

WESTERN STATE COLLEGE OF LAW
SPRING 2026
LAW PRACTICE MANAGEMENT

SECTION: **429**
TIME: **WEDNESDAYS 2:00 pm - 4:50 pm**
PROFESSOR: **Heather E. Schley**
CONTACT: email: hschley@schleyfirm.com Cell: (714) 471-9707

SUGGESTED BUT NOT REQUIRED BOOKS

Jay G. Foonberg, **How to Start and Build a Law Practice** (5th ed. ABA Press 2004 or 6th ed. ABA Press Jan 7, 2020).

****Current Syllabus has pages from 5th ed. 6th ed pages will be added before first class on CLIO)**

Michael E. Gerber, **The E Myth Attorney** (Audio book free download on The Hoopla App.)

Emmanuel Olawale, **Starting and Growing a Law Practice Without Breaking the Bank**: Begin Your Practice with an Initial Capital of less than \$500

State Bar of California, **The California Guide to Opening and Managing a Law Office (2008)**. (Copies available at Library)

REQUIRED READING MATERIALS

Your required reading will come in the form of attachments in the CLIO software program under the Documents Tab and will be referenced in this Syllabus

COURSE OBJECTIVES

Law Practice Management is a three-unit, experiential course designed to bridge the gap between law school and the actual practice of law. Taught by a full-time practicing California attorney, this course provides students with practical knowledge and real-world skills that are rarely taught in traditional law school curricula. Success as an attorney requires far more than a thorough understanding of the law. Lawyers must also know how to effectively manage clients, operate a business, exercise sound professional judgment, comply with ethical obligations, and build a sustainable legal practice. This course is designed to prepare students for those responsibilities.

Although the course requires a significant investment of time, effort, and active participation, the knowledge and practical skills gained throughout the semester will provide a strong foundation for your transition from law student to practicing attorney.

The course explores the legal, ethical, financial, technological, and operational aspects of managing a modern law practice, with a particular emphasis on opening and operating a California law firm. Through lectures, guest speakers, practical exercises, simulations, and a semester-long law firm business plan, students will gain a comprehensive understanding of the challenges and opportunities involved in building and managing a successful legal practice.

Whether your goal is to become a solo practitioner, join a small or large law firm, work in government, serve as in-house counsel, or pursue another legal career, the principles taught in this course will help prepare you to enter the profession with greater confidence, competence, and professionalism.

COURSE GOALS

Upon successful completion of this course, students will be able to:

1. Understand the Business of Law by identifying the fundamental principles, operational challenges, and strategic considerations involved in establishing, managing, and growing a successful law practice.
2. Apply Ethical and Professional Responsibilities by recognizing and addressing the ethical obligations imposed by the California Rules of Professional Conduct, including duties to clients, the courts, opposing counsel, and the legal profession.
3. Demonstrate Financial Literacy by understanding the financial aspects of operating a law practice, including budgeting, accounting, billing, collections, financial reporting, and the proper management of Client Trust Accounts (IOLTA) in accordance with California law.
4. Develop Effective Business Development Strategies by creating ethical marketing, branding, networking, and client acquisition plans designed to build and sustain a successful legal practice.
5. Utilize Modern Legal Technology by developing a working knowledge of practice management software, legal research platforms, document automation, cybersecurity, artificial intelligence, and other technologies commonly used in today's legal profession.
6. Understand Client Expectations and the Evolving Legal Marketplace by recognizing changing client needs, advancements in legal technology, and

innovative approaches to delivering legal services while maintaining professionalism and adaptability.

7. Evaluate Practice Areas and Business Opportunities by assessing various areas of law based upon market demand, personal interests, financial viability, lifestyle considerations, and long-term career goals.
8. Develop Risk Management Skills by identifying common causes of attorney malpractice, implementing sound office procedures, and establishing systems designed to minimize professional liability and ethical violations.
9. Build a Practical Foundation for Law Practice by creating a comprehensive law firm business plan and drafting the essential documents, policies, and procedures necessary to effectively establish and manage a modern California law practice.
10. Exercise Sound Professional Judgment by developing the decision-making, communication, leadership, and interpersonal skills necessary to build strong client relationships, manage difficult situations, and uphold the highest standards of the legal profession.

