 @ 12:00 PM CT/1:00 PM ET** (1 hour)
- Complete the second part of your *Business Plan Worksheet: Marketing*

Module Components:

- Potential Pitfalls and How to Avoid Them (presentation)
- Marketing Your Firm (presentation)
- Research: Technology Tools for Lawyers (link)
- What is "AI" anyway? (presentation)
- Clio's Complete Guide to Working Remotely (document)
- Business Plan Worksheet: Marketing (assignment)
- Going Solo: Facilitated Discussion with Kevin Miller, CEO of LegalSifter (live webinar)

## Module 03: Managing Your Money

### FINANCES FOR THE NON-FINANCIAL ATTORNEY

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**START DATE: Sunday, May 19, 2024**

In our week three module, you'll focus on the financials. We'll ask you to:

- Identify your personal financial needs and how they are different than business needs.
- Research possible funding streams for startup costs.
- Look at the financial end of practicing law.
- Explore some of the ethical grey areas of firm finances.



Here is an overview of the work you'll need to do this week:

- Review a financial worksheet and create your own.
- Watch a short (~10 minutes) video about personal finances.
- Watch a short (~10 minutes) video about professional finances and contribute to the conversation.
- Explore resources from the Small Business Association in your state or city and share other resources with each other.
- Attend and participate in a live discussion (~1 hour) with Larry Webb, District Director of the Small Business Administration: **Thursday, May 23 @ 12:00 PM CT/1:00 PM ET** (1 hour)
- Complete the fifth part of your *Business Plan Worksheet: Finances*

Module Components:

- Financial Worksheet (document)
- Personal Finances (presentation)
- Professional Finances (presentation)
- Research: Local Assistance - SBA (assignment)
- Show me the money! (assignment)
- Business Plan Worksheet: Finances (assignment)
- Going Solo: A Discussion with the Small Business Administration (live webinar)

## **Module 04: Building Your Reputation**

### **BUILDING CONFIDENCE IN YOUR ABILITIES**

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**START DATE: Sunday, May 26, 2024**

In our week four module, you'll focus on yourself! We'll ask you to:

- Find ways to build your reputation in the legal community.
- Research professional membership opportunities.
- Explore how legal writing can contribute to increases in both knowledge and reputation.
- Identify other opportunities to elevate your reputation.

Here is an overview of the work you'll need to do this week:

- Watch a short (~12 minutes) video about the whys and hows of building a reputation in the law.
- Learn about Professional Development and contribute to a discussion about CLE and professional memberships.
- Watch a short (~6 minute) video about positioning yourself to attract the clients you want.
- Watch 4 videos on how to use legal writing to enhance your professional profile.
- Research promotional "outlets" and contribute to a discussion on appropriate topics.
- LIVE WEB EVENT - Facilitated Discussion with Dirk Jordan: **Thursday, May 30, 2024 @ 12:00 PM CT/1:00 PM ET** (1 hour)
- Add more to the third part of your *Business Plan Worksheet: Organizational Overview*



#### Module Components:

- Building a Reputation (presentation)
- Professional Development (document)
- Positioning Yourself (presentation)
- Strategies for Maximizing Your Daily Legal Work (presentation)
- Writing for Bar Associations and Other Professional Organizations (presentation)
- Using Lessons Learned in Legal Writing (presentation)
- Considerations for Publication Writing & Editing (presentation)
- Research: Communicating Your Expertise (template)
- Business Plan Worksheet: Organizational Overview (assignment)
- Going Solo: Facilitated Discussion with Dirk Jordan (live webinar)

## **Module 05: Quality of Life and a Life of Quality**

### **CREATING THE LIFE YOU WANT**

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#### **START DATE: Sunday, June 2, 2024**

In our week five module, you'll focus on more difficult questions. We'll ask you to:

- Think about your relationships with family and friends.
- Identify potential professional relationships that can be mutually beneficial.
- Consider your boundaries in order to create and maintain the professional environment you want or need to be successful.

