

Law Practice Management and Technology
Spring 2019 Course Syllabus (version 1.0)
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SECTION: 429-A
TIME: Thursday evenings 6:40 p.m. to 9:50 p.m.
PROFESSORS: Neil Pedersen, Carolyn Dillinger

1. REQUIRED BOOKS.

- Jay G. Foonberg, How to Start and Build a Law Practice (5th ed. ABA Press 2004).
- Richard Susskind, Tomorrow's Lawyers: An Introduction to Your Future (2nd ed.)

2. OPTIONAL TEXT

- State Bar of California, The California Guide to Opening and Managing a Law Office (2008). There will be an adequate number of copies on reserve in the library for students to use if you elect to not purchase the book.
- Mark Homer & Jabez Le Bret, Online Law Practice Strategies [To purchase at a 50% discount, go to <https://gngf.com/book>. Use code WSCOL50 at checkout.]

3. ADDITIONAL READING MATERIALS.

You will be asked from time to time to read other articles written by or chosen by your professors to supplement the readings from the required texts. These additional reading materials will be found in the Clio software program under the Documents Tab and will be referenced in this Syllabus.

4. COURSE OBJECTIVES & GOALS.

Law Practice Management and Technology is a one-semester, three-unit course. It is a class taught by full-time practicing lawyers to future lawyers. It involves substantial effort and an investment of time. However the investment in time and effort should pay off big time when you leave law school and begin to enter the legal profession.

The class provides an overview of the issues and concerns a person must take into consideration when he or she becomes a practicing attorney. A special emphasis is placed on the decision to open a law practice. However, it is not limited to the nuts and bolts of running a law office. Rather, the course readings, lectures and exercises are intended to provide the student with an understanding of what is required to effectively practice as an attorney, and if desired, to start and maintain a law practice that will provide not only a living wage but also a satisfying life. It is hoped that by the end of the course, each student will be able to decide whether this is a road he or she wants to travel.

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Specific goals of the course include the following:

- You should be able to better understand the factors you need to assess to determine if going into the law business is right for you.
- You will be equipped to know what you should consider in deciding on a practice area, rather than let that decision be imposed on you by circumstance.
- You should have a basic structured understanding of what you need to do in the planning stages of opening your own firm.
- You should have some checklists and a basic understanding of the physical, technological and procedural infrastructure you need to create to efficiently operate a law office.
- You should come away with an understanding of the options available to you as to how you can carry out your law business, be it out of your home with a virtual office, in independent space or shared space, and whether it be as a solo, partner or shareholder or member of an entity.
- You will come away from this class with an idea of the future direction of the practice of law, including innovative new methods of delivering legal services to the client.
- After this class you will have a pretty good idea of how to prepare critical office processes and procedures, such as redundant calendaring systems, effective conflict checking procedures, mail processing and filing procedures, trust and general account procedures and more.
- You will be better equipped you to set and modify your fees and costs schedules, and to capture your time and get paid for it.
- You will have the tools to make efficient and productive use of your time by learning important time-management lessons.
- You will understand that you need to stay emotionally and physically healthy while you engage in your business in the practice of law, along with practical tips for how to do this.
- You will receive some solid advice and prepare you to become a developer of business – a rainmaker if you will.

- We intend to equip you to be able to select business that will be profitable and worth your time and effort while avoiding clients and matters that will drain your resources and your emotions.
- We intend for you to go away from this class with several helpful resources and ready-to-use documents you will use immediately upon the start-up of your new practice.
- We hope you will walk away from this class with a deeper understanding that ethics and professional responsibility are not just law school concepts and a test you have to take to become a lawyer, but an important daily part of the business of practicing law.

5. CLASSROOM PARTICIPATION.

Legal education is a cooperative venture. You must be prepared to participate in each class. If either of the professors believe you are unprepared or that you have not completed the work assigned to you at any given time during the course, you will lose one or more 0.1 grade points from your final grade for each such circumstance.¹

6. CLASS ATTENDANCE.

Attendance and participation are required for all classes.² Furthermore, just as it is inappropriate to show up for court late, being on time for class is required. Arriving late to class will be treated as a class absence. Similarly, leaving early or leaving for a prolonged period of time during class without prior permission will also be treated as a class absence.

Because of the cooperative nature of many of the assignments students may have no more than one (1) class absence (out of the 14 class periods we meet). Students who accumulate more than the permitted number of absences will be administratively dismissed from the class. You -- and you alone -- are responsible for keeping track of your attendance; you will not receive a warning that you have reached the allowed number of absences.

