

**Western State College of Law  
Law Practice Management and Technology  
Fall 2017 Course Syllabus (version 1.0)  
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**SECTION:** 429-A  
**TIME:** Friday mornings 9:00 a.m. to 12:10 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).
- State Bar of California, The California Guide to Opening and Managing a Law Office (2008).
- Richard Susskind, Tomorrow's Lawyers: An Introduction to Your Future

**2. OPTIONAL TEXT**

State Bar of California, The California Guide to Opening and Managing a Law Office (2008). This book is listed in both the required and optional categories because you are not required to purchase the book, but required readings will be assigned from it. 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.

**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 of 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

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course, each student will be able to decide whether this is a road he or she wants to travel.

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.<sup>1</sup>

#### **6. CLASS ATTENDANCE.**

Attendance and participation are required for all classes.<sup>2</sup> 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

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<sup>1</sup> 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.

<sup>2</sup> 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.

your attendance; you will not receive a warning that you have reached the allowed number of absences.

**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.

**8. EXAMINATIONS AND GRADING.**

Your grade will be calculated as follows: Business Plan Grade: 50%; Coursework Grade: 50%. 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 each benchmark 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 (4 grades); Journals (4 grades); Technology Needs Follow-up research and reporting; Intake Application; Intake Rejection Letter; Engagement Letter; Conflict Acknowledgement and Waiver; Insurance Application, and Termination of Engagement Letter, as well as other assignments in the class designated to be graded work. 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 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. Journals 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 28, 2017 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 or Journal assignments. 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.1.2016.02.16.JaneDoe

- Journals: Journal.Week#.datesubmitted.studentname

For example: Journal.1.2016.02.01.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 hard paper at the beginning of class (or vice versa) will not satisfy the requirement of timely submission of an assignment.

All documents due on November 28, 2017 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, Professor Pedersen and Professor Dillinger do not maintain an office on campus. However, they will make themselves available to meet with students in a location to be determined. They will also make themselves available for meetings at Professor Pedersen's law office in Irvine, and Professor Dillinger's law office in San Juan Capistrano, dependent on their work schedules.

Professor Dillinger's Office  
Passion Law, PC  
27345 Ortega Hwy, Suite 200  
San Juan Capistrano, CA 92675

Professor Pedersen's Office  
Pedersen Law APLC  
17910 Skypark Circle, Suite 105  
Irvine, CA 92614

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. JUMPSTART GENIUS SOFTWARE.**

This semester our class is taking part in a pilot program for a new software. Each student will be provided with a login for the JumpStart Genius website and, for no separate fee, will have his or her own software login for the duration of the semester. The primary purpose for using JumpStart Genius software is so that important content can be covered efficiently by the software outside of classroom time. This allows for the professors to use classroom time to include practical exercises that give the students hands-on experience. Certain modules of the software will be assigned to the students by the professors. Students will be required to take the module's diagnostic assessment prior to completing each module, and will take a corresponding diagnostic assessment after completing the module. The software will provide each student with a Certificate of Completion after proper completion of each module. The student will provide such Certificate of Completion to the professors, along with the diagnostic assessments to show that the module has been properly completed.

To login, go to [www.jumpstartgenius.com](http://www.jumpstartgenius.com) and click on 'sign up'. Then pick the 'discounted' pricing and click 'sign up'. You will see the JSG Membership package for \$250. Please do not be concerned about the price and press 'Step 2'. Fill in your

information and continue. Enter the coupon code: WSCOL2015FL and press 'Apply'. You will be logged into your JumpStartGenius account.

**17. 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](mailto: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](mailto:aeasley@wsulaw.edu) or (714) 459-1168. Complaints will be handled in accordance with the College of Law's "Policy against Discrimination and Harassment."

**18. 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.

**19. ARGOSY UNIVERSITY INSTITUTIONAL LEARNING OUTCOMES:**

**A. Analytical Reasoning**

Analyze issues objectively, interpret and synthesize data and ideas, and develop feasible, flexible, and creative solutions to real world 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 technological and library 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 - AUGUST 18, 2017**

#### **Required Reading Prior to Class**

- Foonberg xxiii-xxviii, 3-42

#### **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 Friday prior to the first class, please send him an email no later than midnight that 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:
  - Self Assessment Survey
  - Time Recordation and Reporting Assignment
  - Journal 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 journal 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

- **Student Information Questionnaire and Self-Assessment** Survey should be downloaded from Clio. Please turn in the hard-paper original of this assignment at the beginning of class #2 and email a scanned version of the completed document to both professors before the beginning of class #2.
- **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.
- **Journaling Assignment** should be downloaded from Clio and read. This assignment requires weekly entries and submissions. 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 - AUGUST 25, 2017**

