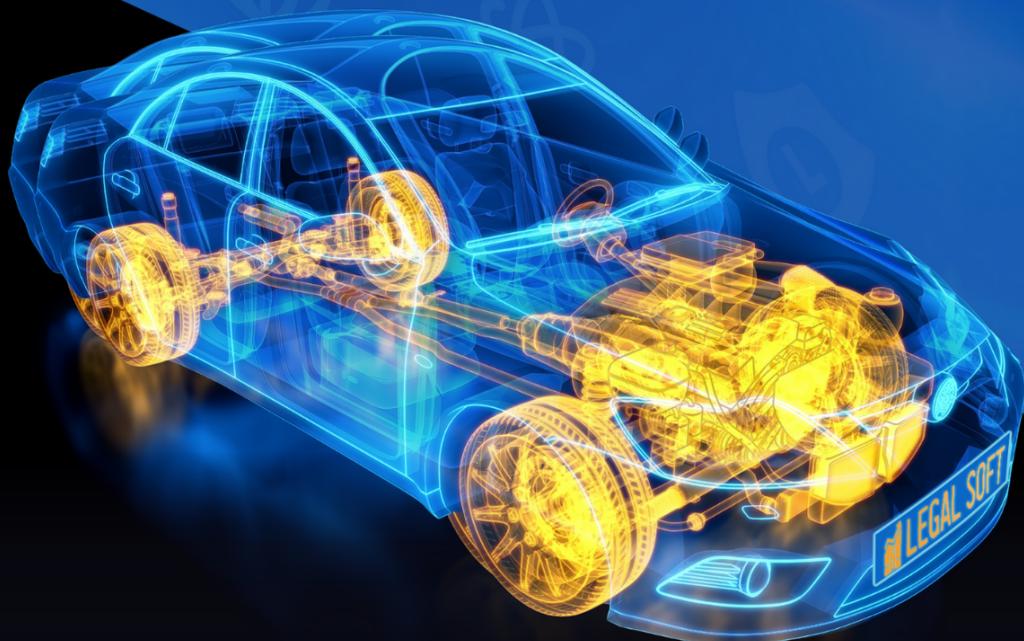


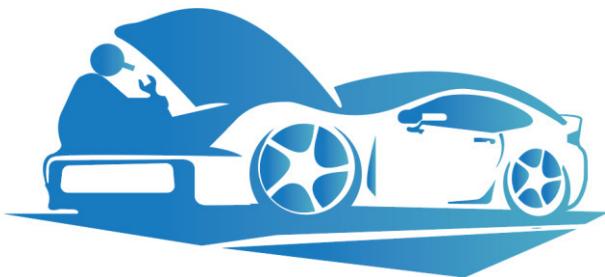
# HOW TO TUNE UP YOUR LAW PRACTICE



IN THE COURT OF LAW, PRECISION IS KEY;  
IN MANAGING A LAW FIRM, TUNING IS KING.

# How to Tune-up Your Law Practice

By Hamid Kohan



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This publication contains the opinions and ideas of its author(s) and is designed to provide useful advice in regard to the subject matter covered.

## Contents

Dedication.....	iv
Chapter 1: The Engine.....	1
Chapter 2: The Brakes.....	9
Chapter 3: The Paint Job .....	12
Chapter 4: Fuel.....	16
Chapter 5: Mechanic.....	19
Chapter 6: Chauffeur.....	21
Chapter 7: AI Technology for Your Law Practice.....	22
Chapter 8: Repair & Maintenance .....	26
Chapter 9: Other Cars in Competition.....	30
About The author.....	33

## Dedication

With deep appreciation and respect, this book is dedicated to the Legal Soft team and my initial clients; Tofer & Associates, Ashoori Law, Sam Mollaie, Quill & Arrow, and Miracle Mile Law. Your expertise and collaboration have been instrumental in shaping this work..