COMPUTERS OR TABLETS

Please bring a computer or tablet that has internet capabilities and access to each class. If you do not have access to a computer or tablet please reach out to me and we can discuss a feasible alternative.

FORMAT REQUIREMENTS FOR WRITTEN ASSIGNMENTS

- Unless otherwise instructed, all written assignments must comply with the following formatting requirements:
- Typed using Times New Roman, 12-point font
- Double-spaced
- Printed on 8½" x 11" white paper (if a hard copy is required)
- One-inch margins on all sides (top, bottom, left, and right)
- Left-justified text
- Pages consecutively numbered in the bottom center of each page

- Stapled in the upper left-hand corner if submitted in hard-copy format
- Students using Microsoft Word should verify that all margins are set to one inch, as some versions of Microsoft Word may default to different margin settings.
- Unless otherwise directed, assignments should be submitted as a single-sided document.
- Attention to Detail
- The legal profession demands precision, organization, and attention to detail. Courts, clients, and supervising attorneys expect legal documents to comply with applicable formatting requirements, filing rules, and professional standards. Accordingly, students are expected to submit assignments that are carefully proofread and professionally presented.
- Assignments that fail to comply with these formatting requirements may receive a reduction in points. Repeated failure to follow formatting instructions may also be considered in the student's Professionalism grade.
- Students are expected to proofread all assignments for grammar, spelling, punctuation, organization, and overall professionalism prior to submission.

OFFICE HOURS

As an adjunct professor and full-time practicing attorney, I do not maintain regularly scheduled office hours on campus. However, I am committed to supporting your success in this course and am available to meet with students by appointment.

Meetings may be scheduled before or after class, by telephone, or via Zoom. If you would like to schedule a meeting, please email me at hschley@schleyfirm.com at least 24 hours in advance of your requested meeting time. I will make every reasonable effort to accommodate your schedule.

Students are encouraged to reach out with questions regarding course material, assignments, career planning, or any concerns related to the course. Early communication is encouraged, and I am always happy to assist when I can.

LATE ASSIGNMENTS

Meeting deadlines is a fundamental responsibility of every attorney. Courts, clients, and opposing counsel rely on lawyers to comply with deadlines, and failure to do so can have serious legal and professional consequences. This course is designed to

reinforce the importance of timely and professional work habits.

Unless otherwise approved by the professor, all assignments must be submitted by the stated deadline. Any assignment submitted after the deadline will be considered late and, absent extraordinary circumstances, will not be accepted.

Students who experience an unforeseen emergency—such as a serious illness, accident, or other comparable circumstance beyond their control—should notify the professor as soon as reasonably possible. In such circumstances, the professor may, in her sole discretion, grant an extension or make other appropriate accommodations.

Ordinary scheduling conflicts, work obligations, travel, traffic, computer or printer malfunctions, internet issues, or preparation for other classes generally do not constitute extraordinary circumstances.

Students are encouraged to plan ahead and allow sufficient time to complete and submit assignments before the deadline. Professional responsibility begins with effective time management.

PROFESSIONALISM

Maintaining professionalism in your appearance, conduct, communication, and work product reflects directly on your personal brand and professional reputation.. In addition to the assignments noted on the syllabus, 10% of your final grade is based on Professionalism. This grade will be the sole discretion of the professor at the end of the semester based on the student's overall professionalism demonstrated in all aspects of the course. Professionalism is distinct from compliance with the Honor Code. Professionalism includes, but is not limited to, the following:

- (1) Being on time for class
- (2) Being prepared for class and participate in class assignments & discussions.
- (3) Being Courteousness in class and in all communications and being polite and attentive to other students and guest speakers.

ATTENDANCE REQUIREMENT

You should attend every class. WSCL written policy for students whose class regularly meets once per week, upon your 3rd absence, you will fail this course and receive a grade of 0.0 (on the 4.0 scale). See Student Handbook, § 5.13. For students whose class meets once per week, if you are absent for an entire, or substantially all, of a three hour class period, you will have accumulated two official absences. If, however, you are absent for only half of a three hour class

period or a significant portion thereof, you will accumulate just one absence.

STUDENT SAMPLES

On occasion, we use anonymous samples of work from current or past students as examples. Please let your professor know in advance if you do not wish for your work to be considered as an example.

