LAW FIRM

Communication Playbook

The Official Workbook of the Smith.ai Educational Series

smith

CONTENTS

INTRODUCTION

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Welcome to the next chapter of your law firm's future. The workbook you hold in your hands today will provide you with a map, an outline, and real-world examples of how simple processes and technology can be used to build a systematic business that enhances every aspect of your work.

The session you are attending was created to serve the legal community as the pressure of consumer demands continues to grow. Our lives have changed. What once could be done in a few days is now expected to be done on demand.

To get ahead of the consumer expectation curve, you will learn how to build processes and scripts that bring control and sanity to your day. By combining the power of technology and human resources, you can leverage time in ways that deliver tremendous value to your clients while keeping you focused on the highest priority tasks.

Before we begin, it is important to note: Do not get overwhelmed. You will not accomplish everything in this workbook in one day. The purpose of this program is to give you a map to the summit of the mountain. Each section is part of the overall journey, and for you to take at your own pace.

We begin with understanding the importance of managing the hours of our day, and the effect automation has on billable time and profitability. Only, after you value your time, can you decide how to best manage it. As business owners, time management is one of our greatest challenges, both personally and professionally.

As you work through the exercises in each chapter, recognize where you are today and keep the vision of where you want to be at the top of your mind. Every attendee of my courses begins from a different place. The goal of this program is to design the systems that will take you to where you want to be in the near future, and beyond.

Remember that I am here to be your guide, but you are the hero of your own story. I welcome you to reach out when you need help, long after you leave the classroom.

Let's go!

Maddy

To request Maddy as a speaker, panelist, or moderator — and to access full program descriptions, recordings, and presentations — please contact her at maddy@smith.ai.

Ethical Responsibility – ABA Model Rules of Conduct

We will begin with the motivation behind the creation of the Smith.ai Law Firm Communication Playbook and the corresponding educational program. Our goal is to support and provide a comprehensive resource for solo and small-firm attorneys for improving their abilities to serve their clients and to maintain a standard of excellence according to the ABA Model Rules and Ethics Opinions.

As a practicing attorney, ABA Model Rule 1.4 outlines the Client-Lawyer Relationship. The importance of attorney-client communication and responsiveness is more important now than ever before. The number one malpractice complaint is lack of communication from the law firm to the client. Often instigated by lagged or zero responsiveness to calls, emails, and messages, ethical complaints can endanger the reputation of the law firm, reduce new client referrals, and put attorneys' ability to practice at risk.

In 2017, the ABA's Standing Committee on Ethics and Professional Responsibility published Formal Opinion 477, and, in Section II, it is noted that Duty of Competence now includes the knowledge of the benefits and risks associated with relevant technology, and the necessity to engage in study and education around such options in order to best represent and service the lawyer's client.

By participating in the following program, completing the exercises, and implementing responsive systems in your law firm, you will reduce the risk of ethical complaints, increase client satisfaction and referrals, and build a strong foundation for your business.

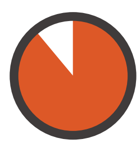
The State of Law Firm Customer Acquisition

Traditionally, law firms were able to generate business solely from word-of-mouth marketing, referrals, and a good physical location.

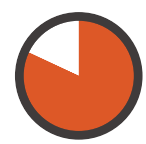
Today, consumers are searching for legal services online and they compare the experience they receive to the retailers they frequent; namely, response time, ease of making an appointment, and the overall customer journey.

Consumer Buying Statistics Affecting Law Firms

As reported in a recent HubSpot Consumer Research Study, and the 2017 and 2018 Clio Legal Trends Reports:

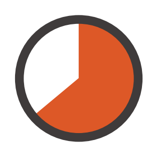


89% of consumers expect an immediate response to a customer service issue



82% of consumers expect an immediate response when inquiring about services

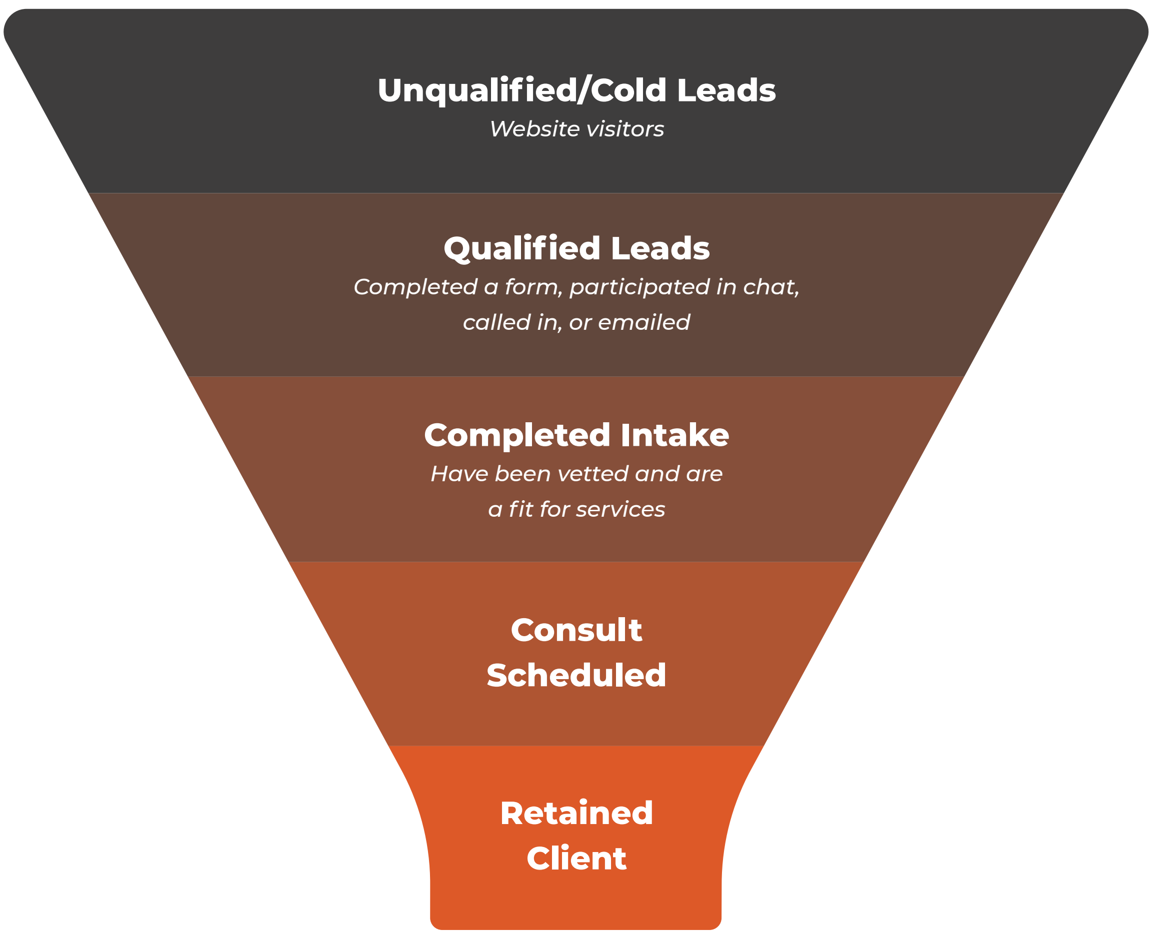
67% of law firm clients say their "decision to hire" is most influenced by an attorney's initial responsiveness to their first call or email