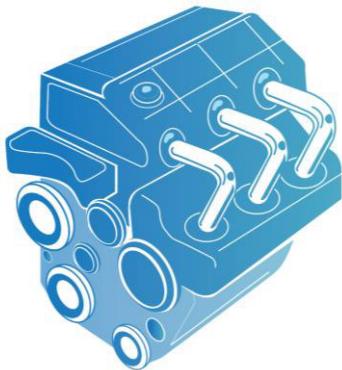
Thank you,

Hamid Kohan

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# Chapter 1

## The Engine



Ding, ding, ding. It has been months or years since you bought your car, you have driven it hundreds if not thousands of miles, and suddenly your engine light comes on. You take it to the mechanic, and you're told that your car needs a tune-up and cannot be driven until this is done. Like cars, law firms also get the occasional "check engine" light when the firm's progress seems to have come to a halt, or there is a noticeable lack of scaling. While there is no mechanic or repair shop for law firms, I have tuned up quite a number of law firms over the past decade and have constructed a valuable checklist to ensure consistent growth.

The first thing I do is look at the crux of the issue, what I will call the law firm's engine. The law firm's engine will consist of the Case Management System (CSM) since this is the

basic building block for developing and scaling a law firm in today's day and age. First, how updated is the CSM, and does it support a client-facing solution? If your CSM is up to date, does it have the necessary features to integrate with third-party service providers and other SW solutions? Now, given that your CSM will allow you to keep up to date with your cases and clients, we need to make sure that its integration includes automatic client follow-up features, including but not limited to texts, emails, phone calls, and forms, and letters that automate the pre-litigation process.

Next, we look at the case calendaring and ensure it includes the following:

- Proper Scheduling
- Reminders
- 3rd party notifications
- Client History tracking

In addition to tracking cases, in order to maximize case settlements, attorneys must also manage and track treatments, including tracking;

- Connection to medical providers
- Automated provider search
- Reminders and follow with the client
- Reminders and follow up with providers
- Realtime treatment updates
- Records collection

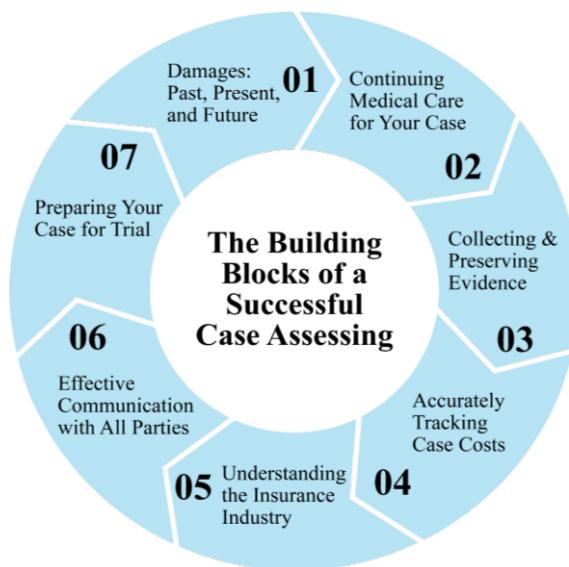
- Bill collection and calculations

## **The Main Features of Case Management Software**



Once you've tracked **how** you can maximize the value of your case, you can then use the specific intake facts to estimate your cost and the value of your case. The value of your case builds the more you work hand-in-hand with your client. By tracking your client's management and updating all involved parties as to the status of the case, not only can you add value to the case settlement, but the reviews and referrals from that satisfied client will surely allow you to bear the fruit of taking a few extra steps.

## The Building Blocks of a Successful Case Assessing



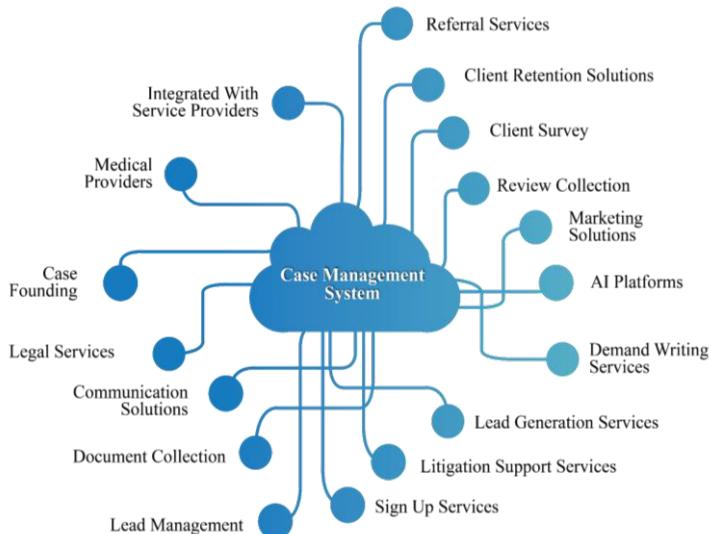
On the topic of keeping your “engine” running, an integral part of scaling your law firm includes being integrated with

service providers. No lawyer was ever able to succeed with a properly scaled firm unless they had beneficial relationships with medical providers, lead management companies, litigation support services, and lead generation companies.