¹ Time allocations for topics being covered may have been mis-estimated. Therefore, you may be responsible for material we cover during two succeeding class periods. It is *your responsibility* to keep track of how far we have gone each week & be prepared for material that you may have read before.

² Each student, however, may be excused for *any* reason from *participating* in an *attended* class *once* during the semester by requesting an excuse from your professors prior to commencement of class that day. If you request an excuse by *e-mail*, you must send the e-mail the day before class to both Professor Pedersen and Professor Dillinger. Unless one of us confirms your request before class, however, you will not be excused.

7. PRE-RECORDED AUDIO LECTURES.

In addition to in-class lectures, Professor Pedersen has pre-recorded certain content in audio files you will be able to download from the Clio software under the Documents Tab. Where the Syllabus so indicates, you are required to download and listen to those pre-recorded lectures before the class session noted. The content contained in the pre-recorded lectures should be considered the same as content covered in class and should be part of the Business Plan you will prepare for the final class project.

8. EXAMINATIONS AND GRADING.

Your grade will be calculated as follows: Business Plan Grade: 75%; Coursework Grade: 25%. There will be no mid-term or final examination in this course.

Business plan grade will be earned in the following activities: Timely submission of an adequate benchmark product at first turn-in, timely submission of final work, completeness of business plan, organization of thought, clarity of plan, effort put into building of plan. [Note: Grade will be assessed only to the final product, but a failure to have a minimally acceptable product at the milestones can result in a reduction of the overall grade]

Coursework grade will be earned in the following activities: Time Invoices; Fears and Concerns Thought Piece; Intake Rejection Letter; Engagement Letter; and Termination of Engagement Letter. Some coursework will be prepared and submitted by a group of students. The grade on such an assignment will be given to all members of the group assigned to work on the assignment. It behooves you to be sure the group assignment completely satisfies your expectations.

The Business Plan and all coursework assignments will be graded on a 4.0 scale with one-tenth increments (i.e., 4.0, 3.9, 3.8 etc.). The average score of all coursework submissions will constitute your coursework grade.

9. EXPECTATIONS REGARDING PREPARATION TIME FOR COURSE.

This course involves substantial work outside of the classroom. Not only do you have readings from the texts and from other sources provided through the Clio portal, but you will be listening to pre-recorded lectures and preparing forms that you will later be able to use when you start practicing law. The business plan you will be creating will be the blueprint for your future law firm. You should expect to spend no less than two to three hours outside the classroom for every hour in the classroom. Many successful students have spent far more that.

10. FORMAT OF ASSIGNMENTS.

Unless otherwise specified in this syllabus or in the assignment, all assignments are to be submitted on 8-1/2 x 11 inch paper, with one inch margins all around. Use Arial 12 point font. Writings must be double-spaced. Put your name, not your student or exam numbers, on all assignments.

11. SUBMISSION OF ASSIGNMENTS.

All of the assignments in this class, except for those to be submitted on November 27, 2018 as final submissions, **are to be submitted both on paper and by email.** Assignments submitted on paper must be turned in to one of the professors in the ten minutes prior to the beginning of the class session in which the assignment is due. Both the Syllabus and the individual assignment memos will inform you of the class session before which each assignment is due.

For each such assignment, in addition to turning in the assignment on paper, those assignments must be submitted electronically by e-mail to both Professor Pedersen and Professor Dillinger prior to the beginning of the same class session, at the following e-mail addresses:

Professor Pedersen: npedersen@pedersenlaw.com

Professor Dillinger: carolyn@passionlawfirm.com

Assignments submitted by email must precisely use the following approved naming protocol in the subject line of the email: [name of assignment designated in assignment memo - your last name, your first initial].

Please do not submit multiple assignments in one email. A separate email should be used for each assignment being submitted by email.

If there are multiple documents associated with one assignment, please only use one email to submit the entire assignment.

Please be sure to double check before you hit the send button that the attachment you have attached is the document you intend to send. Similarly, please be sure you remember to attach your intended document before hitting the send button. Your professors do not immediately open your emails so such common email errors can result in your assignment being rejected and considered not timely submitted.