64% of legal consumers look for an attorney who offers a free initial consult

Understanding the Law Firm Sales Funnel

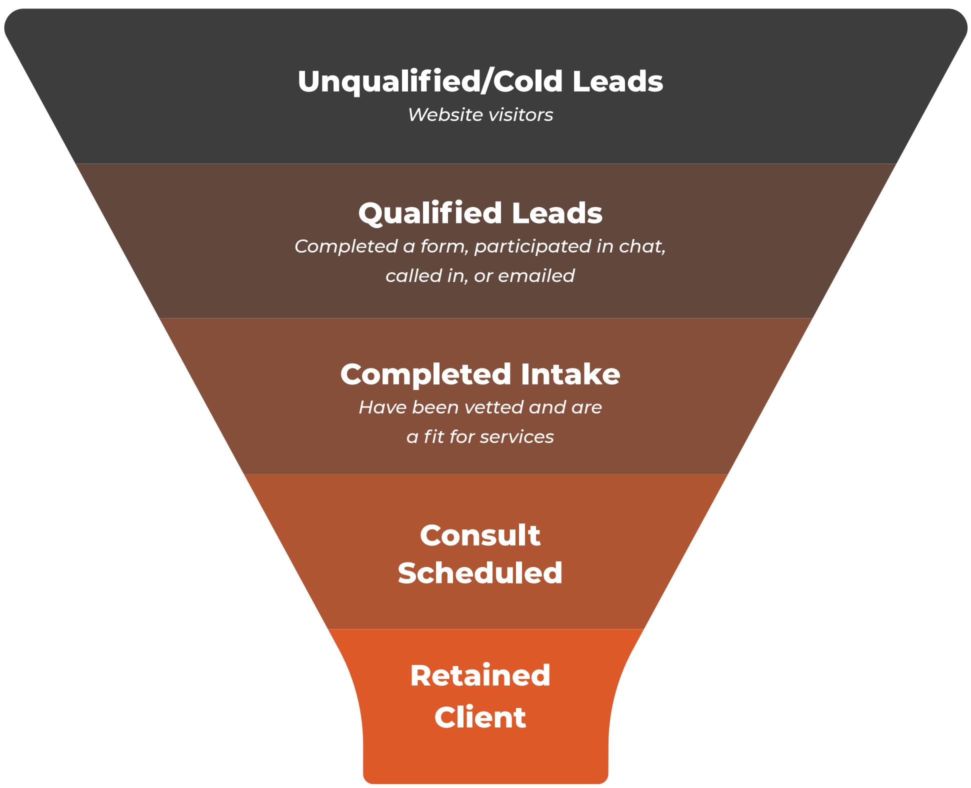
Sales terms, metrics, and ideology are not often discussed, and the following visuals and exercises are designed to measure where your law firm stands today. You can use this information to build a formula that you can use to 'multiply' your cash flow by increasing the volume of potential new clients, conversion rate, or both.



EXAMPLE

Sample Law Firm Marketing ROI Funnel

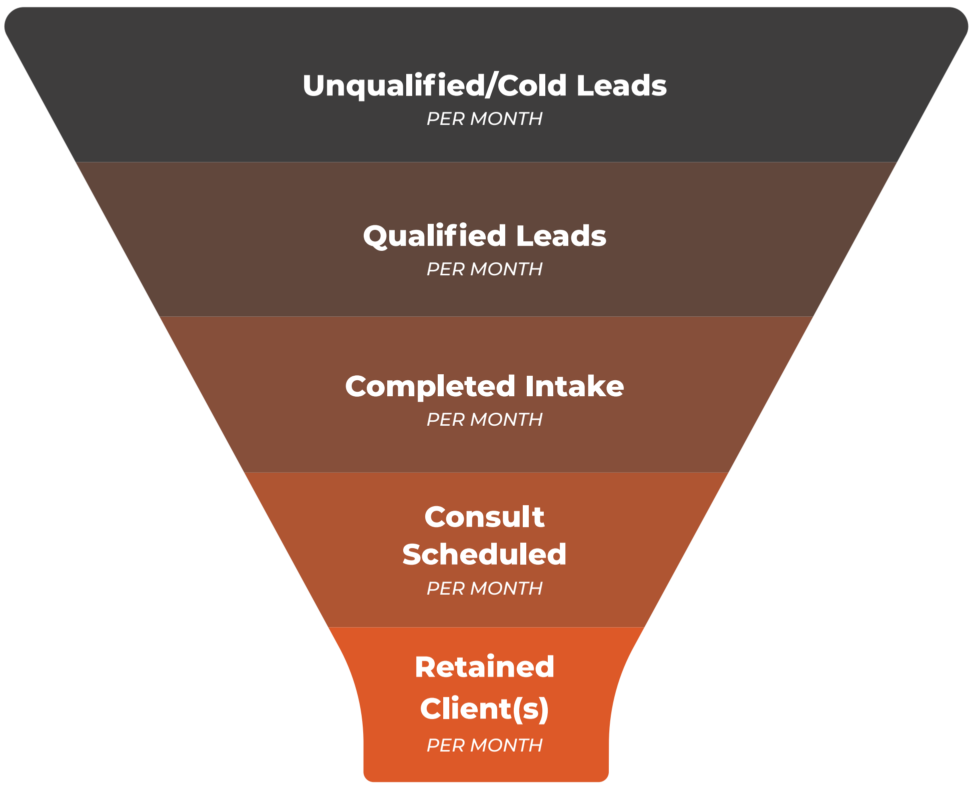
Before we dive in to the ‘how to’ of automating your law firm, it is critical to understand why tracking time, profitability, and marketing costs are so important. An appreciation for the statistics and financial implications of the numbers below can be the difference between being able to operate as a business owner and simply functioning as an employee of your firm.