I have included an exhaustive list of service providers that a successful law firm must have relationships with.

- Integrated with Service Providers
- Medical Providers
- Case Funding
- Legal Services
- Communication solutions
- Document Collection
- Lead Management
- Sign up services
- Litigation support services
- Lead generation services
- Demand Writing Services
- AI platforms
- Marketing Solutions
- Review Collection
- Client Survey
- Client retention solutions
- Referral Services

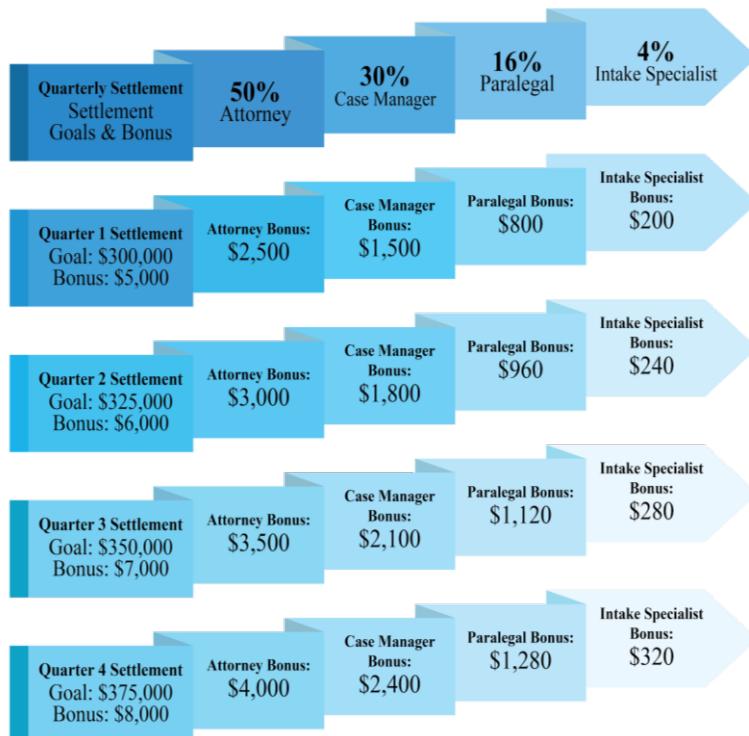
## Connecting the Dots: Integration Considerations for Case Management Software



Like any working engine which requires upkeep and maintenance, such as consistent oil checks and consistent servicing, your law firm's "maintenance" comes from your staff. Just like how you can't expect your engine to run properly if you're not maintaining your vehicle, you can't expect your law firm to run if you're not maintaining your staff. All members of your staff, from claim managers, paralegals, associates, and attorneys, must have proper caseload management. My rule of thumb is simple, yet often forgotten. Keep your good staff happy and terminate unproductive staff. You are not doing them a favor by keeping them around. To

ensure your staff is meeting expectations, you need to lay out the groundwork for them. This includes having specific job descriptions, annual performance reviews, growth and education plans, teamwork exercises, and incentive programs.

## Example Incentive Plan for Law Firm Employees (Revenue Based)



A successful law firm will ensure that these statistics are tracked;

- Average settlement \$ per staff
- Average time spent on a case
- Average cost per Pre-lit cases
- Average cost per Litigation cases
- The average age of cases in Pre-lit
- The average age of cases in Litigation

Additionally, make sure you are structuring weekly case reviews with Sr. Attorneys to build the value of cases, prevent roadblocks, and increase client satisfaction.

That can include discussing:

- Top 10 Active Cases
- Problem Cases
- Problem Clients
- Possible clients to refer out
- Case Review
- Candidates the firm should drop

Once you have properly integrated your firm with service providers, tracked your staff's work and success, and updated your clientele with their case status, the "crux" of your firm or your engine will be in good shape to allow you to put tons of mileage on your vehicle aka, your firm.