### Required Reading Prior to Class

- Foonberg 43-44, 47-48, 61-67, 523-532, 586-587
- Cal Guide 23-38

### Required Activities to be Completed Prior to Class

- Complete Working for Yourself or Others Interactive Discussion on-line work in accordance with the assignment memo and print certificate of completion from the JumpStart Genius site.
- Download from Clio and listen to the following recorded audio lecture:
  - Week 2 - Practice Area Selection (approx. 40 min)

### Work Product To Be Turned In At Beginning Of Class

- JumpStart Genius certificate of completion
- Journals #1
- Completed Student Information Questionnaire and Self-Assessment Survey

### Class Agenda

- Law practice management software – a demonstration
- Interactive discussion of decision to work for yourself or others
- Live lecture: Housing the Practice
- Live lecture: The Elevator Speech
- 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).
- **Prioritized Task List Assignment Memo** should be downloaded from Clio and assignment completed before the beginning of next class session (Week 3).
- **Elevator Speech assignment** should be downloaded from Clio. Student should be prepared to give polished elevator speech at beginning of Week 4 class.

**WEEK THREE - SEPTEMBER 1, 2017**

Required Reading Prior to Class

- Foonberg 45-46, 68-85, 94-130, 134-143, 489-507
- Cal Guide 53-83, 241-267, 291-328

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.
- 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

- Journals #2
- Prioritized task list in Clio software on your laptop to be presented to and approved by professors before beginning of class.

Class Agenda

- Live lecture - Forms of practice
- Live lecture: Business Development and Marketing – Becoming a Rainmaker - Part One

- Interactive Exercise: Technology Needs of the Practice

Notes/Assignments

- **Technology Needs Follow-up Project** assignment memo should be downloaded from Clio and completed as stated in the memo. Firms to turn in final project no later than the beginning of class #5.

**WEEK FOUR - SEPTEMBER 8, 2017**

Required Reading Prior to Class

- Foonberg 175-182, 203-219
- Cal Guide 447-532

Required Activities to be Completed Prior to Class

- Nothing this week

Work Product To Be Turned In At Beginning Of Class

- Business Plan draft #1
- Journals #3
- Invoice #1

Class Agenda

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

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 - SEPTEMBER 15, 2017**

Required Reading Prior to Class

- Foonberg 234-247, 393-405
- Intake Procedures Article found in Clio documents
- Portion of Chapter on Intake from Aspatore Books found in Clio documents

Required Activities to be Completed Prior to Class

- Prepare questions to ask Professor Dillinger during Business Plan counseling sessions to be held during class.

Work Product To Be Turned In At Beginning Of Class

- Journals #4
- Technology Needs Follow Up Assignment (one for each assigned group)

Class Agenda

- Panel Discussion: Business Development
- Presentation and discussion: The Business Development Lunch
- Interactive Video Exercise: Identifying Problem Clients
- Assign clients and groups for Intake Practicum Exercise

Notes/Assignments

- Business Plan Counseling Sessions going on during class
- **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.
- **Intake Application Assignment Memo** should be downloaded from Clio, due at the beginning of class #7.



**WEEK SIX - SEPTEMBER 22, 2017**

Required Reading Prior to Class

- Foonberg 220-227, 255-266
- Cal Guide 120-157
- Week 6 - Statutes Codes and Rules Related to Fee Agreements (to be downloaded from Clio)
- Week 6 - The Art of Drafting Conflict Waivers article (to be downloaded from Clio)

Required Activities to be Completed Prior to Class

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

Work Product To Be Turned In At Beginning Of Class

- Journals #5

Class Agenda

- Intake Practicum
- Post intake practicum live lecture
- Engaging the Client lecture
- Assign groups for Engagement Letter, Conflict Acknowledgement and Waiver, and Insurance Application assignments

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 #8.
- **Conflict Acknowledgment and Waiver Assignment** announced. One member of each group to submit draft of their Conflict Acknowledgment and Waiver due no later than the beginning of class #8.

[NOTE: there is one assignment memo for both of the above assignments]

- **Intake Rejection Letter Assignment Memo** assigned, due at the beginning of class next week (Week 7).

