

WESTERN STATE COLLEGE OF LAW
SPRING 2026
LAW PRACTICE MANAGEMENT

SECTION: 429 A Room 113
TIME: WEDNESDAYS 3:00 pm - 5:50 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 one-semester, three-unit course. It is a class taught by full-time practicing lawyer 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. 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.

COURSE GOALS

- (1) To gain an understanding of the fundamental principles and challenges of the Business of Law and Law practice management.
- (2) To understand the Ethical and Professional Responsibilities associated with managing and running a law practice.
- (3) To understand the financial aspects of Law Practice Management including; budgeting, accounting, billing and how to properly maintain a "Client Trust Account".
- (4) To gain a working knowledge of law practice development and marketing including; client acquisition, branding, networking and effective marketing techniques.
- (5) To acquire knowledge of Legal Management programs and other available technology.
- (6) To gain an understanding of the legal market and client expectations through Law Practice innovation and adaptability.
- (7) To be able to select an area(s) of law that will be profitable and worth your time and effort while avoiding clients and matters that will drain your resources and your emotions.

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 ASSIGNMENTS

- (1) Assignments must be typewritten in black ink, double-spaced, on white, 8 1/2 x 11 inch paper.

- (2) Text must be in “Times New Roman,” 12-point font.
- (3) You must use one-inch margins for the top, bottom, left, and right margins.
(Note that, if using Microsoft Word, you must set the margins to one-inch each, as the right and left margins are preset at 1.25 inches.)
- (4) Each page should be numbered, in the center, at the bottom of the page, using Times New Roman font. (Note that even if the text of your document is in Times New Roman, you must affirmatively change the font of your pagination.)
- (5) Text must be left-justified.
- (6) You must print on only one side of the paper.
- (7) All papers must be bound in the upper-left hand corner with a staple.

Points will be deducted for assignments that do not conform to the Format Requirements. In addition, for consistent failure to conform to Format Requirements, points will be deducted at the end of the semester from the Professionalism grade for the course.

OFFICE HOURS

As an adjunct professor and full-time practicing attorney, I do not maintain an office on campus. However, I am happy to arrange to meet you before or after class and students can arrange meetings by phone or zoom. To schedule a meeting or call, please send an email to hschley@wsulaw.edu or hschley@schleyfirm.com at least 24 hours prior to the requested meeting or call.

LATE ASSIGNMENTS

As a professional, you are responsible for handing in all assignments on time. Courts will not accept late papers. A late paper is one handed in any time after it is due. Late assignments will not be accepted.

** If you have an unforeseeable emergency involving a serious illness, an accident, or some other comparable emergency, contact your instructor as soon as possible. Traffic, printing problems, or preparation for another class do not count as an unforeseeable emergency. Your instructor, at her sole discretion, may extend your due date to provide you with enough time to deal with your emergency.

PROFESSIONALISM

You are the product you are selling. Maintaining a professional appearance in all aspects of your life will be reflect on your “Brand”. 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 twice per week, upon your fifth 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 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.

EXAMINATIONS AND GRADING.

Your grade will be calculated as follows: Business Plan Grade: 50%; Coursework Grade: 40% and 10% Professionalism. There will be no mid-term or final examination in this course.

Business plan grade (70% of overall grade) will be graded on the following criteria: Timely submission of each benchmark work, completeness and organization of business plan, contractual analysis, legal & regulatory compliance, risk management, ethical considerations, clarity of plan, effort put into building of plan (page limit will be given when assigned)

Coursework grade (20% of total grade) will be earned in the following activities: Time Invoices, Follow-up research and reporting; retainer agreement; 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 your "Firm" assigned in class. 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.

Professionalism (10% of total grade)

You are the product you are selling. Maintaining a professional appearance in all aspects of your life will be reflect on your "Brand". In addition to the assignments noted on the syllabus. 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: Being on time for class, being prepared for class and participating in class assignments & discussions.

Being Courteousness in class and in all communications and being polite and attentive to other students and guest speakers.

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.

HONOR CODE:

Because this is 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 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 Marisa Cianciarulo at mcianciarulo@wsulaw.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: JANUARY 14, 2026 Introduction to Law Practice Management

Required Activities to be Completed after to Class

- Self Assessment Survey
- Complete Student Information Sheet
- Be Prepared to introduce yourself in front of the class. 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. You can add any internships you have done or other exposures to working in a law office or firm. Feel free to add anything else interesting about yourself you would like to share with the class.
- Student Information Questionnaire and Self-Assessment Survey should be downloaded from Clio after or during class. Please turn in the hard-paper original of this assignment at the beginning of class #2 or email a scanned version of the completed document to hschley@schleyfirm.com before the beginning of class #2.