## Chapter 2

# The Brakes



Now that our check engine light is off and your car is running properly, it's time to turn to the part of your car that lets you start your vehicle and get off the ground, your brakes. In the context of your law firm, your brakes are your lead generation sources, and without them, you'll be neutral for the foreseeable future.

Lead generation sources are the difference maker between the firms that have made it and those that are just comfortable. To ensure that you are maximizing your lead generation sources, you should be tracking every single lead that comes in, first and foremost, that includes cases generated from former clients, service providers, other firms, and staff. Next, you want to know the percentage of cases coming from your advertising, and that includes; social media, your website, SEO, email campaigns, and print marketing.

Now it's not enough to just track this information! You also need to calculate your cost per case acquisition, also referred to as your CCA, FOR EACH AND EVERY LEAD SOURCE. Doing so will show you exactly where you should

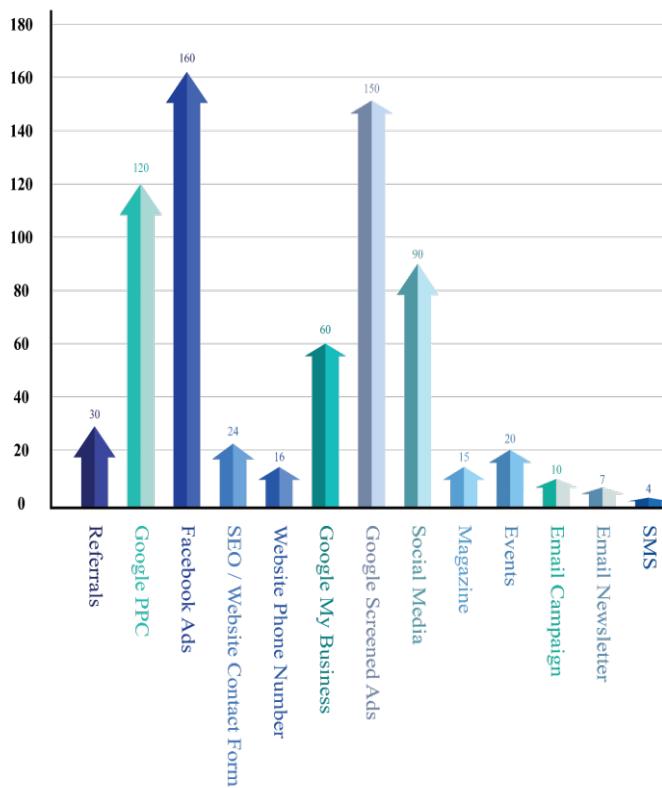


put your time and money and where you are wasting such resources.

- **Gather & Track Leads from:**
  - Current client list
  - Referral sources
  - Attorney Referral networks

- Website
- Social Media
- 3rd party providers
- PPC Campaigns
- Display ads
- Media (TV, Radio, Print)

## Example Law Firm Case Retention per Source (Annual Report)



## Chapter 3

### The Paint Job



While everyone knows a vehicle is of no use if the engine and brakes are not working, the reality is even with the internal part of your car up to standards. Nobody wants to drive a car that is not "presentable." For your car, this may include a period wash, a nice paint job, and removing dings. For your firm, this is the image of your practice to the outside world; your social media presence, video testimonials, and public forum reviews.

This is the fun part of building your firm, as there is no one shoe fits all! This all comes down to your personality, your goals, and your vision for the firm. Ask yourself, what's your firm's, and why should someone choose you over the hundreds of other firms in their vicinity? Since there is no bright line rule to follow for marketing, I have listed a few of the methods that I have seen work, and you can choose which represents your firm the best.

- Community Involvement
- Speaking at high schools and college campuses.
- Charity Involvement
- E.g., Food shelters, Hospice homes, Cancer Walks, etc.