## **WEEK SEVEN - SEPTEMBER 29, 2017**

### Required Reading Prior to Class

- Foonberg 147-160, 448-464, 476-488
- Cal Guide 85-119, 329-368
- Week 7 - Spreadsheets.Budget.Revenue document (to be downloaded from Clio)
- Week 7 - Going Digital Article - Reasons (to be downloaded from Clio)
- Week 7 - Going Digital Article - Nuts and Bolts (to be downloaded from Clio)
- Week 7 - Getting Paid article (to be downloaded from Clio)

### 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>

### Work Product To Be Turned In At Beginning Of Class

- Journals #6
- Invoice #2
- Intake Application
- Intake Rejection letter

### Class Agenda

- Live lecture: Office practices, policies and procedures
- Live lecture: Financial Issues in running a law practice

- Live lecture: Budgeting

Notes/Assignments

- **Insurance Application Assignment** handed out in class. Group assignment due at the beginning of class #10.
- Goal is to have Business Plan draft #1 feedback handed back to students during this class

**WEEK EIGHT - OCTOBER 6, 2017**

Required Reading Prior to Class

- Foonberg 161-174, 190-202, 228-233, 248-251, 267-332, 465-475, 515-516, 533-575, 588-589, 617-625
- Cal Guide 533-540
- Time Management Reading Assignment should be downloaded from Clio as well as the Time Management Reading Materials, and all should be read.
- Week 8 - 5 Ways GCs Can Spot a Lazy Lawyer article
- Week 8 - Managing Client Expectations Article

Required Activities to be Completed Prior to Class

- Prepare questions to ask Professor Dillinger during Business Plan counseling sessions to be held during class.

Work Product To Be Turned In At Beginning Of Class

- Journals #7
- Time Management quiz
- Engagement Agreement (1 per firm)
- Conflict Acknowledgment and Waiver (1 per firm)

Class Agenda

- Live lecture: Care and Feeding of Clients
- Live lecture: Changes in the attorney-client relationship

Notes/Assignments

- Business Plan Counseling Sessions going on during class
- **Termination of Engagement Letter Assignment Memo** should be downloaded and assignment completed before the beginning of class #9.
- **Interactive Exercise - 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 NINE - OCTOBER 13, 2017**

Required Reading Prior to Class

- Foonberg 335-370, 508-514
- Week 9 - Risk Management Article (to be downloaded from Clio)

Required Activities to be Completed Prior to Class

- None this week

Work Product To Be Turned In At Beginning Of Class

- Business Plan draft #2
- Journals #8
- Termination of Engagement Letter

Class Agenda

- Interactive Exercise: Explaining the Attorney-Client Contract
- Live lecture: Risk Management for the Law Office Operator

- Presentation and discussion: Meeting A New Person at a Mixer

Notes/Assignments

- None this week

**WEEK TEN - OCTOBER 20, 2017**

Required Reading Prior to Class

- Foonberg 131-133, 436-439, 517-519
- Cal Guide 369-446

Required Activities to be Completed Prior to Class

- Nothing this week

Work Product To Be Turned In At Beginning Of Class

- Journals #9
- Insurance Application (one per firm)

Class Agenda

- Live lecture: The Attorney as Employer
- 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.

**WEEK ELEVEN - OCTOBER 27, 2017**

Required Reading Prior to Class

- Foonberg: 89-93, 414-435, 440-447, 576-581, 606-612
- Cal Guide 159-240

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.

Work Product To Be Turned In At Beginning Of Class

- Journals #10
- Invoice #3

Class Agenda

- Trust Account and Banking Practicum - part two
- Live lecture: Surviving and Thriving in the Practice of Law

Notes/Assignments

- None this week

**WEEK TWELVE - NOVEMBER 3, 2017**

Required Reading Prior to Class

- Foonberg 371-392, 406-408, 593-605, 613-616
- Law Office Security Articles (downloaded from Clio)

Required Activities to be Completed Prior to Class

- Nothing this class

Work Product To Be Turned In At Beginning Of Class

- Journals #11

Class Agenda

- Law office security issues

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- Time reserved to finish off content from prior weeks

Notes/Assignments

- Goal is to have Business Plan draft #2 feedback handed back to students during this class

**WEEK THIRTEEN - NOVEMBER 10, 2017**

Required Reading Prior to Class

- Foonberg 641-647
- Cal Guide 541-576
- 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 for this class

Work Product To Be Turned In At Beginning Of Class

- Journals #12

Class Agenda

- Essential Relationships for the small business law practitioner
- Live lecture: The Future Practice of Law

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 - NOVEMBER 17, 2017**

### Required Reading Prior to Class

- No assigned reading.

### Required Activities to be Completed Prior to Class

- Questions prepared for panel discussion

### Work Product To Be Turned In At Beginning Of Class

- Journals #13

### Class Agenda

- Panel Discussion
- Lecture: Maintaining Competence

### Notes/Assignments

- **Semester End Student Surveys.** Students should download from Clio the Student Information Questionnaire and Self Assessment Survey and complete it in light of the information learned and your personal development in the class to-date. To be turned in by email on November 28, 2017.

## **FINAL TURN IN DATE - NOVEMBER 28, 2017**

### Work Product To Be Turned:

- Final Business Plan
- Journals #14
- Invoice #4
- Student Information Questionnaire and Self-Assessment Survey