There are specific rules for how you should name the Business Plan assignment. This means when you attach the respective document to your e-mail the attachment must be named according to the following naming requirements:

- Business Plans: BusinessPlan.Submission#.datesubmitted.studentname

For example: BusinessPlan.2.2019.05.03.JaneDoe

A failure to follow the procedures set forth in this section can result in your assignment being rejected and considered not timely submitted. Please be sure to follow these protocols each time you submit assignments by email.

Only submission of an assignment in both manners (paper and digitally by email) will be considered timely submission. A paper submitted by email but not on paper at the beginning of class (or vice versa) will not satisfy the requirement of timely submission of an assignment.

All documents due on May 3, 2018 should be submitted only by email transmission.

12. DUE DATES FOR ASSIGNMENTS.

The deadline for submission of assignments in this course are found in your Syllabus and in the individual assignment memos. A failure to timely turn in an assignment will result in you receiving zero credit for the assignment. If you cannot attend a class where an assignment is due, or you will be significantly late to class, please be sure to forward your work to another student in the class who can turn in your assignment. No submissions will be accepted at any time after the end of the mid-class break.

13. OFFICE HOURS.

As adjunct professors and full-time practicing attorneys, Professors Pedersen and Dillinger do not maintain an office on campus. However, they will make themselves available to meet with students on campus or elsewhere, dependent on their work schedules.

Professor Dillinger's Office
Passion Law, PC
(949) 424-8200 x 103 (office phone)
(949) 637-2623 (personal mobile phone)

Professor Pedersen's Office
Pedersen Law APC
17910 Sky Park Circle, Suite 105
Irvine, CA 92614
(949) 260-1181 (office phone)

Finally, both professors will make themselves available for telephone conversations with students. To schedule a meeting or call, please send an email to the email address provided above at least 24 hours prior to the requested meeting or call.

14. RECORDING CLASSES.

If you want to record a class, you must ask for permission *in person in the classroom* before each class you wish to record. As a condition to recording a class, you must agree to making the recording available to every member of the class.

15. CLIO LAW PRACTICE MANAGEMENT SOFTWARE PLATFORM.

Many aspects of this course will be administered through and require the student to sign into the "LPMT Firm" version of the Clio Law Practice Management Software program. Assignment memos will be placed on that platform, and several assignments will be performed there as well. Instruction will be provided on the first night of class about how to access this program. There will be no charge to students for use of this program during the semester, which is provided at no charge by Clio.

16. DISABILITY SERVICES STATEMENT.

Western State College of Law provides accommodations to qualified students with disabilities. The Disabilities Services Office assists qualified students with disabilities in acquiring reasonable and appropriate accommodations and in supporting equal access to services, programs, and activities at Western State College of Law.

To seek reasonable accommodations, a student must contact Senior Assistant Dean Donna Espinoza, Student Services Director and Disabilities Services Coordinator, whose office is in the Students Services Suite 119. Dean Espinoza's phone number and email address are: (714) 459-1117; despinoza@wsulaw.edu. When seeking accommodations, a student should notify Dean Espinoza of her or his specific limitations and, if known, her or his specific requested accommodations. Students who seek accommodations will be asked to supply medical documentation of the need for accommodation. Classroom accommodations are not retroactive, but are effective only upon the student sharing approved accommodations with the instructor or professor. Therefore, students are encouraged to request accommodations as early as feasible with Dean Espinoza to allow for time to gather necessary documentation. If you have a concern or complaint in this regard, please notify Dean Espinoza; or please notify Dean Allen Easley at aeasley@wsulaw.edu or (714) 459-1168. Complaints will be handled in accordance with the College of Law's "Policy against Discrimination and Harassment."

17. WESTERN STATE COLLEGE OF LAW – PROGRAMMATIC LEARNING OUTCOMES

Western State College of Law's curriculum is designed so that every student achieves a level of competency prior to graduation in each of the eight Programmatic Learning Outcomes listed below:

Doctrinal Knowledge: Students will demonstrate knowledge of substantive and procedural law in the core curriculum subjects, including Contracts, Criminal Law, Criminal Procedure, Torts, Real Property, Business Association, Evidence, Civil Procedures, Constitutional Law, Estates, Community Property, Remedies, and Professional Responsibility.