CONVERSION METRICS	COST AND REVENUE	MARKETING COA & ROI
1,000 Visitors	$5,000	$5.00 Visitor
80 Leads		$62.50 Lead
40 Qualified Opportunities		$125.00 Opportunity
20 Consultations		$250.00 Consultation
10 Retained Clients	$20,000	$500.00 Client

LAW FIRM MARKETING: COST OF ACQUISITION (COA) & RETURN ON INVESTMENT (ROI)

Complete the chart below with estimates of the number of contacts that move through your law firm's funnel per month (PM).



CONVERSION METRICS	COST AND REVENUE	MARKETING COA & ROI
Visitors:	Monthly Spend:	Visitor:
Leads:		Lead:
Qualified Opportunities:		Opportunity:
Consultations:		Consultation:
Retained Clients:	Case Value:	Client:

The Impact of Outsourcing and Systems

The challenge of running a law firm today is twofold: one, keeping enough business flowing through the door, and two, delivering work to clients in a timely fashion.

Delegation, or outsourcing to virtual resources, is gaining popularity as a means for achieving profitability as a solo or small law firm. The diagram below demonstrates the potential for doubling profit margins by leveraging contract, part-time, or remote support.

BILLABLE RATE TO CLIENT $250

COST	COST
Your cost: $150	**Outsourced: $50**
Profit: $100	**Profit: $200**

Are you Lawyering or Laboring?

The 2017 and 2018 Clio Legal Trends Reports uncovered staggering daily averages of the actual time allocations recorded by solo practitioners and small law firms.

2 hours lost to recovering from interruptions

1.9 hours spent on billable work

2 hours spent on business development

2.9 hours spent on admin tasks

IDENTIFYING OPPORTUNITIES FOR AUTOMATION

GOAL

Confront the time you spend daily on the most common law firm tasks.

INSTRUCTIONS

In the table below, write down the percentage of time you are currently spending on each type of task or business process.

% OF TIME	STAGE	TASKS
	Lead Generation	
	Client Intake	
	Case Details	
	Correspondence	
	Word Processing	
	Delivery/Decision	
	Completion & Referrals	

Meeting Consumer Expectations

Beyond the time, energy, and money required to find and service new client work, solo and small law firms face another major challenge: the opportunity cost of handling routine communications and administrative duties.

Recent consumer studies indicate that the popularity of Live Chat services is more about the need to meet the increasing demands and expectations of consumers. In fact, over 82% of consumers expect a near-instant response when calling a business to inquire about services. And, more than 90% of existing clients expect a response when reaching out for a service-related issue.

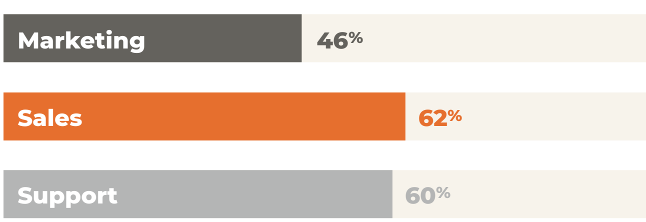
Consumers are Impatient

Speed is everything to today's buyers, and patience wears out at 10 minutes.

82% of consumers rate an "immediate" response as important or very important when they have a marketing or sales question.

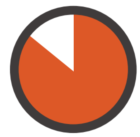
90% of consumers rate an "immediate" response as important or very important when they have a customer service question.

Percentage of consumers who define "immediate" as 10 minutes or less, by their stage in the customer journey.



The Opportunity Cost of Operating Without Systems

Additional surveys have shown that, without systems or proper delegation of tasks, conversion rates and revenue are significantly reduced. From basic inbound phone call handling, to post-consultation outreach, balancing business development tasks with everyday casework is no easy feat for law firms of any size.



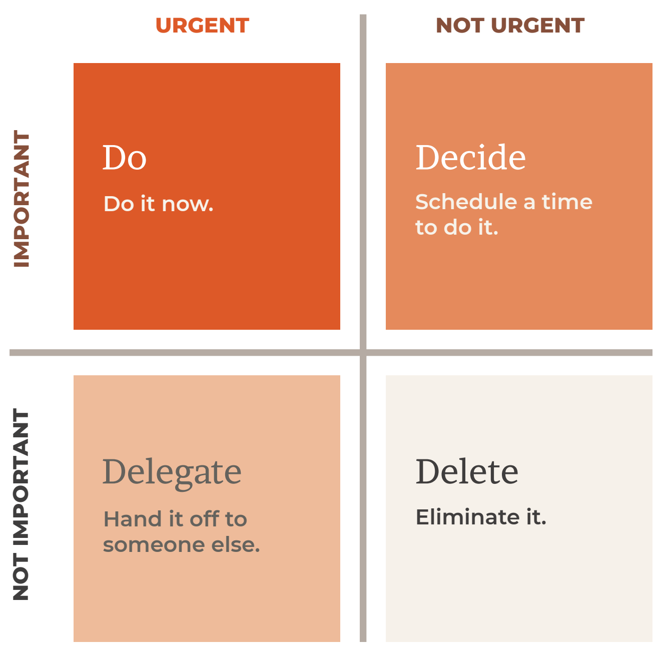
86% of a law firm's earnings are ever collected

67% of potential new clients (PNCs) based their "decision to hire" on an attorney's responsiveness to their first call or email

59% of PNCs did not hire an attorney after the consult

Eisenhower Decision Matrix

The 34th President of the United States, Dwight Eisenhower was responsible for the launch of programs that led to the development of our highway system, the creation of the internet, and the exploration of space. Over the course of his two presidential terms, Eisenhower had a number of methods for time and task management that have been painstakingly studied ever since. His most famous productivity tool is known as the Eisenhower Decision Matrix.



EISENHOWER DECISION MATRIX

GOAL

Pinpoint specific work that you can outsource or automate.

INSTRUCTIONS

Review the Eisenhower Matrix and complete the table below by identifying between two and ten tasks you are currently doing that could be delegated to a staff member, outsourced service, or software program.

TASK TO DELEGATE	STAFF / TECHNOLOGY/ SERVICE

The Impact of Outsourcing: Increase Marketing ROI and Conversion Rates by Improving Responsiveness

Studies have shown that the implementation of software and services such as Live Chat, Virtual Receptionists, and Online Calendaring tools increase both lead conversion rates (website visitors into leads) and the total number of opportunities (appointments scheduled) between 20-30%.