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.

CLIO LAW PRACTICE MANAGEMENT SOFTWARE PLATFORM.

Many aspects of this course will be administered through and require the student to sign into the "WSUFirm" 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 day 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.

EXAMINATIONS AND GRADING.

There will be **no midterm examination or final examination** in this course.

Instead, students will be evaluated through practical assignments designed to simulate the work performed by practicing attorneys. Throughout the semester, students will develop a comprehensive Law Firm Business Plan, draft real-world legal documents, participate in law office simulations, complete individual and collaborative assignments, and demonstrate the practical application of the concepts taught in class.

Final grades will be calculated as follows:

Graded Component	Percentage
Law Firm Business Plan (Capstone Project)	70%

Practical Coursework & Assignments	20%
Professionalism	10%

GRADING PHILOSOPHY

This course is designed to prepare students for the realities of legal practice. Accordingly, grades are based not only on a student's understanding of the material, but also on the quality of their work product, attention to detail, professionalism, critical thinking, judgment, organization, and ability to apply legal and business principles to practical situations.

Students are encouraged to view each assignment as an opportunity to improve the skills they will use throughout their legal careers rather than simply as an academic exercise.

LAW FIRM BUSINESS PLAN (70%)

The **Law Firm Business Plan** serves as the capstone project for this course. Rather than writing a traditional research paper, students will develop a practical business plan designed to serve as a blueprint for establishing and operating a successful California law practice.

The Business Plan will be completed incrementally through benchmark assignments submitted throughout the semester, allowing students to receive feedback and continually improve their work.

The Business Plan will be evaluated based upon factors including, but not limited to:

- Timely completion of benchmark assignments
- Organization and completeness
- Practical application of course concepts
- Legal and ethical analysis
- Selection and justification of the firm's business structure
- Compliance with applicable laws and regulations
- Financial planning and budgeting
- Risk management strategies
- Marketing and business development planning
- Integration of legal technology and artificial intelligence
- Professional presentation and writing quality
- Originality, critical thinking, and overall effort

Specific deadlines and page limitations will be provided for each benchmark assignment.

PRACTICAL COURSEWORK & ASSIGNMENTS (20%)

Students will complete a variety of practical assignments that mirror work commonly performed by practicing attorneys. These assignments are designed to reinforce the concepts discussed in class while developing practical lawyering skills.

Assignments may include, but are not limited to:

- Timekeeping and billing entries
- Client intake forms
- Engagement agreements
- Non-engagement letters
- Disengagement letters
- Conflict checks and conflict waivers
- Retainer and fee agreements
- Trust accounting exercises
- Legal research and reporting
- Office policies and procedures
- Marketing and branding projects
- Technology and AI assignments
- Other drafting and law practice management exercises

Certain assignments will be completed collaboratively by your assigned "Law Firm." Unless otherwise indicated, all members of the Firm will receive the same grade for the completed assignment. Students are expected to actively participate, communicate effectively, and contribute meaningfully to all group projects.

PROFESSIONALISM (10%)

Professionalism is an essential characteristic of every successful attorney and extends well beyond academic performance. Throughout your legal career, your reputation will be one of your most valuable professional assets.

Professionalism will be evaluated throughout the semester based upon your overall conduct, including but not limited to:

- Attendance and punctuality
- Preparation for class
- Meaningful participation in discussions and exercises
- Professional communication with the professor, classmates, and guest speakers
- Courtesy, civility, and respect for others

- Collaboration during Firm assignments
- Reliability, accountability, and initiative
- Compliance with assignment instructions and deadlines
- Professional demeanor consistent with the standards of the legal profession

Professionalism is evaluated independently from the College's Honor Code and reflects the expectations students will encounter in the practice of law.

GRADING SCALE

All graded assignments, including the Law Firm Business Plan and Practical Coursework, will be evaluated using Western State College of Law's **4.0 grading scale**, including one-tenth point increments (e.g., 4.0, 3.9, 3.8, etc.).

The average of all graded coursework assignments will constitute the Coursework grade. Final grades will then be calculated according to the weighting described above.

LAW SCHOOL GRADING POLICY

Western State College of Law maintains academic policies governing the assignment of grades. As a faculty member, the professor is required to comply with all applicable College grading policies, academic regulations, and accreditation standards, including any required grade distribution or median established by the College.