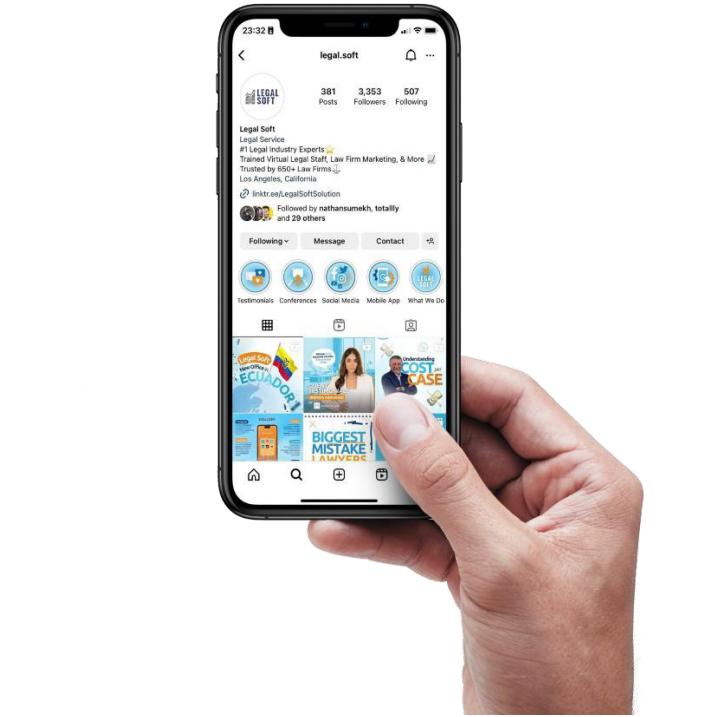
In addition to being involved in your community, you MUST have an online presence that lets others know of your firm's services. That can include having a call-to-action element on your website, adding a chat feature, utilizing intake forms, consistently posting on social media, and so forth.

## Strong Social Media Presence: Top Benefits You Can't Ignore



One method that I have seen work tremendously for law firms around the country is creating an in-house team of content creators. That team will be in charge of letting the community know about your firm's presence and involvement, and posting practice area-specific videos filmed by the attorney, giving insight and advice to potential clientele.

## Effective Online Presence Management is Vital for Practice Success



## Chapter 4

### Fuel



Now that your car is running and presentable to drive, you need to make sure you have gas or, in the following year, a charging port. Although

it depends on what state you're living in and what kind of gas your car takes, gas prices fluctuate, and nobody wants to pay \$10.00 a gallon. Just like nobody wants to pay \$10.00 a gallon, no attorney wants to pay over-market for a case, staff, or management. This is where budgeting and incentives come to the forefront.

Believe it or not, there is a cost-based industry standard for staff, attorneys, marketing, and lead generation, and a scaling law firm should not be in the business of aimlessly spending money without having as close to a guarantee as possible that they will have a return on their investment. Law firms can do this by implementing incentives for their staff based on meeting targets for case sign-ups, settlement values,

and client satisfaction. This allows for the ultimate win-win situation in which your staff is being monetarily incentivized to excel in their work and bettering your firm.

In the same way, you are thinking about the future when you're filling your tank. You should also be planning the future of your law firm!

- **This may include:**

- Your Practice Area for the next 2-3 years of expansion
- Your Practice expansion out of your physical area
- Partnerships with other local Practices
- Partnership with practices out of state
- Acquisition of retiring practices
- Acquisitions of other Solo Practitioners
- Partnerships with other service providers
- Utilize the automated Referral Management system 411 Referrals to track and get paid on all referrals.
- Law practice incubation program
- UBE Attorney Expansion plan

A car with no radio system, AC, or navigation is outdated and undoubtedly a recipe for disaster. Similarly, a law firm that has not implemented technology into its firm is falling behind the curve and may find it very difficult to scale.

That technology can include updated:

- Case Management Solutions
- Communication System
- Tracking System
- Website Analytics
- Chat System
- Mobile Apps
- Lead Management
- Automated Follow-Up System
- Automated Client Surveys
- Due Date Tracking System
- Electronic signature capturing, document management, and tracking
- ai integration
- Review Collections

## Chapter 5

# Mechanic



When you decide

it's finally time to check  
the engine light, your  
brakes, your paint job, and  
your fuel tank, you may

visit a mechanic or an engine specialist, or you may just ask your uncle Vinny if he can take a look. Either way, the point is you have options. On that same note, you have options for how you tune up your practice as well. You can choose to have your intake be virtual while your admin is in-house. You may choose to have your case managers virtual and your social media team in-house or any combination of in-house, virtual, and call center. Make sure you shop around and see what fits your law firm best, and don't fear making the wrong choice since the only wrong choice is going with your first option and sticking with them regardless of their efficiency!

