

NCDD/NACDL LAS VEGAS 2018
TIPS FOR GROWING A SUCCESSFUL LAW
PRACTICE



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Bio Virginia L. Landry



Virginia Landry is well known in Orange County for effectively representing persons accused of DUI cases relating to alcohol and drugs, as well as the DMV's Administrative Per Se actions for license suspensions. Located in Laguna Hills, California, the firm has successfully represented thousands of DUI clients during her twenty nine years of private practice. Virginia Landry is Board Certified in DUI Defense Law by the ABA and the National College for DUI Defense, is a Regent, Sustaining Member and Chairperson for the Diversity and Listserv Committees. Virginia serves on the National Association of Criminal Defense Lawyers Association DUI Committee. She currently serves on the Board of Directors for the California DUI Lawyers Association as its Secretary. Virginia Landry is a current member of the Orange County Bar Association, previously serving on the Board of Directors and on two committees. Virginia Landry is qualified as an Instructor for Standardized Field Sobriety Testing, and owns two portable breath testing machines. Speaking engagements include the National College for DUI Defense, Mastering Scientific Evidence, California State Bar Association's annual meeting, the California DUI Lawyers Association, California Attorneys for Criminal Justice, the California Public Defenders Association, the West, Newport Harbor and South Harbor Orange County Bar Associations and the Bridging the Gap program for new attorneys. Ms. Landry has been a guest lecturer at Chapman University of Law, Western State University and Trinity College of Law. Virginia Landry has been featured in the Orange County Register, the OC Bulletin, the Irvine World News and appeared on news channels 4 and 13 and radio talk show "Ridin' Dirty".

Professional Affiliations

Virginia L. Landry



National College for DUI Defense

National Association of Criminal Defense Lawyers

California Attorneys for Criminal Justice

California DUI Lawyers Association

California Public Defenders Association

American Bar Association

Orange County Bar Association

Newport Harbor Bar Association

West Orange County Bar Association

South Orange County Bar Association

Northern Arizona University Alumni Association

Western State College of Law Alumni Association

BASEBALL WITH THE GIRLS



MOVIECLIPS.COM

29 YEARS AND COUNTING

- 5 YEAR RULE
- TAKE CARE OF YOUR CLIENTS
- TAKE CARE OF YOUR STAFF
- TAKE CARE OF YOURSELF
- WORK HARD/PLAY HARD

5 YEAR RULE

IF YOU TAKE CARE OF YOUR CLIENTS
FOR FIVE FULL YEARS...

THEY WILL TAKE CARE OF YOU FOR
LIFE!

PREP WORK

- SET UP SYSTEMS
 - Develop Your Own
 - Purchase Them
 - Demo and Try
 - Continually Modify
 - Permission Granted to Steal

Systems to Serve You

- Cloud and Storage Management
- Backups/Offsite/IT
- Security and Cyber Controls
- Password Protections
- Encryption
- Mobile Devices

OFFICE AUTOMATION

- Virtual Office
- Ecommerce
- Chat/Answering Service/Live Staff
- InfusionSoft
- My Case
- Vendors Here

TRACKING

- Conflicts
- Repeat Clients
- Referral Sources
- Arresting Officers
- Breath BAC
- Blood BAC



REFERRALS

- Advertising
- Marketing
- Speaking Engagements
- Books
- eBooks
- Seminars
- Clients
- Business Development

5 Areas of Movement

- Media
- Case Management
- Analytics
- Marketing
- Outsourcing

TECHNOLOGY

- Erin Gerstenzang

Using Technology to Improve Your Practice

The Ethics of Social Media Marketing

- Best Practices
- Retention Issues
- How Long Required To Keep Paperwork

TRILOGY OF SUCCESS



HAS THIS HAPPENED AT YOUR OFFICE?



CLIENT MEETING

- Personal Presence
- Client Awareness
- Legal Process
- Expertise
- Forms
- Substance Abuse Counseling
- Managing Expectations

SAMPLE FORMS

1. Intake Appointment Form
2. DUI Alcohol Worksheet
3. Client Questionnaire
4. Medical Questionnaire
5. Credit Card Authorization
6. Payment Receipt
7. Client Ledger
8. Authorization
9. Waiver of D's Personal Presence
10. Preferred Contact Method
11. Issue Worksheet
12. Taking Audio Notes
13. Taking Video Notes
14. Video Notes

3 FOR CLIENTS

- Paper Them
- Telephone Calls
- Personal Touches

DEALING WITH THE DIFFICULT CLIENT

- The angry client
- The emotional client
- The client with mental health disorder(s)