The Results: Outsourcing Impact Summary

By implementing virtual services, a solo attorney in Georgia experienced a 30% decrease in their cost of acquisition (COA).

- **Increase in Revenue:** $7,500.00 per month, $90,000 per year = 3.75 new cases per month
- **Decrease in Cost of Acquisition:** 30% decrease in Cost of Acquisition = $360 per client

EXAMPLE

Law Firm Marketing Cost of Acquisition (COA) and Return on Investment (ROI)

CONVERSION METRICS	COST AND REVENUE	MARKETING COA & ROI
1,000 Visitors	$5,000	$5.00 Visitor
110 Leads		$45.45 Lead
55 Qualified Opportunities		$90.00 Opportunity
27.5 Consultations		$180.00 Consultation
13.75 Retained Clients	$27,500	$360.00 Client

REINVESTMENT OF REVENUE

GOAL

Identify the top two areas of your work or personal life where an infusion of cash would yield the greatest positive impact to you and/or your business.

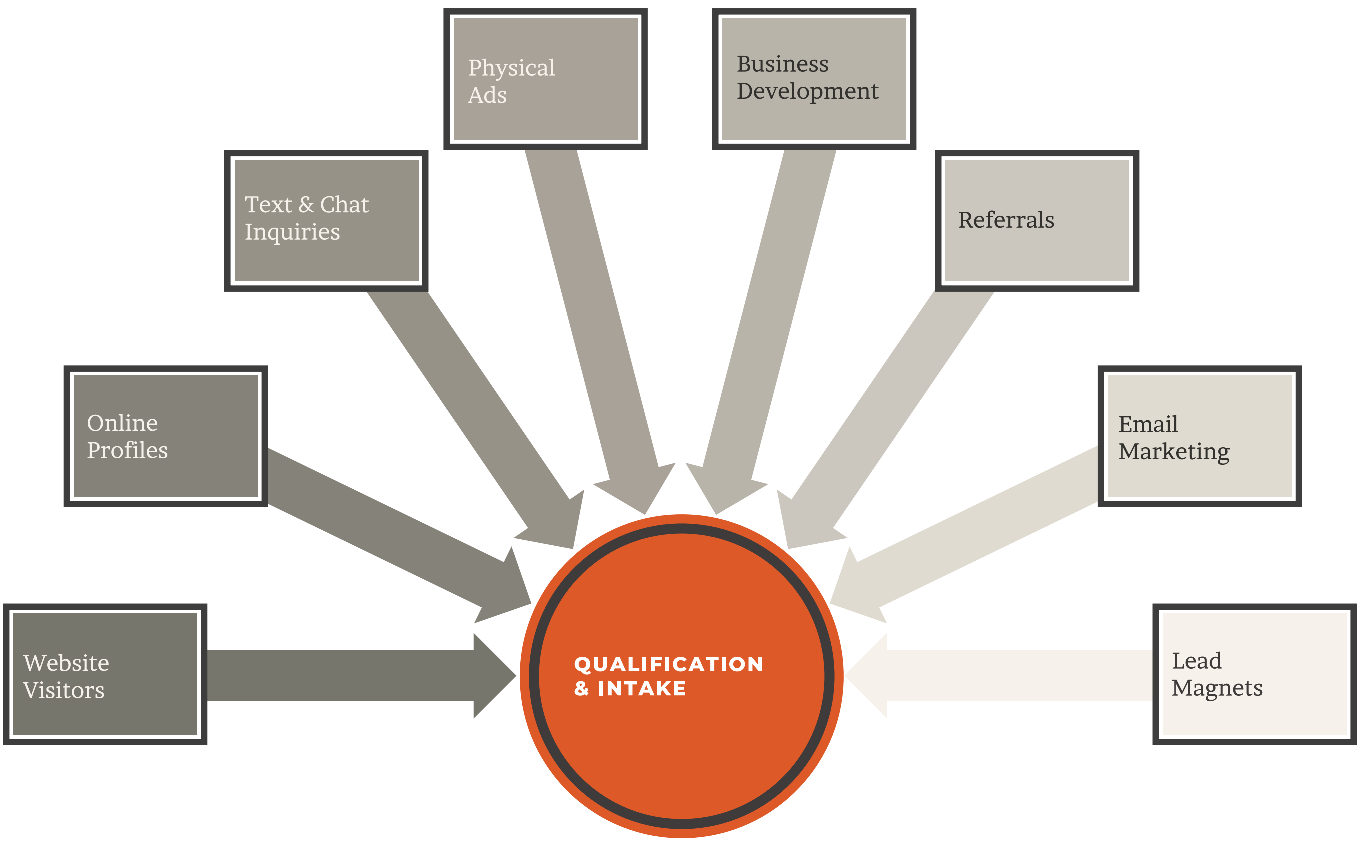
INSTRUCTIONS

Write down two investments you would make in your business or personal life if you experienced a meaningful increase in revenue.

REINVESTMENT AREA	BUSINESS/PERSONAL BENEFIT	COST
1		$
2		$

Law Firm Intake and Conversion Analysis

The intake process of a law firm will range from simple to complex. By documenting the process you currently have, it becomes easier to identify areas to streamline, automate, and outsource for long-term scalability.



INTAKE INVENTORY

GOAL

Identify all of the ways PNCs can contact your law firm.

INSTRUCTIONS

Write down a list of the phone numbers, email addresses, forms, and third-party listings through which you currently generate leads.

PHONE NUMBER(S):

Example: Main office number

EMAIL ADDRESS(ES):

Example: info@lawfirmname.com

FORM(S) WITH LOCATION:

Example: Contact us form on website home page

ONLINE PROFILE(S):

Examples: Google My Business, Facebook, LinkedIn, Avvo, lawyer referral directories

CURRENT INTAKE PROCESS

GOAL

Document how you are currently capturing and following up with PNCs.

INSTRUCTIONS

Building on the previous section of PNC sources, write down how (and how quickly) you currently respond to prospective new clients. Include the individual(s) responsible for responding on each channel.

SOURCE NAME*	CURRENT PROCESS

* *Examples: Main office phone, Facebook Messenger, general law firm email address*

Designing Your Ideal Intake Process

The intake process is a system that you will put into place and adapt over time. For solo practitioners, or newly started law firms, there may not be enough inbound inquiries to demand special software and you may begin with a semi-manual process.