What good is a car that has a running engine, new brakes, and a fresh paint job but a horrendous and messy interior? Would you get in a car with food on the seats, bad

odor, and no seatbelt? Of course not! Similarly, nobody wants to get in the car (work with) a firm that is not genuine, hospitable, and transparent. That means you must go above and beyond or, in many cases, do the bare minimum to be as inviting and helpful as possible. That may include sending monthly surveys to your clients, one after intake, one during treatment, and one once the settlement is reached. This will help your firm reduce bad reviews, increase referrals, and create a culture of generosity. Additionally, I've seen firms benefit immensely from sending welcome packages to clients after they sign up, as well as small gifts of congratulations after the settlement is reached. Once you've followed these steps, clients will be more than happy to make video testimonials for your firm, exclaiming from the mountain tops your excellence.



## Chapter 6

# Chauffeur



As we're getting ready to get behind the wheel and hit the streets, it's understandable if you've become "too tired to drive." This is where it would be nice to have a chauffeur, and I'm here to tell you that in 2023, everyone can have one. While 30 years ago, it may have been unrealistic to outsource all of the maintenance listed above, that is no longer the case.

With the change in culture regarding working from home and expanding staff internationally, Virtual Assistants are the new wave of maximizing your law firm's efficiency. Virtual Assistants are staff you can hire from across the globe who can help your practice expand to different states and new practice areas and target diverse populations.

Virtual Assistants can aid your law firm in discovery, demand writing, lien reduction, and marketing at a fraction of the cost.

## Chapter 7

# AI Technology for Your Law Practice

AI technology has transformed plaintiff law practice, revolutionizing various aspects of the legal profession. By leveraging the power of AI algorithms and machine learning, plaintiff lawyers can enhance their effectiveness, efficiency, and decision-making capabilities. Let's delve deeper into the impact and implementation of AI technology in plaintiff law practice:

### **Case Screening and Evaluation:**

AI algorithms can analyze extensive volumes of legal data, including case law, statutes, regulations, and legal opinions, to evaluate the viability of potential plaintiff cases. AI tools can help lawyers make data-driven decisions on whether to pursue a case and estimate the likelihood of success by assessing past case outcomes and identifying relevant legal precedents. This enables lawyers to allocate their resources effectively and focus on cases with the highest chances of favorable outcomes.

## **Legal Research and Discovery:**

AI-powered tools significantly streamline the process of legal research and discovery. With the ability to process and analyze vast amounts of information in a fraction of the time it would take a human researcher, AI algorithms can quickly identify relevant case law, statutes, and legal commentary. This expedites the identification of legal arguments, strengthens the foundation of legal claims, and enables lawyers to construct persuasive arguments based on comprehensive research.

## **Document Analysis and Review:**

Plaintiff cases often involve many documents, including medical records, contracts, insurance policies, and correspondence. AI technology can assist lawyers in analyzing and reviewing these documents more efficiently. AI algorithms can extract key information, identify patterns, and flag potential issues, saving lawyers valuable time and minimizing the risk of overlooking critical details. Additionally, AI-powered tools can assist in organizing and categorizing documents, facilitating easy retrieval and reference during case preparation.

## **Personalized Case Strategy:**

AI can provide valuable insights and recommendations to develop personalized case strategies. By analyzing data from past cases, including case outcomes, legal arguments, and

settlement amounts, AI algorithms can identify patterns and correlations. This information helps lawyers assess the strengths and weaknesses of their cases, estimate damages, evaluate settlement options, and provide informed advice to their clients. Ultimately, AI technology augments the lawyer's expertise, enabling them to make well-informed decisions and develop effective legal strategies.

### **Predictive Analytics:**

One of the most significant benefits of AI technology in plaintiff law practice is its ability to offer predictive analytics. By analyzing historical case data, AI algorithms can forecast case outcomes, estimate potential settlement amounts, and assess the likelihood of success in different scenarios. This information empowers lawyers to provide clients with more accurate assessments of their cases, enabling them to make informed decisions about settlement negotiations, trial strategies, and potential risks involved.

### **Client Communication and Support:**

AI-powered chatbots and virtual assistants have become valuable tools for plaintiff lawyers to improve client communication and support. These tools can interact with clients, answer frequently asked questions, provide basic legal information, and guide clients through the legal process. Chatbots and virtual assistants offer round-the-clock support,

ensuring that clients have access to information and assistance whenever they need it. This technology enhances client satisfaction, reduces the lawyer's workload for routine inquiries, and allows lawyers to focus on more complex legal tasks.