THE ANGRY CLIENT

-Aggressive

-Loud/Screamer

-Threatening

DEALING WITH THE ANGRY CLIENT

1. Remain calm and professional
2. Listen - they often just need to vent
3. Actively empathize and “kill them with kindness”
4. Identify the issue and find a solution

POURING YOUR HEART OUT



THE EMOTIONAL CLIENT

-“My life is over”

-Emotionally closed/don't listen

- Cryers

DEALING WITH THE EMOTIONAL CLIENT

1. Same points as with angry clients
2. Communicate, educate, let them know what to expect and ask clear questions
3. Don't overwhelm them, take it one step at a time
4. Always have tissue on hand!

THE CLIENT WITH MENTAL HEALTH DISORDER(S)

- Bipolar disorders

- Paranoid schizophrenia

- Post-traumatic stress disorders

DEALING WITH THE CLIENT WHO HAS MENTAL HEALTH DISORDER(S)

1. Listen and try to understand what they are communicating
2. Be respectful
3. Gain their trust
4. Work with a family member to assist as necessary

IMPORTANT FOR DIFFICULT CLIENTS

- Document for everyone's protection – attorneys and employees
- Physical aspect & malpractice clients
- Staff should recognize HM clients and prep attorney for it

CLICK IT OR TICKET



9/19/2018

CLIENT TERMINATION

- Retainer Agreement
- Documentation
- Memo to File
- Work Done v. Threat of Lawsuit
- Personal Choice

3 For Staff

- Compensation
- Accolades
- Marketing Team

You Must Be Clear

- Set expectations
- Lead by example
- Foster team atmosphere
- Do NOT tolerate anything that makes the firm look bad
- Set deadlines
- It's Your Bar Card

ULTIMATE GOALS

- Save time and Save money (Victor Carmody)
- Make \$\$\$ for the firm
- How do you make yourself invaluable for the firm?

MAXIMUM PRODUCTIVITY AND EFFICIENCY

- New client intakes – preparation for attorney
- Follow up with potential new clients after attorney meeting (assisting in closing the deal)
- Assisting with fee agreement documents

WORKING OUT THE KINKS

- Employee handbook
- Documentation/counseling
- Terminations

SOMETIMES STUFF HAPPENS



Website Tools and Resources

- [Courts.ca.gov/forms](https://courts.ca.gov/forms) (find your state's website for judicial council Forms)
- [Leginfo.ca.gov](https://leginfo.ca.gov) (find your state's website for statutes)
- [Paralegaltoday.com](https://paralegaltoday.com)
- [Myparalegalplace.com](https://myparalegalplace.com)

Website Tools and Resources

- Legaltalknetwork.com
- Legalofficeguru.com
- Lexisadvance (office account)
- Other favorite recommendations?

FINANCIAL SECURITY

- Pay Yourself First
- You Must Have Cash Reserves
- Get Financing
- Maximize Credit Expenditures
- SBA
- Do NOT Be Foolish
- Create Incentive Programs for Employees

FEE COLLECTIONS

- In-house vs. outsourcing fee collections
- In-house: have a valid credit card on file and make it an office policy
- In-house: schedule reminders to charge card and track payments

FEE COLLECTIONS

- Move quickly on collecting overdue accounts -there is a higher chance of getting money if overdue 60 days vs. overdue 6 months
- Stay friendly and professional but firm with overdue clients - they tend to come up with a lot of excuses

CREDIT CARD PROCESSING SERVICES

- LawPay – credit card processing
Lawpay.com
- Lex/Actum – payment solutions for law firms
Lexactum.com
- PayPros Legal – payment processing solution
Payproslegal.com

3 For Yourself

- Mental
- Physical
- Emotional

MAXIMUM PRODUCTIVITY AND EFFICIENCY

- Time management/balance
- Creating and maintaining tasks lists
- Juggling emails, phone calls, projects

WHEN YOUR ATTORNEY STRIKES OUT



WORK HARD/PLAY HARD

- Reinvent Yourself
- Be Authentic
- Professionalism Counts

- Take Time For Yourself
- You Must Schedule Relaxation/Vacations
- 30-60-90 days/1-5-10 years: Adjust Regularly

Special thanks to *Lorena Hughes* for assisting in the preparation of this PPT

THANK YOU to my support team!

Lorena Hughes



Suzie Mendoza



Maritza Flores



FOR AN ELECTRONIC COPY OF THESE SLIDES

TEXT: HomeRun to: (949) 531-7060

and follow the prompts