



STATE BAR  
OF WISCONSIN

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

## Intentionally Design a Practice to Serve the Latent Legal Market *Featuring Anne-Marie Rábago*

**IN-PERSON SEMINAR:** Wednesday, May 15, 2024 –  
Madison

**LIVE WEBCAST:** Wednesday, May 15, 2024

**WEBCAST REPLAYS:** Friday, May 24, 2024

Thursday, May 30, 2024

Tuesday, June 4, 2024

Monday, June 17, 2024

Thursday, July 18, 2024

Wednesday, August 14, 2024



STATE BAR OF WISCONSIN  
**PINNACLE**

# Intentionally Design a Practice to Serve the Latent Legal Market *Featuring Anne-Marie Rábago*

*Endorsed by the Solo Small Firm & General  
Practice Section of the State Bar of Wisconsin*



**6.5 CREDIT HOURS:**

- 4.5 LPM credits
- 2.0 LAU credits

**Programs start May 15. Register today!**

# Intentionally Design a Practice to Serve the Latent Legal Market

Featuring Anne-Marie Rábago



Endorsed by the Solo Small Firm & General Practice Section of the State Bar of Wisconsin

## Meet your market

In an era where people increasingly turn to the internet for DIY legal solutions, a substantial segment of the population remains underserved – the latent legal market. Addressing the needs of this group not only unlocks new opportunities for legal practitioners but also helps to narrow the access to justice gap. Explore innovative strategies that cater to an untapped legal market at *Intentionally Design a Practice to Serve the Latent Legal Market* featuring Anne-Marie Rábago.

## How you'll benefit:

- Learn strategies for building a successful modern law firm
- Zero in on a practice niche based on your unique strengths, talents, and desires
- Attract your most ideal clients through effective outreach, intake, and delivery systems
- Understand the value of maintaining low overhead and prioritizing firm expenditures
- Create systems, processes, and checklists to optimize efficiency, quality, and effectiveness
- Leverage existing and emergent technologies in your firm operations
- Deliver legal services that meet and exceed client expectations
- Nurture social connections to build a community for personal well-being and career satisfaction

## Who should attend:

- New lawyers
- Solo and small firm practitioners
- Public interest lawyers
- Government lawyers
- Lawyers in "Big Law"
- Law firm owners
- Law school graduates
- Law students
- Firm administrators
- Paralegals

Seize the opportunity to broaden your practice's reach and impact with help from *Intentionally Design a Practice to Serve the Latent Legal Market* featuring Anne-Marie Rábago. **Register today!**



## Dates / Location

### In-Person Seminar

Wednesday, May 15, 2024  
**State Bar Center**  
5302 Eastpark Blvd., Madison

### Live Webcast

Wednesday, May 15, 2024

### Webcast Replays

Friday, May 24, 2024  
Thursday, May 30, 2024  
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## Registration

**Online:** [wisbar.org/seminars](http://wisbar.org/seminars)

**Phone:** (800) 728-7788

**Fax:** (608) 257-5502

**Mail:** State Bar PINNACLE Registrations

P.O. Box 7158

Madison, WI 53707-7158

### State Bar CLE/PINNACLE Passbook registrations:

Passbook certificates must be received by the State Bar at least one business day prior to the event.

### Registration cancellations:

Please visit [wisbar.org/cancellations](http://wisbar.org/cancellations) for information on PINNACLE registration cancellation policies.

### Course materials for those attending the seminar:

Course materials are provided in PDF format and are downloadable from *myStateBar* on [wisbar.org](http://wisbar.org) up to two days prior to and 90 days after your seminar.

### COVID-19 safety information:

Complete and current safety guidelines can be found at [wisbar.org/covidsafety](http://wisbar.org/covidsafety).

*Be a star both in and out of the courtroom with the State Bar of Wisconsin PINNACLE National Presenter Series. Receive coaching from nationally recognized speakers with experience helping lawyers rise to the challenges of today's legal landscape.*



# Schedule

## 8:00 AM Registration

## 8:30 AM Introduction to the Seven Strategies for Success (LPM)

- Design a modern law firm with intention
- Make strategic, operational decisions
- Define success by your terms

## 9:00 AM The Latent Legal... What? (LPM)

- Recognize the product/market fit problem in legal
- Understand the opportunity and need for accessible legal services delivery
- Reach an underserved and untapped population of potential clients

## 9:30 AM Focus and Develop a Niche (LAU)

- Serve a discrete client base with a discrete set of offerings
- Explore finding your Ikigai based on experience and self-knowledge
- Generate motivation, confidence, competence, and efficiency by focusing