CLASS AGENDA

- Introductions (Professor and Students - background information about yourself, anything interesting you want to share and description of career goals)
- Course Overview
- Discuss Syllabus and Administrative Issues (exam numbers)
- Discuss Goals of Class
- Discuss the “Business of Law” Class objectives and Goals
- Law practice management software CLIO registration (bring computer or tablet)

- CLIO and how it will be used throughout the course of this class
- Discuss Time invoice assignment
- Discuss Business Plan assignment
- Hoopla app. Michael E. Gerber, **The E Myth Attorney**

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.
- Input Calendar of due dates of assignments on CLIO
- The 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 . If you complete Business Plan assignments throughout the course your Final Business Plan will be much more well thought out and a large portion of your final will be already complete - 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.

WEEK 2 JANUARY 21, 2026 : Creating a Legal Entity & Choosing a Business Structure

Required Reading Prior to Class

CA Bar Title 3 Law Corps. (On CLIO)

CA Bar Title 3 LLP (On CLIO)

Private Law Practice (and What to Know About Starting Your Own) by Mike Robinson (on CLIO)

Business Formation and Tax Considerations for Solos and Small Firms (CLIO)

CLASS AGENDA

- Should I start my own Practice vs. Partners

- Law Corp. vs. LLP vs. Sole Practitioner (GUEST SPEAKER)
- Advantages/disadvantages of each structure
- Filing Requirements
- California Secretary of State
- State Bar of California
- Franchise Tax Board
- Business licenses and local permits
- Malpractice insurance considerations
- Tax identification number (EIN) and bank accounts
- Budget

Work Product : Assignment: Select a Business Entity for Your Law Firm.

Discuss each entity structure available to California lawyers. Analyze the advantages and disadvantages of each structure in the context of starting and operating a law firm. Select the entity that you believe best aligns with your firm's goals, size, risk tolerance, tax considerations and practice areas.

Due: At the beginning of the next class session.

Format: Typed,

WEEK 3 JANUARY 28 , 2026 Regulatory Compliance & Ethical Readiness

Required Reading Prior to Class

- CA Bar Title 3 Law Corps. (CLIO)
- CA Bar Title 3 LLP (CLIO)
- "Private Law Practice" by Mike Robinson (CLIO)
- "Business Formation and Tax Considerations for Solos and Small Firms" (CLIO)

CLASS AGENDA

- Starting a Practice vs. Partners
- Law Corps vs. LLP vs. Sole Practitioner
- Filing Requirements (SOS, State Bar, FTB)

- Business Licenses, Permits, Insurance, EIN, Bank Accts
- Budgeting Overview
- Guest Speaker

WORK PRODUCT (Assignments)

Log weekly hours in CLIO

Start Organizing Business Plan

Read Ethics Spotlight: Client Trust Accounts and Bank Stability Concerns
(Clio)

WEEK 4 FEBRUARY 4, 2026 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 FEBRUARY 11, 2026 Client Trust Accounts and Fee & Retainer

Required Reading Prior to Class

California State Bar Handbook on Client Trust Accounts in CLIO (150 Pages)

California Launches Client Trust Program After Girardi Scandal

Ethics Spotlight: Client Trust Accounts and Bank Stability Concerns

CLASS AGENDA

- Client Trust accounts
- Depositing unpaid fees
- Representation and fee agreements
- Fee Splitting
- Referral Fees
- Disclosure to 3rd parties
- Ethical Issues

- Client Costs
- Billable hours
- Flat fee
- Contingency fees (rules for minors)
- Importance of doing things correctly
 - Financial accounting and documentation
 - Pro Bono (importance of giving back, Inevitable representation of family and close friends)
- Professional Advice
- Firm Assignment (in Class) Firms will go over Client Trust Accounts (IOLTA) and retainer agreements. Firms to complete setting up "Mock" Trust Account and draft retainer agreement to be turned in on CLIO.

