

Business School for Lawyers

Get the Business Concepts
to Grow Your Practice

EACH PROGRAM
6.5 CLE
1 EPR



BSL 201: Business Plans for Lawyers

Live Seminar & Live Webcast: August 13, 2014

Webcast Replay: August 19, 2014 • September 2, 2014
September 8, 2014 • September 22, 2014

BSL 301: Business Principles for a Successful Law Firm

Live Seminar & Live Webcast: September 16, 2014

Webcast Replay: September 23, 2014 • September 29, 2014
October 7, 2014 • October 15, 2014



Business School for Lawyers

BSL 201: Business Plans for Lawyers

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BSL 301: Business Principles for a Successful Law Firm

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Webcast: September 16, 2014

REPLAY Webcast: September 23, 2014
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Webcast: October 15, 2014

Get the Business Concepts to Grow Your Practice – As part of the new Business School for Lawyers initiative, the State Bar of Wisconsin is proud to introduce *BSL 201: Business Plans for Lawyers* and *BSL 301: Business Principles for a Successful Law Firm*. To help lawyers succeed as business owners, Business School for Lawyers (BSL) will include these seminars, featured breakout sessions at Wisconsin Solo & Small Firm Conference, and other products. Learn more at bsl.wisbar.org.

Go Beyond Checklists to Learn the Concepts – Law firm checklists and “How to Start a Law Firm” seminars are invaluable resources and can be considered on par with a 101 class. The BSL seminars take law firm management to the next level and provide guidance in strategic planning and critical decision-making.

BSL 201: Business Plans for Lawyers – Ideal for new graduates, experienced lawyers looking for a change, or current law firm owners wanting a refresher, *BSL 201* will help you:

- Identify the characteristics of an entrepreneur and how they apply to you
- Learn the essentials of a business plan specifically designed for law firms
- Gain a basic knowledge of concepts related to operations, financial management, marketing, and human resources
- Understand the important ethics rules that must be followed when you own a law practice
- Network with other lawyers who are considering or have opened a law firm

BSL 301: Business Principles for a Successful Law Firm – In addition to *BSL 201* attendees, *BSL 301* is perfect for current law firm owners or lawyers who have experience working in a law firm. The seminar will help you:

- Assess your expectations for your law firm and yourself
- Analyze your business plan to determine if it complies with special regulations
Please note: A business plan is not mandatory to attend, but can be brought to share with coaches and fellow attendees.
- Learn more advanced business school concepts related to operations, financial management, marketing, and human resources
- Dive deeper into the ethical obligations of operating a law practice
- Network with fellow law firm entrepreneurs at a reception

Register for these seminars today and keep your eye out for more services and products from the Business School for Lawyers initiative in the near future.

Get the tools and guidance needed to create your business plan after the seminar.

After the seminar, you'll be able to:

- Create a business plan
- Put business concepts into practice
- Navigate related ethics issues
- Network with fellow attendees during the live seminar's lunch

Faculty

Jeffrey S. Krause, Program Chair
Solfecta LLC, Waterford

Christopher G. Carman
ActionCOACH, Elm Grove

David M. Elmer
Jannsen & Co., Pewaukee

Mark J. Goldstein
Goldstein Law Group, Milwaukee

Aviva M. Kaiser
State Bar of Wisconsin, Madison

Timothy J. Pierce
State Bar of Wisconsin, Madison

Program Schedule

8:00 AM Registration

8:30 AM **Entrepreneurship for Lawyers: Are You Really Cut Out for This?**

- How to be an entrepreneur
- Self-assessment of expectations and risk tolerance
- What is your vision for your business now, in 5 years, and in 10 years?
Christopher G. Carman

9:00 AM **Business Plans for Lawyers**

- What is a "law firm" business plan?
- Developing your mission statement
- Determining your basic needs, future needs, and unnecessary items
- Focusing on your competitive advantage in your elevator pitch
- Finding additional resources
Jeffrey S. Krause

10:00 AM Break

10:15 AM **Business School Basics: Operations**

- Entity structure
- Systems and software
- Tax considerations
David M. Elmer, Jeffrey S. Krause

11:00 AM **Business School Basics: Financial Management**

- Analyzing income and costs
- Projecting earnings
- Ensuring consistent cash flow
Christopher G. Carman

12:00 PM **Networking Lunch**

1:00 PM **Business School Basics: Marketing**

- Evaluating the market
- Targeting advertising
Christopher G. Carman

2:00 PM **Business School Basics: Human Resources**

- Managing people: staff, interns, partners
- Scheduling and prioritizing tasks
Mark J. Goldstein

3:00 PM Break

3:15 PM **Ethics For Real: How to Stay Out of Trouble When You May Not Know What You Are Doing**

- Social media marketing (blogs, rating services, Facebook, LinkedIn)
- Firm names and letterheads
- Expectations, comparisons, and guarantees
- Specialists and experts
- Groupon and Daily Deals
- Firm websites
Mark J. Goldstein, Aviva M. Kaiser, Timothy J. Pierce

4:15 PM **Networking/Leadership**

- Networking within and outside practice area
- Collateral referrals
- State Bar and community involvement
Christopher G. Carman

4:30 PM **Program Concludes**

Dive further into the business concepts that will help you grow your practice ethically, efficiently, and effectively.