Practice Skills: Students will demonstrate the development of other law practice skills. Each student's chosen outcomes within this category will be varied based on the student's particular interests, coursework and work experiences. They may include, but are not limited to, the following topics: oral presentation and advocacy; interviewing; counseling; client service and business development; negotiations, mediation, arbitration, or other alternate dispute resolution methods; advanced legal research and writing (excluding purely academic papers and the first four units earned in introductory first-year legal research and writing class); applied legal writing such as drafting contracts, pleadings, other legal instruments; law practice management or the use of technology in law practice; cultural competency; collaboration or project management; financial analysis, such as accounting, budgeting project management, and valuation; cost benefit analysis in administrative agencies; use of technology, data analyses, or predictive coding; business strategy and behavior; pre-trial preparation, fact investigation, such as discovery, e-discovery, motion practice, assessing evidence, or utilizing experts; trial practice; professional civility and applied ethics; a law clinic that includes a classroom component; or a legal externship that includes a classroom component.

Legal Analysis: Students will demonstrate the ability to identify the factual and legal issues implicated by a fact pattern and to appropriately use cases (including identifying the salient features of an appropriate precedent case, identifying legally significant similarities or differences between the precedent case and a fact pattern and explaining why those are legally significant) and rules (including the ability to connect legally significant facts in a fact pattern to the rule) to predict how a court would decide the issue. Students will also demonstrate the ability to identify and evaluate the public policies of a precedent case or rule, and be able to evaluate how public policy can impact the application of a rule to the legal issue.

Legal Research: Students will demonstrate the ability to locate relevant legal authority using a variety of book and electronic resources, and to properly cite to such legal authority.

Communication: Students will demonstrate the ability to communicate both orally and in writing in a manner appropriate to a particular task to effectively convey the author or speaker's ideas. This includes audience sensitivity in written and oral communication (the ability to adopt a tone, style and level of detail appropriate to the needs, knowledge and expertise of the audience); and written communication basic proficiency (the ability to use the conventions of grammar, spelling, punctuation, diction and usage appropriate to the task and sufficient to convey effectively the author's ideas).

Advocacy of Legal Argument: Students will demonstrate the ability, in both oral and written formats, to evaluate the legal, economic and social strengths and weaknesses of a

case and use case and statutory authority as well as public policy to persuade others. Making policy-based arguments includes the ability to identify and evaluate the public policies of a precedent case or rule and their implications, and be able to assert such appropriate arguments to support a particular application or distinction of a precedent case to a legal controversy or a particular resolution of the application of a rule to the legal controversy.

Client Sensitivity and Cultural Competency: Students will demonstrate an awareness of clients' needs and goals, including a sensitivity to clients' background and circumstances (including, but not limited to, socio-economic, gender, race, ethnicity, educational, disability and/or religious background(s)), the ability to make decisions that reflect an appropriate focus on those needs and goals, and awareness that cultural issues may affect the relevance of facts and application of the law.

Legal Ethics Students will demonstrate the ability to identify ethical issues in law practice contexts and make appropriate decisions to resolve such issues.

18. INSTITUTIONAL LEARNING OUTCOMES:

A. Analytical Reasoning: Analyze issues objectively, interpret and synthesize data and ideas, and develop feasible, flexible, and creative solutions to problems

B. Effective Communication: Identify audiences, assess information provided, interpret needs, and present relevant information using appropriate written, oral, and listening skills and media to meet the needs of the situation

C. Information Competency: Gather, evaluate, and ethically use information from a variety of relevant resources to make decisions and take action

D. Interpersonal Effectiveness: Develop individual and group interpersonal skills to improve and foster participation and interaction critical for achieving individual and group goals

E. Personal and Professional Integrity and Ethical Behavior: Demonstrate a multi dimensional awareness of individual and social responsibility to act ethically and with integrity in a diverse, global society

F. Professional Competence: Apply skills appropriate to program objectives and employ critical reasoning to contribute to one's field and profession