### **Data Security and Privacy:**

AI technology also plays a critical role in ensuring data security and privacy in plaintiff law practice. With the increasing digitization of legal documents and the sensitivity of client information, protecting data from unauthorized access and breaches is paramount. AI algorithms can detect potential security breaches, identify vulnerabilities in data systems, and assist in preventing unauthorized access to sensitive legal information. Furthermore, AI tools can aid in complying with data privacy regulations by automatically identifying and redacting personally identifiable information (PII) from documents, minimizing the risk of inadvertent disclosure.

## Chapter 8

# Repair & Maintenance

Your car's smooth functioning doesn't simply occur out of the blue; it requires regular check-ups, maintenance, and, sometimes, repairs. In the same vein, the optimal functioning of a law firm is contingent upon persistent inspection, maintenance, and corrections as needed. From staying up-to-date with the latest legal updates to smart budgeting and investments, all play an essential role in the overall health and productivity of your law practice. This chapter aims to highlight the importance of diligent check and balance in your law firm.

### **Understanding the Importance of Maintenance in a Law Firm**

Just as you take your car for regular tune-ups to keep it running smoothly, your law firm also requires periodic checks to ensure it functions at its highest potential. Whether it's keeping tabs on the latest amendments in the law, technological upgrades, or routine financial auditing, each aspect plays a vital role in ensuring the firm's successful operation.

**Staying Current with Legal Updates:** For a lawyer, keeping up-to-date with the latest developments and changes in law is of paramount importance. Many jurisdictions demand lawyers complete their Continuing Legal Education (CLE) credits to maintain their licenses for practicing law. Staying abreast of the latest legal precedents, amendments, and rulings can provide a competitive edge, enabling more effective client representation.

**Technological Upgrades:** In the contemporary age, technology is interwoven into every aspect of our lives, including the legal profession. From legal research tools to practice management software, the effective use of technology can significantly enhance a law firm's productivity and client service. Regularly updating these tools and training your team to utilize them optimally is crucial for the firm's growth and success.

**Practice Management:** Efficient practice management is crucial to a law firm's smooth operation. This includes regular performance reviews, feedback sessions, and internal audits. Periodic assessment of the team's performance helps in identifying the areas that require improvement and can lead to better resource allocation.

## **Balancing Finances and Smart Investments**

When starting a law firm, it might be tempting to minimize expenditure wherever possible. However, some costs represent important investments in the firm's future. These include but are not limited to quality legal research tools, professional development opportunities for your team, and robust cybersecurity measures.

Smart budgeting does not necessarily mean cutting corners but instead making judicious decisions about where to invest the firm's resources for long-term benefits. Here are some areas that require particular attention:

**Legal Research Tools:** Comprehensive legal databases are critical tools for lawyers, assisting in research, case preparation, and staying updated with the latest case law and legislation. Investing in high-quality research tools can lead to more effective representation and successful outcomes for clients.

**Team Development:** Continuous learning is a crucial aspect of legal practice. Regular training sessions, seminars, and workshops can help your team stay current with legal updates and technological advancements and enhance their professional skills. These investments can lead to improved productivity and a more competitive law firm.

**Cybersecurity Measures:** In the digital age, the importance of cybersecurity cannot be overstated. Law firms deal with sensitive client information daily, and a security breach could be disastrous. Investing in robust cybersecurity measures, such as secure servers, encrypted communication, and regular security audits, is a non-negotiable aspect of law firm management.

## **Conclusion**

In the face of volatility and change, routine checks and balances in your law firm serve the same purpose as regular maintenance for your car - ensuring smooth, trouble-free operation. From staying updated with the latest in law and technology to making smart, long-term investments, each aspect contributes to a more productive and competitive law firm. By treating your law firm like a well-oiled machine, you can navigate the ups and downs of the legal landscape.

## Chapter 9

# Other Cars in Competition

We arrive at the close of our journey with an essential acknowledgment: the road is rarely a solitary place. Our gleaming new car, despite its charm, is only one among many marvels on the highway. Picture the legal market as a bustling thoroughfare, teeming with high-performance vehicles, each of them catching the public's eye with their unique appeal.