After the seminar, you'll be able to:

- Put your business plan into action
- Find work-life balance as a small business owner
- Strategically manage operations, finances, marketing, and staff
- Navigate related ethics issues
- Network with fellow law firm entrepreneurs at the live seminar's reception

Faculty

Jeffrey S. Krause, Program Chair
Solfecta LLC, Waterford

Mark J. Goldstein
Goldstein Law Group, Milwaukee

Aviva M. Kaiser
State Bar of Wisconsin, Madison

Jennifer Konieczka
Jannsen & Co., Pewaukee

Thomas J. Palzewicz
ActionCOACH, Elm Grove

Timothy J. Pierce
State Bar of Wisconsin, Madison

Program Schedule

8:00 AM Registration

8:30 AM **Time Management for Lawyers: Are You Living to Work or Working to Live?**

- New practice models
- Quality of life issues
- What are reasonable expectations
Thomas J. Palzewicz

9:00 AM **Business Plans for Lawyers**

- Review of business plan essentials
- How to assess your business plan
Jeffrey S. Krause

10:00 AM Break

10:15 AM **Business School Advanced Topics: Operations**

- Accounting methods

- How to improve collections and increase revenue
Jennifer Konieczka, Jeffrey S. Krause

11:00 AM **Business School Advanced Topics: Financial Management**

- Analyzing profitability
- Building a book of business
- Client acquisition costs
- Cash flow forecasting (in/out and internal)
- Managing accounts receivable
Thomas J. Palzewicz

12:00 PM **Lunch (on your own)**

1:00 PM **Business School Advanced Topics: Marketing**

- Refining your niche
- Distinguishing yourself from the competition
- Regularly reviewing market trends and competition
- Getting and giving referrals
Thomas J. Palzewicz

2:00 PM **Business School Advanced Topics: Human Resources**

- Managing people: staff, interns, partners
- Analyzing profitability of support staff, contract attorneys, of-counsel, etc.
- Meeting expectations using client communication metrics
Mark J. Goldstein

3:00 PM Break

3:15 PM **Ethics For Real: How to Stay Out of Trouble When You May Not Know What You Are Doing**

- Screening and evaluating clients
- Drafting fee agreements
- Handling difficult clients
Mark J. Goldstein, Aviva M. Kaiser, Timothy J. Pierce

4:15 PM **Networking/Leadership**

- Speaking engagements
- Leadership opportunities
- Giving back
Thomas J. Palzewicz

4:30 PM **Program Concludes: Networking Reception to Follow**

CREDITS / TUITION

EACH full-day program has been submitted to the Wisconsin Board of Bar Examiners for up to **6.5 CLE credits including 1.0 EPR credit**. Marketing and networking sessions are not eligible for CLE credit.

The *BSL 201* live and live webcast seminars on August 13, 2014 and the *BSL 301* live and live webcast seminars on September 16, 2014 will also be submitted for Minnesota CLE credit.

Live Seminar (tuition for EACH full-day program)

State Bar of Wisconsin Member	\$219
WALA Member	\$219
Active New Member*	\$99
Nonmember	\$249
Ultimate Pass Subscriber	\$0

Live Webcast or Webcast Replay (tuition for EACH full-day program)

State Bar of Wisconsin Member	\$249
WALA Member	\$249
Active New Member*	\$129
Nonmember	\$279
Ultimate Pass Subscriber	\$0

***Active New Member:** Attorneys within three years of admission to the State Bar of Wisconsin.

LOCATION

Live Seminar Location

Madison, State Bar Center

5302 Eastpark Blvd., American Center, (608) 257-3838

REGISTRATION

- Online:** bsl.wisbar.org » credit card or Ultimate Pass only
- Phone:** (800) 728-7788 » credit card or Ultimate Pass only
- Fax:** (608) 257-5502 » credit card or Ultimate Pass only
- Mail:** State Bar PINNACLE Registrations
P.O. Box 7158, Madison, WI 53707-7158
check, credit card, Passbook, or Ultimate Pass

STATE BAR CLE/PINNACLE PASSBOOK REGISTRATIONS – Passbook Certificates must be received by the State Bar at least one business day prior to the event. For live and video seminars, walk-in registrations with the Passbook Certificates are welcome.