For practices with a higher volume of inquiries, there might be additional steps in the intake process to vet or ‘qualify’ potential new clients before an in-person or phone appointment is scheduled.

In either scenario, a tremendous amount of room for error exists. No matter the law firm’s size, case volume, or hours of operation, it is easy for follow-up tasks to fall through the cracks.

In the following section, we will review examples of basic, intermediate, and advanced intake processes, each of which is suitable for law firms of all practice areas and sizes.

Simple Intake Process

A simple intake process consists of only a few steps. The use of a contact database, such as a CRM (Customer Relationship Management) or CMS (Case Management Software), ensures that no contact information is ever lost.

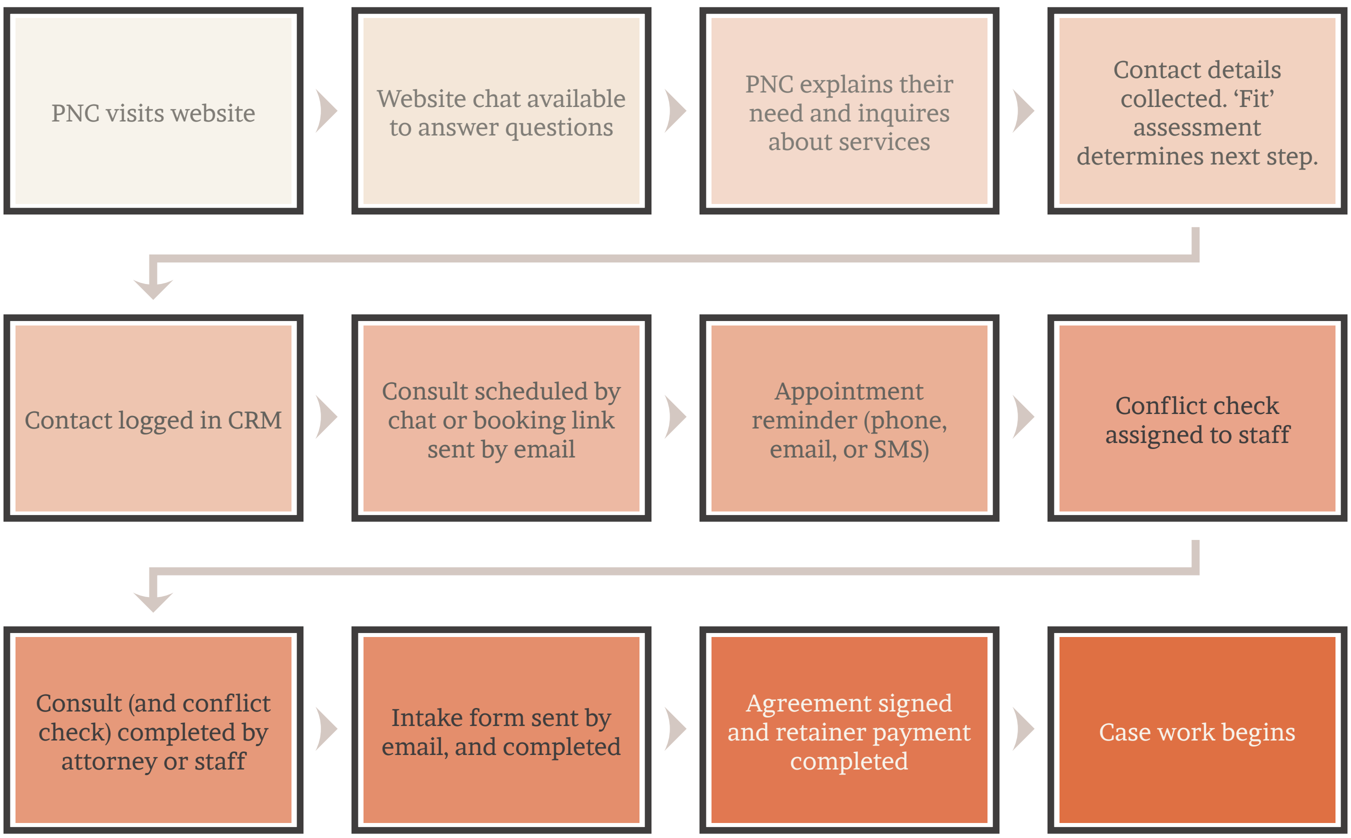
Website visitors enter a request for information