WORK PRODUCT

Log Hours in CLIO

Draft retainer agreement (turn in next class)

Set up Mock Firm Trust Account (turn in next class)

Read California State Bar Handbook on Client Trust Accounts (150 pages)

Read: Organization for Lawyers: How to Get Organized and Get More Done Written by Karla J. Eckardt

WEEK 6: FEBRUARY 18, 2026 Client Engagement & Billing Policies

Required Reading Prior to Class

- CA State Bar Handbook on Trust Accounts (150 pages)
- "Client Trust Program After Girardi Scandal" (CLIO)
- "Ethics Spotlight: Trust Accounts" (CLIO)

CLASS AGENDA

- Trust Accounts, Fee Agreements, Fee Splitting
- Billing Models: Hourly, Flat, Contingency
- Client Costs, Documentation
- Financial Ethics & Pro Bono

Work Product

- Log Hours in CLIO
- Draft Retainer Agreement
- Set up Mock Trust Account
- Read: "Organization for Lawyers" by Eckardt

WEEK 7: FEBRUARY 25, 2026 Becoming a Rainmaker: Getting Clients

Required Reading Prior to Class

- "Best Ways to Get Clients" – CA Business Journal (CLIO)

CLASS AGENDA

- Client Acquisition Strategies
- Branding, Advertising, Referrals
- Networking & Public Presence
- Giving Elevator Speeches

Work Product

- Log Hours in CLIO
- Prepare Interview Questions

WEEK 8: MARCH 4, 2026 "CLOSING TIME".

Guest Lecturer

Closing the Deal: Client Closures

- Sales Principles, Rapport, Objection Handling
- Roleplay: Thank Yous & Closing Speech
- Client Reviews, Follow-up Systems

WEEK 9 MARCH 11, 2026 Wellness, Recovery & Risk

Management Required Reading Prior to Class

- Substance Abuse in the Legal Profession (week 8 Clio)
- The Other Bar(week 8 Clio)

CLASS AGENDA

- Mental Health, Burnout, LAP, The Other Bar
- Guest Speaker: Michael Mack (Recovery Story)
- Impairment Ethics & Self-Awareness
- Communication, Client Retention, Conflicts, Saying No

Work Product

- Log Hours in CLIO
- Conflict of Interest Waiver

MARCH 11, 2026 = SPRING BREAK

WEEK 10 MARCH 18, 2026 Managing your valuable Time

Required Reading Prior to Class

Read Article: 7 Lawyer Time Management Issues and How to Avoid Them

Read CLIO Article Organization for Lawyers: How to Get Organized and Get More Done

Read Article: Telephone call management for today's lawyer

Review California State Bar rule 1.4 "Communication" posted in CLIO

CLASS AGENDA

- Importance of time management on Law Practice
- Challenges faced by attorneys with Time Management (Court)
- Time Blocking
- To Do list

- Digital Calendars, scheduling software
- Delegation and outsourcing
- Managing emails and communication (why attorneys don't want to return calls)
- Phone call exercise on phone call management strategies
- Walking Clients off the Ledge
- Firm Activity on Prioritization and categorization of tasks.
- Firm Phone Role Play Activity
- Business Plan meeting sign up with Professor Schley

Work Product

Log Hours in CLIO

Business Plan Assignment

WEEK 11: MARCH 25, 2026 Advertising and Solicitation

Required Reading prior to class

ETHICAL ATTORNEY ADVERTISING: Rules for 3rd party websites -CLIO

Lawyer Advertising Rules You Need to Know; by Sharon Miki -CLIO

Rule 1-400 Advertising and Solicitation Calif. State Bar - CLIO

CLASS AGENDA

- Understanding Solicitation
- Definition and legal significance of solicitation in the legal context
- Differentiating solicitation from advertising and marketing
- Case studies and examples illustrating solicitation in legal practice
- Ethical Rules and Regulations
- Analysis of key cases that have shaped regulations in this area

- Exploring the grey areas in solicitation and advertising
- challenges and dilemmas faced by legal professionals
- hypothetical scenarios involving complex solicitation issues
- Effective and Ethical Advertising
- Strategies for ethical advertising in the legal profession
- Best practices for marketing legal services while adhering to ethical guidelines
- Review of successful ethical advertising campaigns

WORK PRODUCT

Log in hours in CLIO

WEEK 12: APRIL 1, 2026 Social Media and Law Practice Required reading prior to class

CLASS AGENDA

- The influence and impact of social media on the legal profession
- State Bar regulations
- Strategies for establishing and maintaining a professional social media presence
- Creating social media policies for law offices
- Best practices for content creation, posting, and engagement
- Two sides to Social Media
- How it can HELP promote your firm
- Legal success stories
- Pitfalls and potential harm it can cause
- Addressing negative comments, feedback or controversies