Accordingly, final grades are assigned in accordance with those institutional requirements. While every effort will be made to provide timely feedback and evaluate student work fairly and consistently, final course grades must comply with the grading policies adopted by Western State College of Law.

Students are encouraged to focus on developing the practical knowledge, professional judgment, and lawyering skills taught throughout this course rather than comparing grades with classmates. The primary objective of this course is to prepare students for the successful and ethical practice of law.

HONOR CODE:

Because this course requires writing, it is important that your work product meets the outlined HONOR CODE.

Unless otherwise designated by your instructor as a “Firm” assignment, all work in this course must be your own. Any suspicion of plagiarism or use of artificial

intelligence will result in a “0” for the course and possible referral to the Honor Code Committee.

Plagiarism includes paraphrasing or quoting from any source without properly acknowledging the source or without including quotation marks where such marks are necessary.

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. 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 Halim Dhanidina at hdhanidia@wsul.edu or (714) 459-1168. Complaints will be handled in accordance with the College of Law’s “Policy against Discrimination and Harassment.”

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:

(1) 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.

(2) 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.

(3) 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.

(4) 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.

(5) 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).

(6) 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.

(7) 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.

(8) Legal Ethics

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

WEEKLY CLASS SCHEDULE

WEEK 1: Aug. 19, 2026: Introduction to Law Practice Management

Required Activities to be Completed After Class

- Self-Assessment Survey
- Student Information Questionnaire
- CLIO Registration
- Business Plan Assignment Review
- Timekeeping Assignment Review

Class Agenda

- Professor & Student Introductions

- Course Overview
- Syllabus Review
- Course Goals & Expectations
- The Business of Law
- Why Lawyers Fail
- What Law School Doesn't Teach
- Introduction to CLIO
- Introduction to Semester Business Plan

Work Product

- Complete Student Questionnaire
- Register for CLIO
- Review Business Plan Assignment
- Begin Timekeeping Assignment

WEEK 2: Aug. 26, 2026: Choosing a Practice Area & Business Structure

Required Reading Prior to Class

- CA Bar Title 3 (Law Corporations)
- CA Bar Title 3 (LLPs)
- Business Formation and Tax Considerations for Solos and Small Firms
- Private Law Practice

Class Agenda

- Choosing Your Practice Area
- Solo Practice vs. Partnership
- Law Corporation vs. LLP vs. Sole Proprietorship
- California Secretary of State Requirements
- State Bar Registration
- Advantages & Disadvantages of Each Entity
- Guest Speaker

Work Product

Select the business entity for your Law Firm and explain why it best fits your firm's goals.

WEEK 3: Sept. 2, 2026: Opening Your California Law Firm

Required Reading Prior to Class

- California Guide to Opening and Managing a Law Office
- Opening a Law Office Checklist (CLIO)

Class Agenda

- EIN & Tax Registration
- Business Licenses
- Bank Accounts
- Malpractice Insurance
- Office Space
- Virtual vs. Physical Offices
- Office Equipment
- Practice Management Software
- Building Your Startup Checklist

Work Product

Create your firm's Startup Checklist and Office Opening Plan.

WEEK 4: Sept. 9, 2026: Financial Management & Law Firm Budgeting

Financial Management & Law Firm Budgeting

CLASS AGENDA

- Understand key financial principles for law firms
- Build a basic operational budget
- Distinguish between fixed and variable costs
- Forecast revenue and manage payroll & taxes
- Analyze profitability and plan strategic investments
- The importance of financial literacy in legal practice
- Common law firm financial mistakes
- Balance Sheet: Assets, Liabilities, Equity
- Income Statement (P&L): Revenues vs. Expenses
- Cash Flow Statement: Inflows vs. Outflows
- What is a budget and why it matters

- Key components: Revenue, Expenses, Profit
- Planning cycle: Monthly, Quarterly, Annual
- Payroll & Taxes
- Employee vs. Contractor
- Payroll tools (e.g., Gusto, ADP)
- Withholdings, payroll taxes, and estimated tax payments
- Common deductions: home office, CLE, malpractice insurance
- Profitability = Revenue – Costs
- Strategic investment areas:
- Practice management software
- Marketing
- Staff/paralegal support
- Track ROI on each investment