WEEKLY CLASS SCHEDULE

WEEK ONE - JANUARY 17, 2019

Required Reading Prior to Class

- Foonberg xi-xiv, 3-5, 8-16, 35-37, 39-42

Optional Reading Prior to Class

- Foonberg xv-xxxiii, 6-7, 17-34, 38

Required Activities to be Completed Prior to Class

- Complete the Clio Sign Up Assignment received from Professor Pedersen in the email that preceded the first class session. [NOTE: if you do not receive an email invitation from Professor Pedersen by the Sunday prior to the first class, please send him an email no later than midnight the next day requesting an invitation. The email should be sent to npedersen@pedersenlaw.com.]
- Locate, download and review the class syllabus from Clio and be prepared to ask any questions you may have about it on the first day of class. [NOTE: if you need any assistance locating and/or downloading documents from Clio, send an email to Professor Pedersen indicating as much and he will assist.]
- Locate, download and review each of the following Assignment Memos from Clio and be prepared to ask any questions you may have about any of these assignments on the first day of class:
 - Time Recordation and Reporting Assignment
 - Business Plan Assignment
 - Working for Yourself or Others Interactive Discussion Assignment
- Every student must prepare at least one question he or she wants answered by the panel of attorneys who will be coming to our first class. Any question about becoming an attorney, representing clients or opening or running a law firm is acceptable.
- Be prepared to introduce yourself to our attorney members of the panel before you ask your questions. Your introduction should include, at a minimum, your name, your year in law school and the practice area(s) that you are thinking of going into after passing the bar.

Work Product To Be Turned In At Beginning Of Class

- None this week

Class Agenda

- Getting to know each other
 - Professors introduce themselves to class
 - Students introduce themselves to professors and other class members
- Discuss class syllabus and administrative issues
- Discuss Clio software use
- Discuss time invoice assignment
- Discuss business plan assignment
- Panel Discussion: Attorneys who have been there and done that will respond to your questions about their decision to open their own firms

Notes/Assignments

- **Time Recordation and Reporting Assignment** should be downloaded from Clio and read. It would be prudent to calendar the deadlines set forth on the Assignment Memo.
- **Business Plan Assignment** should be downloaded from Clio and read. Students are advised to start working on this assignment right away and make work on this assignment a weekly task - not leaving work on it to the few days before the deadlines provided. It would be prudent to calendar the deadlines set forth on the Assignment Memo.
- **Working for Yourself or Others Interactive Discussion Assignment** should be downloaded from Clio. Assignment must be complete before next class (Week 2).

WEEK TWO – JANUARY 24, 2019

Required Reading Prior to Class

- Foonberg 47-53, 68-84

Optional Reading Prior to Class

- Cal Guide 33-38, 55-83

Required Activities to be Completed Prior to Class

- Review of Working for Yourself or Others document found on Clio
- Download from Clio and listen to the following recorded audio lecture:
 - Week 2 - Practice Area Selection
 - Week 2 - Housing the Practice

Work Product To Be Turned In At Beginning Of Class

- None

Class Agenda

- Law practice management software – a demonstration
- Interactive discussion of decision to work for yourself or others
- Live lecture - Forms of practice
- Assign groups for Technology Needs assignment

Notes/Assignments

- **Technology Needs Discussion Project Memo** should be downloaded from Clio and assignment completed before the beginning of next class session (Week 3).
- **Elevator Speech Assignment Memo** should be downloaded from Clio. Student should be prepared to give polished elevator speech at beginning of Week 4 class.

- **Fears and Passions Assignment Memo** should be downloaded from Clio and assignment completed before the beginning of next class session (Week 3).

WEEK THREE – JANUARY 31, 2019

Required Reading Prior to Class

- Foonberg 61-64, 99-107, 134-136

Optional Reading Prior to Class

- Foonberg 65-67, 89-98, 108-133
- Cal Guide 243-262

Required Activities to be Completed Prior to Class

- Group completion of technology needs assignment with at least one member of the group ready to actively interact in class discussion.
- Initial business plan portion in draft form per assignment memo and preparation of questions for workshop this class session
- Download from Clio and listen to the following recorded audio lectures:
 - Week 3 - Locating Your Practice
 - Week 3 - Furnishing and Supplying Your Practice

Work Product To Be Turned In At Beginning Of Class

- Passions and Fears Introspective Thoughts assignment

Class Agenda

- Interactive Exercise: Technology Needs of the Practice
- Business Plan Workshop – Getting Started

Notes/Assignments

- None

WEEK FOUR – FEBRUARY 7, 2019

Required Reading Prior to Class

- Foonberg 43-46, 313-314, 316-320, 582-583

Optional Reading Prior to Class

- Cal Guide 447-532

Required Activities to be Completed Prior to Class

- Download from Clio and listen to the following recorded audio lectures:
 - Week 4 - The Elevator Speech
 - Week 4 - Attacking the Impediments to Becoming a Rainmaker
- Prepare and practice your elevator speech to be presented in class

Work Product To Be Turned In At Beginning Of Class

- Invoice #1

Class Agenda

- Interactive Exercise: Elevator Speeches
- Live lecture: Business Development and Marketing – Becoming a Rainmaker - Part One

Notes/Assignments

- Students should come up with at least one insightful question to ask the panel next week about some form of business development or marketing that applies to the area of law the student believes they wish to enter.