REGISTRATION CANCELLATIONS – Please visit www.wisbar.org/cancellation_policy for information on PINNACLE registration cancellation policies.

Business School for Lawyers

Priority Code: S 2 9 5 8 T B

Tuition enclosed:

Tuition shown below is for EACH full-day seminar.

	Live Seminar	Live Webcast or Webcast Replay
<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$219	<input type="checkbox"/> \$249
<input type="checkbox"/> WALA Member	<input type="checkbox"/> \$219	<input type="checkbox"/> \$249
<input type="checkbox"/> Active New Member*	<input type="checkbox"/> \$99	<input type="checkbox"/> \$129
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$249	<input type="checkbox"/> \$279
<input type="checkbox"/> Ultimate Pass Subscriber	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
<input type="checkbox"/> Passbook Certificate User	<input type="checkbox"/> One Certificate	<input type="checkbox"/> One Certificate

*Active new members are attorneys within three years of admission to the State Bar of Wisconsin

Scholarships may be available.

I will attend the following seminar(s):

BSL 201: Business Plans for Lawyers

- Live Seminar: Wednesday, August 13, 2014 – Madison
- Live Webcast: Wednesday, August 13, 2014
- Webcast Replay: Tuesday, August 19, 2014
- Webcast Replay: Tuesday, September 2, 2014
- Webcast Replay: Monday, September 8, 2014
- Webcast Replay: Monday, September 22, 2014

BSL 301: Business Principles for a Successful Law Firm

- Live Seminar: Tuesday, September 16, 2014 – Madison
- Live Webcast: Tuesday, September 16, 2014
- Webcast Replay: Tuesday, September 23, 2014
- Webcast Replay: Monday, September 29, 2014
- Webcast Replay: Tuesday, October 7, 2014
- Webcast Replay: Wednesday, October 15, 2014

Lawyer State Bar Member No. _____

Nonlawyer Profession _____

Name _____

Firm Name _____

Address _____

City/State/Zip _____

Phone Number _____

Email _____

Payment: Total Amount Enclosed: \$ _____

State Bar Passbook Certificate (list certificate number(s) # _____ # _____)

Check enclosed (payable to State Bar CLE)

Ultimate Pass Gold Subscriber Ultimate Pass Silver Subscriber

VISA MasterCard American Express Discover Exp. Date _____

Card No. _____

Signature _____

Tuition includes written course materials. To purchase written course materials for those **not** attending this program, contact the State Bar at (800) 728-7788.

Four Easy Ways to Register!

Online: bsl.wisbar.org
credit card or Ultimate Pass only

Phone: (800) 728-7788 » credit card or Ultimate Pass only

Fax: (608) 257-5502 » credit card or Ultimate Pass only

Mail: State Bar PINNACLE Registrations
P.O. Box 7158, Madison, WI 53707-7158
check, credit card, Passbooks, or Ultimate Pass

NOTICE: By attending this State Bar event, you understand and agree that you may be photographed and/or electronically recorded during the event and you hereby grant to the State Bar the right to use and distribute your name and likeness for promotional or educational purposes without monetary compensation. The State Bar assumes no liability for such use.

Event Codes: 201 – CA2136MWR2R3R4
301 – CA2137MWR2R3R4

More Opportunities to Learn Business Concepts!



The annual *Wisconsin Solo & Small Firm Conference* offers an array of topics relevant to people opening or expanding a law practice throughout the life-cycle of a law firm. In addition, plenaries and sessions explore how lawyers can find work-life balance. Below is a list of breakout sessions relevant to the Business School for Lawyers initiative. **Look for the BSL icon for sessions tailored to give you the business knowledge to succeed as a law practice owner!**



Thursday, October 23, 2014

Ready to grow your practice? The three-hour pre-conference seminar will focus on adding and managing staff and employees, followed by a comedic presentation on practicing law. Plenary sessions highlight how to communicate at home and work to maximize possibilities. Additional topics include:

- Hanging Your Shingle – Part 1
- Dealing with Difficult People
- Top Ten Ways To Grow Your Practice on a Budget
- Document Management

Friday, October 24, 2014

Plenary sessions highlight how to understand financial personalities and how that affects the practice of law. Additional topics include:

- The Economics of Law in Wisconsin
- What to Do When OLR Calls
- Don't Lose Sight of Happiness
- Tips and Tricks for Productivity and Profitability
- Planning for Disaster

Saturday, October 25, 2014

Plenary sessions include Nerino Petro's guide to law firm "Gizmos, Gadgets, and Widgets" and ethics presentations from CLE performer, Stuart Teicher. Additional topics include:

- Hanging Your Shingle – Part II
- Setting Up and Running a Remote Virtual Office
- Taking Office 365 To the Next Level



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P.O. Box 7158, Madison, WI 53707-7158

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