Here is an overview of the work you'll need to do this week:

- Watch a short (~9 minutes) video about the importance of building a support network.
- Watch a short (~11 minutes) video about who might be in your support network.
- Create a contact list of family, friends and colleagues that you can rely upon for different kinds of support.
- Read an article about the importance of maintaining your physical and mental health while working; contribute to the discussion.
- LIVE WEB EVENT:
  - Part One - Facilitated Discussion with Jeff Tenenbaum on business development: **Thursday, June 6, 2024 @ 12:00 PM CT/1:00 PM ET** (1 hour)
  - Part Two - Networking Happy Hour! (immediately following Part One)
- Complete the seventh part of your *Business Plan Worksheet: Business Goals*

#### Module Components:

- Building A Support Network: The Hows and the Whys (presentation)
- Building A Support Network: The People (presentation)
- Contact List for Solo Support (template)
- There Is No Work-Life Balance (article)
- Business Plan Worksheet: Business Goals (assignment)
- Going Solo: A Conversation with Jeff Tennenbaum & Going Solo Happy Hour (live webinar)





## Module 06: Being Part of a Professional Community

### PROFESSIONALISM IS THE KEY TO SUCCESS

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**START DATE: Sunday, June 9, 2024**

In our penultimate module, the focus is on practicing with professionalism. We'll ask you to:

- Define what legal professionalism is with a focus on civility and ethics.
- Recognize that positive and healthy relationships with other lawyers is good for business.
- Review the ABA's Model Rules of Professional Conduct and share thoughts on duties to clients and other attorneys.
- Research options for defining your role and how you work with clients.
- Explore ways to give back to your community and promote access to justice.

Here is an overview of the work you'll need to do this week:

- Watch a short (~20 minutes) video about the meaning of professionalism; contribute to a discussion on the potential pitfalls of professionalism.
- Watch a short (~10 minutes) video about building positive and healthy relationships with other lawyers; update and expand your contact list with colleagues that you want to develop strategic relationships with.
- Review sample legal services agreements and think about what to include in your own.
- Explore resources and information about access to justice and contribute to a discussion about making access to justice part of your practice.
- LIVE WEB EVENT – Open office hours with Dirk Jordan: **Thursday, June 13, 2024 @ 12:00 PM CT/1:00 PM ET** (1 hour) *optional*
- Review your *Business Plan Worksheet* to see how you can incorporate professionalism into all aspects of your practice.

Module Components:

- What does professionalism mean to you? (presentation)
- Relationships With Other Lawyers (presentation)
- The Model Rules of Professional Conduct and You (link)
- Legal Services Agreements (link)
- Access to Justice (document)
- Business Plan Worksheet: Professionalism (assignment)

## Module 07: The Hard Stuff

### INTERNAL AND EXTERNAL PRESSURES

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**START DATE: Sunday, June 16, 2024**

In our final module, the focus is on some of the less pleasant aspects of practicing law, many of which can be especially difficult for the solo practitioner. We'll ask you to:

- Reflect on specific ethical behavior and choices.
- Identify strategies for dealing with unpleasant client situations.
- Recognize that burnout and substance abuse are real in the practice of law.



- Explore your feelings about moving forward with solo practice.

Here is an overview of the work you'll need to do this week:

- Read 2 articles focusing on ethical challenges for solo practitioners and participate in a discussion.
- Watch a short (~10 minutes) video about dealing with clients who have (or who are!) a crisis.
- Watch the video lectures series (five videos) regarding Rule 1.16 (Declining or Terminating Representation) and contribute to the discussion.
- Review the information on managing reputational risk; contribute to the discussion on crises that might be particularly damaging to solo practices and what steps can be taken to mitigate them.
- Watch a longer (~45 minutes) video on wellness and addiction and how it may show up on yourself and/or your clients.
- Read an article on mindfulness and the practice of law; contribute to the discussion thread.
- Watch a short (~10 minutes) video where Dirk looks back on his solo career and lessons learned.
- LIVE WEB EVENT - Facilitated Discussion with Dirk Jordan: **Thursday, June 20, 2024 @ 1:15 PM CT/2:15 PM ET** (1 hour)
- Complete the final part of your *Business Plan Worksheet: Executive Summary*

Module Components:

- Ethics Column Articles from The Benchers (link)
- Clients in Crisis (presentation)
- Declining or Terminating Representation (link)
- Managing Reputational Risk (article)
- Wellness and Self-Care for Attorneys (presentation)
- Add Mindfulness to Your Wellness Toolbox! (link)
- Reflections on a Solo Career (presentation)
- Business Plan Worksheet: Executive Summary (assignment)
- Going Solo: Facilitated Discussion with Dirk Jordan (live webinar)

*Content inspired by Starting and Managing Your Own Law Practice, courtesy of Dirk Jordan, Esq., Adjunct Professor, The University of Texas at Austin School of Law, Master of the Bench member of the Calvert and Lloyd Lochridge American Inns of Court, and former trustee of the American Inns of Court Foundation. Thanks for sharing your knowledge and experience!*