A record is created in your CRM or CMS

Once qualified, a case is created for the client

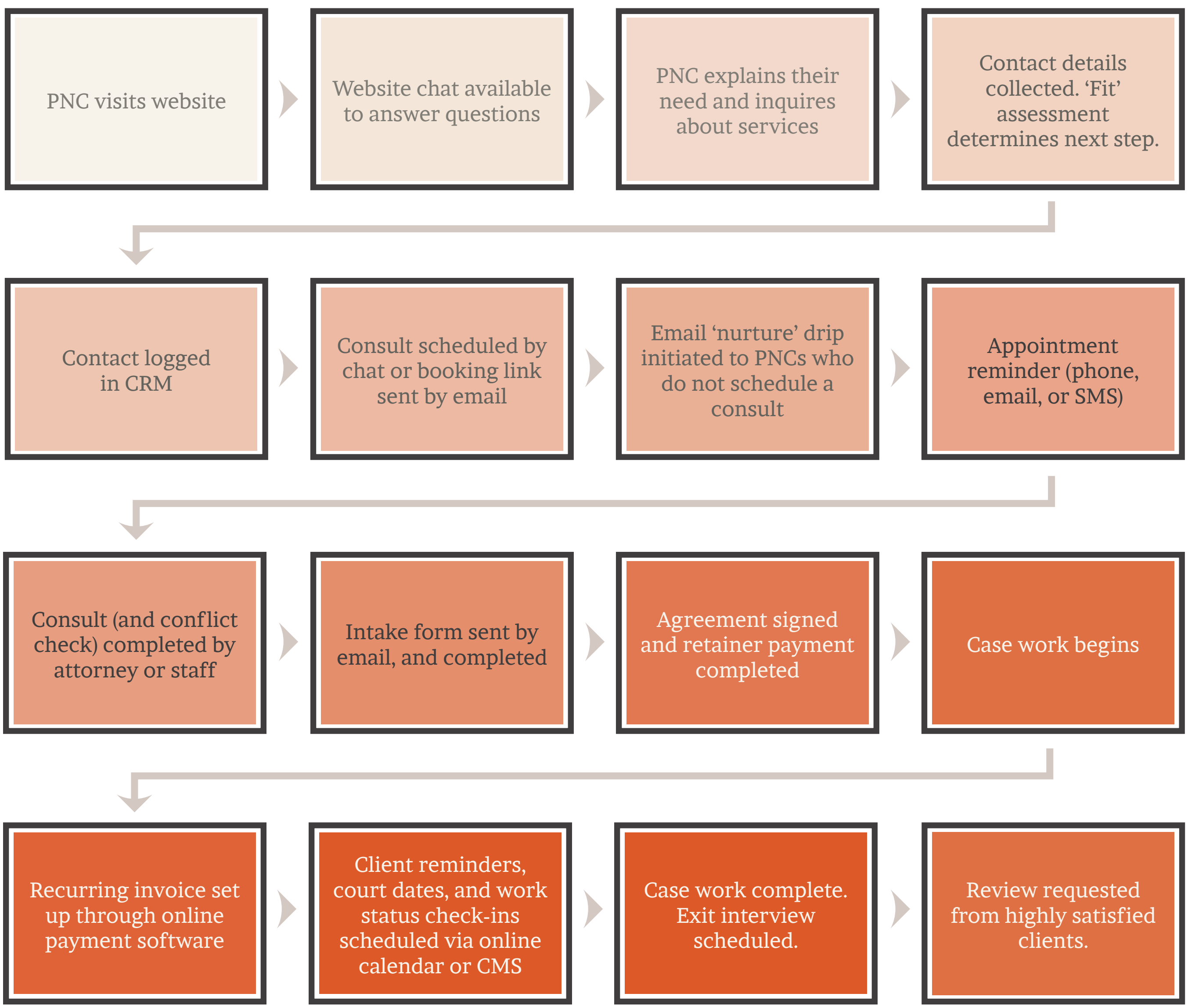
Intermediate Intake Process

At the next level, a series of systems and processes are combined to create a 'workflow' or 'automation' that takes a new contact through several steps, including communications sent by software and assigned human tasks.



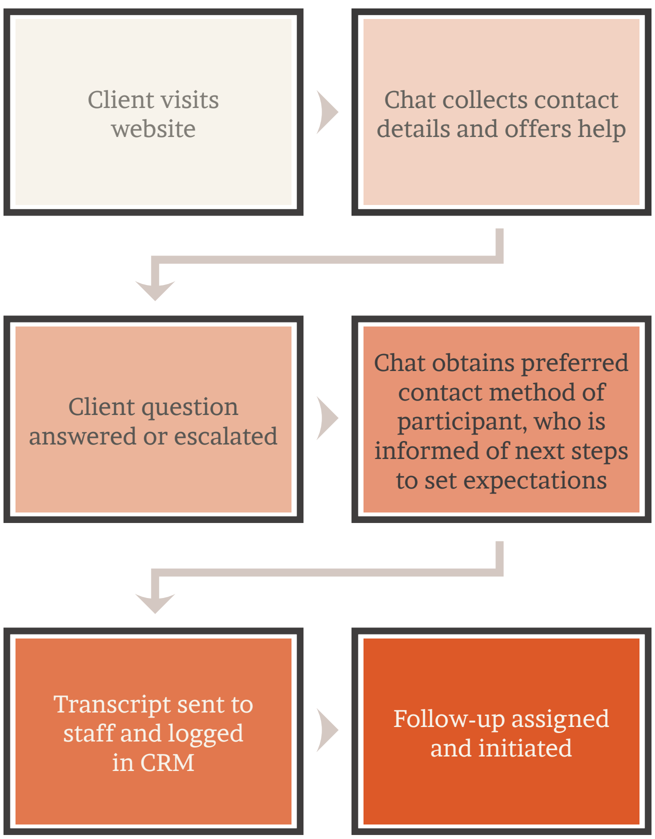
Advanced Intake: Potential New Client (PNC)

The marriage of live chat, website forms, automated communications, and human interactions with a contact make up an advanced workflow that is ideal for law firms that need to support a high volume of new leads. This advanced workflow can be used only during periods of rapid growth or every day, if volume remains consistently high.



Automated Communication for Clients with Chat Services

Live chat and chat bots help law firms respond promptly to clients around the clock. From single answers to full conversations, website chat can address common needs, triage follow-up communication, and escalate conversations to a phone call if needed.



STEP 1

Automating with Intake Forms

Whether potential new clients inquire about your services through your website, on third-party sites, or by phone, text, or email, it is essential data collection is standardized across all channels.

EXAMPLE

Intake Form

FORM SECTION	FIELDS
Contact details	Name, address, phone, email
Case details	Date of accident, court date, marital status, names of other parties involved
Financial details	Annual income, employment status
Payment preference	Credit card, cash, check, ACH, payment plan
Expected time to close (urgency)	Considering options, urgent, 2–3 months, 6 months, within 1 year
Case value	$_____________
Source	Google search, Facebook, individual, organization
Other	Police report, damage photos, doctor, insurance

EXERCISE

STEP 1

CREATE YOUR IDEAL INTAKE FORM

GOAL

Standardize data collection to consistently capture, qualify, and route PNCs.

INSTRUCTIONS

Within each section, add the information you need to collect to effectively and efficiently screen PNCs. An extra form is included on the next page to address the different data collection requirements of specific practice areas.

FORM SECTION	FIELDS
Contact details	
Case details	
Financial details	
Payment preference	
Expected time to close (urgency)	
Case value	
Source	
Other	

EXERCISE

STEP 1

CREATE YOUR IDEAL INTAKE FORM

GOAL

Standardize data collection to consistently capture, qualify, and route PNCs.

INSTRUCTIONS

Within each section, add the information you need to collect to effectively and efficiently screen PNCs for a second practice area.

FORM SECTION	FIELDS
Contact details	
Case details	
Financial details	
Payment preference	
Expected time to close (urgency)	
Case value	
Source	
Other	

STEP 2

Best Practices for Outsourced Scheduling

When automating your law firm's lead qualification and intake, one of most common drivers of success is maintaining an up-to-date calendar that is connected to online scheduling software. Armed with a shareable booking link and clear instructions for scheduling, you can outsource consultation bookings and call-back appointments to remote receptionists and chat agents. Here's how to ensure your staff and remote teams are not just effective and accurate, but also take as much scheduling work off of your plate.

