

UNIVERSITY OF FLORIDA COLLEGE OF LAW

Law Practice Management and Technology Course #6752

Syllabus

Spring 2018
Room 382
Wednesdays, 4:00-5:40 p.m.
Two (2) Credit Hours

Office Hours:
Room 382
Wednesday 3:30-4:00 p.m., or by appointment

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COURSE DESCRIPTION & STUDENT LEARNING OUTCOMES

The legal profession is rapidly changing, whether lawyers are ready or not. Innovative business structures and the consistent introduction of new technologies are changing the ways clients expect to be served. Today's client base is an educated market which expects communication and efficiencies unlike past generations have seen in this profession.

Also, more law school graduates are jumping into the practical (or business) side of the profession much faster than in the recent past. This is not only because of the current job market but because of expectations of current lawyers who have fallen behind the technology curve.

This class will help move each student forward in understanding the current realities of the legal profession and allow each student to hit the ground running upon graduation with practical skills that can be used regardless of the area of employment.

The class will not only focus on real-world applications, innovation and technology, but also the importance of collaboration to achieve optimal client service. Thus, there is an emphasis on the "firm" concept and group work. We will also have guest speakers from time to time.

After completing this course, students should have a better understanding of the business of practicing law. Specifically, how to organize and operate a law practice, utilize cloud computing and other technology platforms, market a law firm, and handle ethical dilemmas involving lawyers and clients. In addition, students should have a better understanding of how the practice of law has changed over the past quarter century and, in particular, over the past few years because of advancements in technology.

WORKLOAD/CLASS PREPARATION

Students should expect to spend, on average, approximately two hours preparing for every hour of class. Reading assignments are posted in the “Syllabus” and additional reading materials may be provided by Professors Glover and/or Thompson before class.

Nevertheless, the materials assigned for class are just the tip of the iceberg when it comes to available information online. As you work through projects, feel free to dive into other resources to make your class experience more meaningful.

LAW FIRM BUSINESS PLAN

The class will be broken up into groups or “law firms” with 4 or 5 members (or less depending on final class numbers) who will work together planning and structuring an innovative law practice throughout the semester.

The firms will complete various assignments as outlined below. Each firm will also create a comprehensive, written business plan for their law firm model. The business plan shall include, but is not limited to, the following:

- The name and legal organizational structure;
- Practice areas and clients to be served;
- The role of each lawyer;
- How lawyers will collaborate running the firm and serving clients;
- The compensation structure and funding sources;
- The firm’s technology platforms;
- How services will be delivered to clients;
- Staffing and outsourcing;
- A marketing plan;
- How the firm will address cyber security threats;
- The role of mobile devices;
- The use of artificial intelligence; and
- Exit strategies for the lawyers.

An appendix to the business plan shall include the firm's operating or partnership agreement and each of the written assignments completed throughout the course.

Here is a resource for business plans: [VIEW HERE](#)

The deadline for this final project is April 18, 2018.

BAR ASSOCIATION INVOLVMENT

Each class member shall become a Law Student member of The Florida Bar Young Lawyers Division Law Student Division (“LSD”) (<http://www.flayld.org/students/>). Each student shall engage in at least two meaningful activities with the LSD, The Florida Bar, The Florida Bar Young Lawyers Division, or the 8th Judicial Circuit Bar Association during the semester. This could include, but is not limited to, attending meetings, attending events, participating in public outreach efforts, or writing an article for a bar publication, among other options.

Each student will prepare a 2-page written summary of the details of the involvement for each occurrence, including, but not limited to, a description of the event, the date, why they participated, and the benefit they received from the participation. Each write up should also include a summary of the interaction the student had with at least one other lawyer or judge per event. The write up shall be included in the appendix to the business plan.

GRADING

Each student will be graded based upon class attendance and participation, the timely completion of assignments, and the analysis and quality of the participation and content of written and oral projects.

Participation and Attendance: 30%
Class Assignments: 20%
Business Plan: 50%

Information on current UF grading policies for assigning grade points may be found here: <https://catalog.ufl.edu/ugrad/current/regulations/info/grades.ASPX>

ATTENDANCE

Requirements for class attendance and make-up exams, assignments, and other work in this course are consistent with university policies that can be found at: <https://catalog.ufl.edu/ugrad/current/regulations/info/attendance.aspx>

Please note: your final grade will be reduced for each class session missed beyond one class. There are no “excused” absences; all absences are counted for purposes of this policy.

STUDENTS WITH DISABILITIES

Students with disabilities requesting accommodations should first register with the Disability Resource Center (352-392-8565, www.dso.ufl.edu/drc/) by providing appropriate documentation. Once registered, students will receive an accommodation letter which must be presented to the instructor when requesting accommodation. Students with disabilities should follow this procedure as early as possible in the semester.