WEEK FIVE – FEBRUARY 14, 2019

Required Reading Prior to Class

- Foonberg 159-160, 175, 205-219

Optional Reading Prior to Class

- Foonberg 137-143, 150-158, 176-182, 203-204

Required Activities to be Completed Prior to Class

Think through and be prepared to ask relevant and insightful questions of our panelists on the issue of business development and marketing of a practice.

Work Product To Be Turned In At Beginning Of Class

None

Class Agenda

- Panel Discussion: Business Development Issues
- Lecture: Business Development and Marketing, Part 2

Notes/Assignments

None

WEEK SIX – FEBRUARY 21, 2019

Required Reading Prior to Class

- Foonberg 147-149

Optional Reading Prior to Class

- Cal Guide 120-157

Required Activities to be Completed Prior to Class

- Business Plan draft ready for discussion with questions for workshop in class this week, per assignment memo

Work Product To Be Turned In At Beginning Of Class

None

Class Agenda

- Interactive Video Exercise: Identifying Problem Clients
- Business Development Plan Interactive Exercise
- Assign roles for Intake Practicum

Notes/Assignments

- **Intake Practicum Assignment Memos** should be downloaded from Clio. Students must be prepared to engage in the practicum upon the start of next class. Certain students selected to be the clients will be individually informed in class.

WEEK SEVEN – FEBRUARY 28, 2019

Required Reading Prior to Class

- Foonberg 234-247, 255-261, 288, 393-401
- Week 7 - Intake Procedures Article found in Clio documents
- Week 7 - Portion of Chapter on Intake from Aspatore Books found in Clio documents
- Week 7 - Statutes Codes and Rules Related to Fee Agreements (to be downloaded from Clio)

Optional Reading Prior to Class

- Foonberg 183-185, 286-287, 289-290, 315, 321-323

Required Activities to be Completed Prior to Class

- Download from Clio and listen to the following recorded audio lectures:
 - Week 7 - Intake Processes and Considerations

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- Prepare to interview prospective new client in accordance with Intake Practicum Assignment Memos

Work Product To Be Turned In At Beginning Of Class

None

Class Agenda

- Intake Practicum
- Engaging the Client lecture
- Assign groups for Engagement Letter assignment

Notes/Assignments

- **Engagement Agreement Assignment** distributed. One member of each group to submit draft of their Engagement Agreement no later than the beginning of class #9.
- **Intake Rejection Letter Assignment Memo** assigned, due at the beginning of class next week (Week 8).

MARCH 7, 2019 – SPRING BREAK – NO CLASS

WEEK EIGHT – MARCH 14, 2019

Required Reading Prior to Class

- Foonberg 161-164, 339-354, 402-405, 450-469, 505-507
- Time Management Reading Assignment should be downloaded from Clio as well as the Time Management Reading Materials, and all should be read.
- Week 8 - Going Digital Article - Reasons (to be downloaded from Clio)
- Week 8 - Going Digital Article - Nuts and Bolts (to be downloaded from Clio)
- Week 8 - 5 Ways GC's Spot a Lazy Lawyer (to be downloaded from Clio)

Optional Reading Prior to Class

- Foonberg 165-174, 335-338, 355-357, 448-449, 470-488, 508-514, 626-637

- Cal Guide 87-119, 310-368

Required Activities to be Completed Prior to Class

- Listen to CYLA ten minute mentor video on Paperless Office. Can be found at <https://www.youtube.com/watch?v=zjmZzcalCoM&index=6&list=PLApWyhdeKlpZEd1iIDCy7IIBivbevaacf>
- Download from Clio and listen to the following recorded audio lectures:
 - Week 8 – Time Management Lecture

Work Product To Be Turned In At Beginning Of Class

- Intake Rejection letter

Class Agenda

- Live lecture: Office practices, policies and procedures
- Catch up from prior material not completed

Notes/Assignments

None

WEEK NINE – MARCH 21, 2019

Required Reading Prior to Class

- Foonberg 269-279, 283-285, 298-299, 305-309, 326-332, 414-424, 440-447, 489-502, 576-581
- Week 9 - Spreadsheets.Budget.Revenue document (to be downloaded from Clio)
- Week 9 - Getting Paid article (to be downloaded from Clio)