Share Your Calendar & Availability

Outsourced teams work best when they are in sync with your schedule. By giving staff, virtual receptionists, and chat agents access to your calendar, and updating them whenever your availability changes, your calls and appointment bookings are guaranteed to be handled correctly. **Here are three steps to ensure a smooth-running delegated scheduling system:**

1 Immediately update teams upon changes to your availability

Most Smith.ai customers tell us they don't want another app to install, so, we let our clients update their availability via SMS. This system works well when you're delegating scheduling tasks to staff members internally, too. Text updates when you're unable to accept call transfers, when to contact your partner instead of you, when to bypass the receptionist and ring you directly, and more urgent directions, for in-the-moment call-handling changes.

2 Email upcoming changes to your availability

SMS updates work best if your status is changing *now* (you're busy for the next 4 hours), but, for future updates, email updates are preferable. For example, you may want to say, 'I'll be in court tomorrow after 1:00 pm, so don't try to transfer calls to me,' 'Tell my clients I'm on vacation next week,' or 'Reschedule all of my calls on Wednesday.'

3 Allow bookings for multiple appointment types

We schedule appointments for over 70% of Smith.ai clients using their own calendars. If a caller meets your criteria, we can get them on your calendar. But your staff or remote receptionists can go far beyond that capability, scheduling 15-minute 'call-backs' when transfers cannot be completed, current clients for court appearances, vendor check-ins on your managing partner's calendar, conference calls with multiple parties, and beyond.

STEP 2

HOW WILL YOU SHARE YOUR CALENDAR?

GOAL

Document how, when, and what types of appointments should be scheduled for you, your partners, and your staff.

INSTRUCTIONS

To streamline your new appointment-booking and client-scheduling processes, outline how you will share your calendar.

MEETING TYPE	PERSON (OR JOB TITLE)	TIMING
PNCs		
Current Clients		

STEP 3

Outlining Your Ideal Follow-Up Process for PNCs

The number of follow-ups, or touch points, with potential new clients may vary based on your practice area, the presence of competitive firms, current work volume, growth goals, and other factors. Typically, to convert a PNC, the law firm will need to have up to six contacts with a prospect before a decision is made to hire the law firm.

EXAMPLE

Potential New Client (PNC) Follow-Up Process

1. **Website Visit**
2. **Chat Bot or Live Chat Interaction**
3. **Appointment Confirmation** (SMS/Email)
4. **Appointment Reminder** (SMS/Email)
5. **Appointment**

6. **Retained**

6. **Not Retained**
Short-Term Nurturing (Calls, Emails)

7. **Long-Term Nurturing**
Newsletters & Surveys

PNC FOLLOW-UP PROCESS

GOAL

Standardize prospect follow-up and increase conversion

INSTRUCTIONS

If you do not currently have a standardized follow-up process in place for PNCs, complete the worksheet below with six to ten activities, including the communication channel, timing, and angle (value proposition). If you already have a process in place, document it below and identify three opportunities for increasing its effectiveness in converting leads to clients.

STEP	CHANNEL	TIMING	ANGLE/MESSAGE
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

The Impact of Website Chat on a Law Firm

When employing chat technology on your website, it is important to understand the impacts and opportunities that a chat program presents for your practice.

Understanding the differences between Live Chat and Chat Bots

Law firms of all sizes are employing chat services on their websites to both assist existing clients and capture, qualify, and convert new leads. There are different types of chat services available, but the key takeaway here is that for solo and small-firm attorneys, chat presents a competitive advantage, taking the burden of responsiveness off of your shoulders and onto fast and reliable chat bots and live agents.

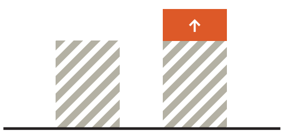
- A **Chat Bot** is an automated service that lives on your website. Powered by artificial intelligence, it can offer simple answers to common questions that have been programmed into the system, such as the location of the office, practice areas of the firm, process for setting up a consultation, and more. Chat bots get smarter over time thanks to interactive training with the firm's attorneys and staff.

- **Live Chat** is when messages initiated by a website visitor are addressed by a live person who has the ability to answer questions, carry out complete workflows (such as lead qualification and consult scheduling), and help existing clients obtain information or connect with staff or an attorney. Live Chat can be staffed by in-house teams or remotely by third-party vendors. Note the difference between using *scripted* chat agents vs. agents empowered to follow *guidelines*. The greatest return materializes with the latter, when agents complete as much 'work' as possible. This also provides a superior client experience.

- **Hybrid Chat** combines Live Chat and Chat Bots for the accuracy of an automated system with the sensitivity of a real person.

The Statistical Benefits of Live Chat on Businesses

In a world where we are constantly distracted, it is no surprise that most consumers prefer the option to get answers to their questions or book an appointment using a chat service. However, the extent to which website chat is the preferred communication tool is staggering. If you don't have web chat installed on your website, we strongly advise adding it to your short list of immediate 'to-do's.'



Law firms who use chat services see a **20–30%** increase in lead conversion

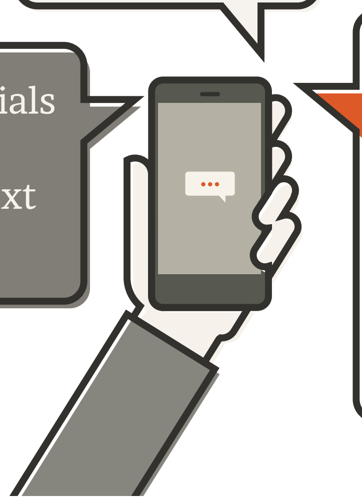
80% of Chat questions can be resolved within a single chat session

73% of Consumers prefer live chat over email or phone

Live chat is a communication channel that law firm leads and clients increasingly prefer for its convenience and ease. Text-based conversations like web chat are less intimidating and more discreet than phone calls, especially for PNCs with sensitive and private legal issues.

51% of customers prefer live chat for multitasking purposes

52% of Millennials would rather converse via text than voice



90% of customers said a "Live Chat" button gives them confidence that they can get help if they need it

THE STATISTICAL BENEFITS OF LIVE CHAT

GOAL

Improve lead conversion and client satisfaction with live chat and chat bots.

INSTRUCTIONS

Identify three to six opportunities to incorporate website chat into your communication with potential and current clients.

COMMUNICATION OPPORTUNITY	TARGET AUDIENCE: LEADS OR CLIENTS
1	
2	
3	
4	
5	
6	

Law Firm Marketing: Increasing the Number of PNCs You Receive Each Month

More inbound client inquiries don't always mean making more money. In fact, marketing that doesn't generate qualified leads does more harm than good: it's a waste of your time and energy, as well as the lead's.