## 10:00 AM Break

## 10:15 AM Identify and Attract Your Most Ideal Clients (LPM)

- Craft your ideal client profile
- Establish a "Red Velvet Rope Policy" to reduce friction in the attorney-client relationship
- Value the role emotions play in a potential client's hiring decision

## 10:45 AM Create and Document Systems, Processes, and Checklists (LPM)

- Identify systems and map out processes utilized in your firm operations
- Consider the steps in each process to optimize efficiency
- Improve outcomes by using checklists for repeatable tasks

## 11:30 AM Lunch Break (on your own)

## 1:00 PM Infuse Technology (LPM)

- Recognize useful technology tools for each stage of your client's journey
- Assess and select technology tools to enhance your legal tech stack
- Implement technology that improves your legal service delivery

## 1:45 PM Keep Overhead Low (LPM)

- Determine what it means to know your numbers
- Evaluate expenses critically to ensure sustainability and increase flexibility

## 2:15 PM Break

## 2:30 PM Excel in Execution (LAU)

- Identify practical strategies to triage legal tasks and manage your daily workflow
- Develop practices to combat resistance and procrastination
- Cultivate and protect time for the focused work inherent to the practice of law
- Reduce overwhelm using Agile methodologies

## 3:30 PM Find Community (LAU)

- Explore the importance of social connections in fostering positive wellbeing
- Build a supportive network of like-minded and similarly situated professionals

## 4:00 PM Program Concludes

*Following program start time, schedule may vary slightly from above listed times.*

## Featured Presenter

**Anne-Marie Rábago** (she/her) is the founder and principal of Modern Juris, which trains lawyers to build successful businesses. She is a tax lawyer dedicated to empowering lawyers with the skills necessary to break down barriers to legal access and make fundamental systemic changes. Since 2009, she has educated and advised thousands of lawyers on solo and small firm practice opportunities and challenges, initially through her law firm and as the director of two legal incubators.



## Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for up to **6.5 credit hours** consisting of:

- **4.5 LPM credits**
- **2.0 LAU credits**

**About LPM & LAU credits:** Attorneys may submit up to 6.0 LPM (Law Practice Management) and up to 6.0 LAU (Lawyer Awareness and Understanding) credits per CLE reporting period. To learn more about CLE credit types and rules, visit [wisbar.org/credits](http://wisbar.org/credits).

## Additional Learning Opportunities

### Creating an Accessible and Inclusive Practice (1 LAU)

Make your practice more open and accessible to people with disabilities with insights on how Title III of the Americans with Disabilities Act (ADA) applies to law offices. Hear best practices for client intake, get resources for evaluating your building accommodations, and identify important accessibility considerations.

Webcast Seminar: May 2, 2024 | May 21, 2024

### Your Guide to the Corporate Transparency Act (3 CLE)

The Corporate Transparency Act (CTA) took effect in January 2024 and failure to comply with its reporting requirements can result in significant civil or criminal penalties. Be prepared to advise your clients and your law firm on compliance with the CTA with guidance on definitions, covered entities, reporting, and exemptions.

Webcast Seminar: April 26, 2024 | May 29, 2024 | June 26, 2024

### Wisconsin Attorney's Desk Reference

Think of it as an encyclopedia for lawyers, with information on 11 practice areas and 35 topics grouped by related subject areas. Perfect as a primer, refresher, or a starting point, the *Desk Reference* is a user-friendly guide for any attorney who needs a quick answer to a question or an introduction to an area of law.

Print Book: #AK0003E23; 1,324 pp; 2023; Member: \$199 | Nonmember: \$248.75  
Books Unbound® Subscription: #AE003\_SUB; Member: \$196 | Nonmember: \$245

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Civil Litigation



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& Elder Law



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Priority Code:  
**S4366B**

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<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$299	<input type="checkbox"/> \$329
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$399	<input type="checkbox"/> \$429
<input type="checkbox"/> Ultimate Pass Gold/Silver	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
<input type="checkbox"/> Passbook Certificate	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

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Lawyer State Bar Member No. \_\_\_\_\_

Nonlawyer Profession \_\_\_\_\_

Name \_\_\_\_\_

Firm Name \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

**PAYMENT:** Tuition Amount Enclosed \$ \_\_\_\_\_

State Bar Passbook Certificate (enter certificate number) # \_\_\_\_\_

Check enclosed (payable to State Bar PINNACLE) \_\_\_\_\_

Ultimate Pass Gold  Ultimate Pass Silver

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**Mail to:** State Bar PINNACLE Registrations  
P.O. Box 7158  
Madison, WI 53707-7158

Event Code: CA3618 M W R R2 R3 R4 R5 R6