Optional Reading Prior to Class

- Foonberg 280-281, 291-297, 310-312, 434-435, 503-504
- Cal Guide 161-173, 189-240

Required Activities to be Completed Prior to Class

None

Work Product To Be Turned In At Beginning Of Class

- Engagement Agreement (1 per firm)
- Business Plan interim draft (see assignment memo)

Class Agenda

- Live lecture: Financial Issues in running a law practice
- Live lecture: Budgeting
- Live lecture: Care and Feeding of Clients
- Trust Account and Banking Practicum - part one

Notes/Assignments

- **Banking and Trust Accounting Practicum homework assignment** to be completed by the beginning of class next week.
- **Explaining the Attorney-Client Contract Assignment Memo** should be downloaded and student should be prepared to engage in exercise for next week's class (Week 9).

WEEK TEN – MARCH 28, 2019

Required Reading Prior to Class

- Foonberg 161-163, 228-233, 425-433, 617-623

Optional Reading Prior to Class

- Foonberg 190-202, 248-251, 624-625
- Cal Guide 174-188

Required Activities to be Completed Prior to Class

- Banking and Trust Accounting Practicum homework such that student can interactively respond in class to discussion of answers.
- Be prepared to answer questions about your attorney-client contract per assignment memo
- Download from Clio and listen to the following recorded audio lectures:
 - Week 10 – Care and Feeding of Clients Lecture

Work Product To Be Turned In At Beginning Of Class

None

Class Agenda

- Trust Account and Banking Practicum - part two
- Interactive Exercise: Explaining the Attorney-Client Contract
- Live lecture: Claims Made Insurance Explained

Notes/Assignments

- **Termination of Engagement Letter Assignment Memo** should be downloaded and assignment completed before the beginning of class #11.

WEEK ELEVEN – APRIL 4, 2019

Required Reading Prior to Class

- Foonberg: 515-516
- Week 11 - Risk Management Article (to be downloaded from Clio)

Optional Reading Prior to Class

- Foonberg 406-408
- Cal Guide 369-446, 541-574

Required Activities to be Completed Prior to Class

- Download and listen to the following recorded lecture
 - Attorney as Employer – the basics

Work Product To Be Turned In At Beginning Of Class

Nothing

Class Agenda

- Live lecture: Surviving and Thriving in the Practice of Law
- Live lecture: The Attorney as Employer
- Live Lecture: Project Management

Notes/Assignments

- None this week

WEEK TWELVE – APRIL 11, 2019

Required Reading Prior to Class

- Susskind 1-61 [Note: It is critical that the student read and be ready to engage in class with the materials from the Susskind reading. Any student unprepared to do so when called upon will face a deduction from their final grade. You have been forewarned.]

Required Activities to be Completed Prior to Class

- Nothing this class

Work Product To Be Turned In At Beginning Of Class

Nothing

Class Agenda

- Live lecture: The Future Practice of Law

Notes/Assignments

None this class

WEEK THIRTEEN – APRIL 18, 2019

Required Reading Prior to Class

- Foonberg 641-647
- Week 13 - Digital Security Written Materials (downloaded from Clio)
- Week 13 - Law Firm Cybersecurity (downloaded from Clio)
- Week 13 - Law Firms Soft Underbelly for Hackers (downloaded from Clio)

Optional Reading Prior to Class

- Foonberg 523-570
- Cal Guide 268-290

Required Activities to be Completed Prior to Class

- Have Business Plan in draft form ready for discussion and questions in class during workshop, per assignment memo

Work Product To Be Turned In At Beginning Of Class

Nothing

Class Agenda

- Law office security issues
- Business Plan Workshop

Notes/Assignments

- **Panel Discussion Question Assignment** announced. Each student to formulate at least two questions for the panel discussion next week. In addition, students must prepare a 15-20 second “elevator speech” to introduce themselves to the panelists

WEEK FOURTEEN – APRIL 25, 2019

Required Reading Prior to Class

- Foonberg 600-603

Optional Reading Prior to Class

- Foonberg 593-599

Required Activities to be Completed Prior to Class

- Questions prepared for panel discussion

Work Product To Be Turned In At Beginning Of Class

Nothing

Class Agenda

- Panel Discussion
- Lecture: Maintaining Competence

Notes/Assignments

None

FINAL TURN IN DATE – MAY 3, 2019

Work Product To Be Turned:

- Final Business Plan
- Invoice #2