Now, envision your law firm as your distinctive automobile in this traffic of legal services. Your brand, synonymous with your firm's ethos, its commitment, and the reliability of its services, defines how the public perceives you. Like a luxury car's distinct signature, a robust brand propels your firm into a class of its own, setting you apart in the legal marketplace.

In today's fiercely competitive legal industry, standing out is paramount. A powerful brand paired with a targeted marketing strategy can make your firm as noticeable as a classic car among family sedans. While traditional marketing through newspapers, television, and billboards has its merits, the significance of digital marketing in our increasingly interconnected world cannot be understated.

However, amid the cacophony of ads and campaigns, an age-old method of promotion remains unmatched - client recommendations. The personal testimony of a satisfied client can outshine even the most glossy and high-budget marketing efforts. Hence, it's crucial to ensure that every client's experience with your firm is exemplary, as they will become ambassadors for your brand, sharing their experience with their network.

A robust online presence complements your physical one in this digital age. Think of your law firm's website as a virtual headquarters, accessible at all hours to potential clients. It's a hub where visitors can delve into the services you offer, meet your team digitally, peruse client testimonials, and reach out for assistance. Leveraging the digital space extends your firm's influence beyond geographical limitations, inviting opportunities previously out of reach.

In summary, creating a strong brand and maintaining an impactful online presence is instrumental to your law firm's visibility. They allow you to carve a distinct space in the minds of potential clients and lay the groundwork for trust and recognition.

As we conclude, remember that the road will always be bustling with other vehicles—your competitors. It's the power of your brand, your client-oriented approach, and your distinct

journey that distinguishes you from the rest. Regardless of whether you're just launching your law firm or are a seasoned practitioner, this realization can guide you toward sustained success.

In closing, no matter how many other cars vie for attention, your law firm's unique journey, fueled by its distinctive brand, will always capture admiration. Understanding this is the key to ensuring your firm is more than just another vehicle on the highway; it becomes an indelible presence that resonates with potential clients, making a lasting impression.

## About The author

**Hamid Kohan** is a force to be reckoned with in technology and innovation. A veritable Silicon Valley veteran, Kohan has consistently proven himself as a trailblazer, turning bold ideas into tangible realities that have left an indelible mark on the industry. Throughout his illustrious career, he has held several leadership roles, including a successful tenure as the president of a publicly traded company. His wealth of experience and relentless pursuit of innovation have led him to his current role as a pioneering tech entrepreneur, focusing on revolutionizing the medical and legal industries.

Driven to make a tangible difference in the world, Kohan has founded multiple companies within the legal and medical sectors, including Legal Soft, a law firm growth company currently serving over 650 law firms, helping firms scale and expand through innovative marketing and staffing services. His unyielding passion for innovation has led him to explore the myriad possibilities offered by artificial intelligence (AI), which he believes holds the key to transforming these industries. With his extensive leadership experience and keen understanding of technology's potential, Kohan is set to usher in a new era of progress in both fields.

Additionally, Kohan founded Lien Networks, a tech company focused on bridging the gap between lawyers and doctors working on liens, allowing them to refer cases and manage the client journey through an innovative platform. Aside from Kohan's involvement in the tech space, he is also the foundation of his law firm, Magic Law Group. Magic Law Group is a premiere nationwide law firm that serves clients from all 50 states, specializing in personal injury, lemon law, employment, and immigration practice areas.

One of Kohan's core beliefs is that AI can bridge the gap between the wealth of information available and the speed at which professionals in the medical and legal fields must make critical decisions. By applying advanced machine learning techniques and developing intelligent algorithms, his companies are already making strides in diagnosing complex medical conditions, expediting legal research, and uncovering insights that would otherwise remain hidden within vast data sets.

Not one to rest on his laurels, Kohan also serves as an active mentor and advisor to a new generation of entrepreneurs, sharing his knowledge, experience, and passion for innovation. He firmly believes in the power of collaboration and the importance of fostering a supportive ecosystem to nurture the next wave of groundbreaking

ideas. As he continues to break new ground and challenge the status quo, there is no doubt that his work will have a lasting impact on the world around us, improving the lives of millions. With his unparalleled vision and relentless drive for innovation, Hamid Kohan inspires all those who aspire to make a difference through the power of technology.

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