Work Product

Read Trust Handbook & Girardi Scandal Article

Draft Budget Template and Fee Structure

WEEK 5: Sept. 16, 2026: Client Intake, Consultations & Engagement

Required Reading Prior to Class

- California Rules of Professional Conduct
- Client Intake Materials (CLIO)

Class Agenda

- Getting Your First Client
- Initial Consultation
- Conflict Checks
- Client Screening

- Engagement vs. Non-Engagement Letters
- Fee Agreements
- Managing Client Expectations
- Professional Communication

Work Product

Draft:

- Client Intake Form
- Conflict Check Form
- Engagement Letter

WEEK 6: Sept. 23, 2026: Client Trust Accounts, Billing & Collections

Required Reading Prior to Class

- California State Bar Handbook on Client Trust Accounts (CLIO)
- California Launches Client Trust Program After Girardi Scandal (CLIO)
- Ethics Spotlight: Client Trust Accounts and Bank Stability Concerns (CLIO)

CLASS AGENDA

- Purpose of Client Trust Accounts (IOLTA)
- California Rules Governing Client Funds
- Proper Deposits and Withdrawals
- Common Trust Account Mistakes
- Flat Fees vs. Hourly Billing vs. Contingency Fees
- Client Costs and Advanced Costs
- Timekeeping and Billing Best Practices
- Collections and Accounts Receivable
- Ethical Responsibilities in Handling Client Money
- Avoiding Bar Complaints Related to Billing

WORK PRODUCT

- Set Up a Mock Client Trust Account.
- Complete Trust Account Exercise.
- Draft a Sample Billing Statement.
- Log Weekly Hours in CLIO.
- Continue Business Plan Assignment.

WEEK 7: Sept. 30, 2026: Becoming a Rainmaker: Getting Clients

Required Reading Prior to Class

- "Best Ways to Get Clients" – California Business Journal (CLIO)
- Marketing Your Law Practice (CLIO)

CLASS AGENDA

- Building Your Professional Brand
- Defining Your Target Client
- Referral Networks
- Building Relationships with Other Attorneys
- Community Involvement and Networking
- Developing an Effective Elevator Pitch
- Reputation Management
- Creating a Marketing Plan
- Ethical Considerations in Business Development

WORK PRODUCT

- Develop a Marketing Plan for Your Law Firm.
- Prepare and Present Your Elevator Pitch.
- Log Weekly Hours in CLIO.
- Continue Business Plan Assignment.

WEEK 8: Oct. 7, 2026: Managing Your Time, Office & Client Communication

Required Reading Prior to Class

- "7 Lawyer Time Management Issues and How to Avoid Them" (CLIO)
- Organization for Lawyers: How to Get Organized and Get More Done (CLIO)
- California Rules of Professional Conduct Rule 1.4 – Communication (CLIO)

CLASS AGENDA

- Time Management Strategies for Attorneys
- Calendaring and Deadline Management
- Prioritizing Tasks
- Managing Emails and Telephone Calls
- Delegation and Working with Staff
- Office Policies and Procedures
- Communicating with Difficult Clients
- Managing Client Expectations Throughout Representation
- Technology Tools That Improve Efficiency

WORK PRODUCT

- Create Your Law Firm Office Procedures Checklist.
- Complete Client Communication Exercise.
- Log Weekly Hours in CLIO.
- Continue Business Plan Assignment.

WEEK 9: Oct. 14, 2026: Technology, Artificial Intelligence & Modern Law Practice

Required Reading Prior to Class

- Legal Technology Tools (CLIO)
- Artificial Intelligence in Law Practice (CLIO)
- Cybersecurity Best Practices for Law Firms (CLIO)

CLASS AGENDA

- Practice Management Software
- Document Management Systems
- Electronic Filing
- Electronic Discovery
- Artificial Intelligence in Legal Practice
- Ethical Issues Related to AI
- Cybersecurity and Client Confidentiality
- Cloud-Based Practice Management
- Automating Law Office Workflows
- Future Trends in the Legal Profession
- Guest Speaker

WORK PRODUCT

- Complete Lexis+ AI Assignment.
- Develop an AI and Technology Policy for Your Law Firm.
- Log Weekly Hours in CLIO.
- Continue Business Plan Assignment.