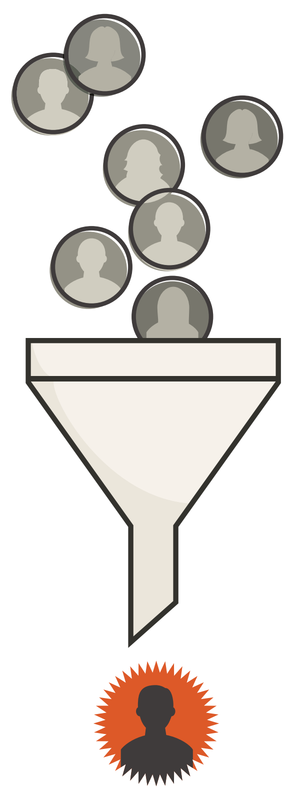
Here are a few of the most successful examples of marketing tactics and strategies that attract the most ideal clients to your firm.

Offer visitors worksheets and articles to help them assess and address their legal issue.
'Actionable content' worksheets, guides, forms that auto-complete legal documents they can self-file, and calculators that help them determine the extent of the impact or cost of their legal issue provide a service-first approach that builds trust and positive sentiment toward your firm.

- Eviction Worksheet
- Divorce or Marital Separation Form
- Personal Injury Severity Quiz
- Traffic Ticket Estimator Form

Data from forms and calculators also empowers you to follow up in a timely and highly accurate manner. For example, a PNC who completes an eviction notice form on your website tells you how many days they will be giving their tenant to evacuate the premises, so you know exactly the right time to check in and ask how they're faring, and if they could use help from your law firm at this time.

Confirm the PNC is a good fit and serious about hiring your law firm.
- Charge for consultations, but optionally credit the consultation fee back to the PNC if they retain your firm, so it is not seen as an extra cost or hindrance to serious leads.
- Institute a cancellation fee for all appointments by requiring a credit card to complete booking.
- Add mandatory filtering questions to your contact form that prevent a submission if a fitting answer is not chosen. For example, 'Select the type of legal issue you need help with: 1) Family law, 2) Social security disability law.' If a lead cannot select one of those two options, they have a need outside of your practice areas, and will not be able to submit the form, saving you from the follow-up work of notifying them that your firm does not work on these matters.



INBOUND MARKETING APPROACHES

GOAL

Identify marketing programs and tactics that will generate more serious and qualified leads who make contact with your law firm.

INSTRUCTIONS

Brainstorm marketing ideas that will help you identify high-quality PNCs.

DESCRIPTION OF NEW OR REVISED MARKETING ACTIVITY OR PROGRAM	IMPACT RATING (LOW, MEDIUM, HIGH)
1	
2	
3	
4	
5	
6	

How to Outsource Follow-Up to Inbound PNCs

For law firms that employ great marketing filters like those discussed on the previous pages, outbound phone calls can be made to prospects by virtual receptionists. Examine the process below to understand how outbound calls to PNCs can reduce response times and increase revenue.

1

PNC completes marketing form on website

Email alert with completed web form details is generated to law firm

2

Email is sent to receptionist service based on automatic forwarding rule

Receptionist calls PNC to qualify; schedules 'good' leads and refers 'bad' leads

3

Scheduled appointments and conflict checks are completed by attorneys and staff

PNC retains the firm immediately, or is added to lead-nurturing program for follow-up and conversion

Smith.ai's Law Firm Communication Library

Our Communication Library is a supplemental resource to this Law Firm Communication Playbook.

The library includes templates and guidance built on our experience handling nearly one million calls, chats, and other communications. It is tailored to law firms employing the following communication methods:

- Phone
- Email
- Website Chat
- Text Messages

The library contains a multitude of inbound and outbound communication scenarios faced by law firm owners, in-house staff, and outsourced teams like virtual receptionists. Scenarios include but are not limited to:

- Caller information collection
- PNC qualification
- Appointment scheduling
- Intake form completion
- Website form follow-up
- Post-consultation follow-up
- New client welcome email
- Unqualified PNC referral email
- Legal disclaimer for website chat
- Common FAQ for website chat

Review these best practices, and then adapt them to suit the specific needs of your law practice.

Access Smith.ai's Communication Library:
smith.ai/law-firm-communication-library

MADDY MARTIN

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Maddy Martin is the head of growth and education at Smith.ai, which provides small-business communication services, including their virtual receptionist and intake service, web chat, and Keypad cloud phone system. The vast majority of Smith.ai clients are solo and small-firm attorneys.

Over the last decade, Maddy has grown startups from New York to Silicon Valley, building her expertise and reputation in small-business communications, lead conversion, email marketing, event marketing, co-marketing, partnerships, and SEO (both technical and editorial content marketing). Recognized for her expertise as a female leader in the modern world of marketing and communications, and winner of multiple awards for her work, Maddy discovered she not only enjoys working in marketing and communications, she also enjoys teaching marketing and communications concepts and practices to empower small-business owners.

Over the last few years, Maddy has focused her attention on helping solo and small-firm attorneys. Her direct communications with these lawyers revealed that there is a common struggle among them. Their time is spread dangerously thin between the work of practicing law and running a business. She recognized the need they all have, to filter distractions, and knew she could help. Maddy recently authored and published an eBook titled, "Are you Laboring or Lawyering? 7 Steps to Reduce Interruptions and Chores and Run a Highly Productive Law Firm with Virtual Receptionists," in which she addresses the tribulations faced each day by small and solo firms.

Though fairly new to the legal field, Maddy is widely recognized as a small-business marketing and communications expert, and she is quickly making a name for herself in the world of law practice management, small-firm growth, and legal technology. She not only understands that law firms are businesses, but she also understands the scrutiny and daily pressures attorneys face as they wrestle to best serve their clients' needs, while being responsive to new leads. Over the course of the past two years, she has been invited to present over 40 CLE-accredited presentations, ranging from webinars to in-person events, for bar associations, online education providers, and private companies. She not only shares advice and real-world case studies, but also prioritizes delivering actual tools and actionable steps that attorneys can take back to their offices and apply immediately. Moreover, she is careful to tailor presentations to a wide range of skill and experience levels, as well as to diverse practice areas, so beginners and experts alike come away with significant value.

In addition to her BA in Economics from Hamilton College, Maddy also has a culinary degree from the Institute of Culinary Education. In her free time, she enjoys preparing delicious meals for her family and friends, international travel, rock climbing, and skiing.

Notes

REAL RECEPTIONISTS +
MACHINE INTELLIGENCE

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