WEEK 10: Oct. 21, 2026: Marketing, Advertising & Social Media

Required Reading Prior to Class

- California Rules of Professional Conduct Rules 7.1–7.5 (CLIO)
- State Bar of California Attorney Advertising Guidelines (CLIO)
- Law Firm Marketing and Branding (CLIO)
- Social Media Ethics for Attorneys (CLIO)

CLASS AGENDA

- Developing Your Law Firm Brand
- Building a Professional Website
- Search Engine Optimization (SEO)
- Google Business Profile
- Online Reviews and Reputation Management

- California Rules Governing Attorney Advertising
- Solicitation Rules and Ethical Limitations
- Social Media Best Practices
- LinkedIn, Instagram and Facebook for Lawyers
- Creating a Marketing Plan
- Measuring Return on Marketing Investment (ROI)

WORK PRODUCT (Assignments)

- Develop a Marketing Plan for your Law Firm.
- Create a one-page website homepage mock-up.
- Draft one ethical social media post promoting your law firm.
- Log weekly hours in CLIO.
- Continue working on your Business Plan Assignment.

WEEK 11: Oct. 28, 2026 Client Service, Closing the Client & Building Referrals

Required Reading Prior to Class

- California Rules of Professional Conduct Rule 1.4 (Communication) (CLIO)
- Sample Closing Letter (CLIO)
- Client Satisfaction and Referral Strategies (CLIO)

CLASS AGENDA

- Providing Exceptional Client Service
- Communicating Throughout Representation
- Managing Difficult Clients
- Delivering Bad News Professionally
- Closing a Client File
- Returning Client Property
- Record Retention Requirements
- Requesting Client Reviews
- Building a Referral-Based Practice
- Turning Satisfied Clients into Future Business

WORK PRODUCT (Assignments)

- Draft a Closing Letter.
- Develop a Client Satisfaction Survey.
- Create a File Closing Checklist.
- Log weekly hours in CLIO.
- Continue working on your Business Plan Assignment.

WEEK 12: Nov. 4, 2026:

Reading required before class

1. California Rules of Professional Conduct – Chapter 5: Law Firms and Associations (Rules 5.1–5.3) (Required)
 - Responsibilities of Managing Lawyers
 - Responsibilities of Supervising Lawyers
 - Responsibilities Regarding Non-lawyer Assistants
2. BASF Solo & Small Firm Toolkit – Employment & Human Resources
3. Clio – The Ultimate Law Firm Employee Onboarding Checklist

CLASS AGENDA

- Building an Efficient Law Office
- Creating Office Policies and Procedures
- Standard Operating Procedures (SOPs)
- Employee Handbook: Pros and Cons
- Hiring Your First Employee
- Training and Onboarding New Employees
- Supervising Employees
- Ethical Responsibilities of Supervising Attorneys
- Supervising Nonlawyer Staff (Rule 5.3)
- Performance Management
- Progressive Discipline
- Terminating Employees Professionally
- Protecting Client Confidentiality During Employee Transitions
- Leadership and Office Culture
- Managing Growth as Your Practice Expands

NOVEMBER 11, 2026: NO CLASS

Week 13 – Risk Management, Professional Responsibility & Attorney Wellness

Reading required before class

- California Rules of Professional Conduct (selected rules)
- California State Bar Client Trust Account resources (selected sections)

Class Agenda

- Preventing Legal Malpractice
- Conflict Checks
- Calendaring & Deadline Management
- File Management & Document Retention
- Cybersecurity & Data Protection
- Malpractice Insurance

- Attorney Burnout
- Mental Health & Wellness
- Ethical Decision-Making
- Creating a Sustainable Legal Career
- Succession Planning
- Disaster Recovery & Business Continuity Planning

Assignment

Develop a **Law Firm Risk Management Plan** identifying policies and procedures to reduce malpractice exposure.

WEEK 14: Nov. 25, 2026: Business Plan Presentations & Course Wrap-Up

Class Agenda

- Peer Questions & Feedback
- Lessons Learned
- Transitioning from Law Student to Lawyer
- Final Thoughts & Course Wrap-Up