ONLINE COURSE EVALUATION

Students are expected to provide feedback on the quality of instruction in this course by completing online evaluations at <https://evaluations.ufl.edu>. Evaluations are typically open during the last two or three weeks of the semester, but students will be given specific times when they are open. Summary results of these assessments are available to students at <https://evaluations.ufl.edu/results/>.

HONESTY POLICY

UF students are bound by The Honor Pledge which states, "We, the members of the University of Florida community, pledge to hold ourselves and our peers to the highest standards of honor and integrity by abiding by the Honor Code. On all work submitted for credit by students at the University of Florida, the following pledge is either required or implied: "On my honor, I have neither given nor received unauthorized aid in doing this assignment." The Honor Code (<https://www.dso.ufl.edu/sccr/process/student-conduct-honor-%20code>) specifies a number of behaviors that are in violation of this code and the possible sanctions. Furthermore, you are obligated to report any condition that facilitates academic misconduct to appropriate personnel. If you have any questions or concerns, please consult with the instructor or TAs in this class.

COUNSELING AND WELLNESS CENTER

Contact information for the Counseling and Wellness Center: <http://www.counseling.ufl.edu/cwc/Default.aspx>, 392-1575; and the University Police Department: 392-1111 or 9-1-1 for emergencies.

CLASS SESSIONS

Week 1 (1/10/18): Introduction and Overview of the Course

Discussion. We will review the current state of the legal profession and how this relates to running a law practice. We will also go over the expectations and components of the course.

Assignment.

- Susskind on Tomorrow's Lawyers: [VIEW HERE](#)
- 2017 Report on the State of the Legal Market: [VIEW HERE](#)
- The Future Practice of Law: [VIEW HERE](#)
- If Times They Are a-Changing, Why Aren't Lawyers Too?: [VIEW HERE](#)

Week 2 (1/17/18): Organizing a Law Practice

Discussion. Organization is critical to the success of every lawyer. We will discuss selecting a practice area/practice areas, personal productivity and time management. We will also discuss the actual legal formation of a law firm.

Assignment.

- Selecting a Business Entity: [VIEW HERE](#)
- Selecting a Firm Name: [VIEW HERE](#)
- Rules Regulating The Florida Bar: [VIEW HERE](#)
- Download and View Clio's 2017 Legal Trends Report: [VIEW HERE](#)
- The Middle Class, An Untapped Legal Marketplace: [VIEW HERE](#)
- The Industrial (Legal) Revolution: [VIEW HERE](#)
- How Access-to-Justice Efforts Are Changing the Law: [VIEW HERE](#)

Week 3 (1/24/18): Organizing a Law Practice

Discussion. We will explore how client service has changed and innovative ways to deliver legal services. We will also discuss how ethics issues play into these newer services.

Assignment.

- Office Space vs. Virtual Office: [VIEW HERE](#)
- Ethics Informational Packet (The Florida Bar): [VIEW HERE](#)
- The Virtual Law Practice: The Future is Now: [VIEW HERE](#)
- Law a la Carte: The Case for Unbundling Legal Services: [VIEW HERE](#)
- The Mobile Lawyer: [VIEW HERE](#)
- Review the ABA Model Rules and The Florida Bar Rules and determine the applicable sections to mobile lawyering.

- Articles on Apps for Lawyers
 - [12 Legal Research Apps for iOS Mobile legal research is finally maturing thanks to a rapidly expanding selection of high-quality iOS apps by John Edwards, Law Technology News](#)
 - [iPad Apps for Lawyers and Law Firms](#)
 - [iPad for Lawyers](#)
 - [Mobile Applications for Law Students and Lawyers](#)
 - [Nine Must Have Apps for Lawyers](#)
 - [Top iPad & iPhone Apps for Lawyers](#)
 - [Top iPad Apps for Lawyers](#)
 - [Apps, Apps and More Apps: an Annotated List of Free and Low-Cost iPad Apps for Attorneys and Paralegals](#)
 - [42 Essential Apps for Trial Lawyers in 2016](#)

Week 4 (1/31/18): Cloud Computing and Online Legal Practice Management Platforms

Discussion. We will discuss cloud computing from a lawyer's perspective, both practical and ethical issues.

Assignment.

- Quick Start Guide on Cloud Computing: [VIEW HERE](#)
- Due Diligence Considerations for Lawyers Evaluating Cloud Computing Service Providers: [VIEW HERE](#)
- ABA Cloud Computing for Lawyers: [VIEW HERE](#)
- How Safe is the Cloud?: [VIEW HERE](#)
- Florida Ethics Opinions on Cloud Computing: [VIEW HERE](#)
- Additional Articles on Cloud Computing:
 - [Legal Ethics Considerations for Lawyers Use of Cloud Computing Services](#)
 - [I am interviewing cloud providers. What questions should I ask?](#)
 - [What do I need to know about keeping my network secure?](#)
 - [How can I safely share files with a client over the internet?](#)
 - [Ethics in the Tech Age](#)
- Set up your firm Clio account, review the Terms and Conditions and Privacy Policy and be prepared to discuss the contents.
- Create a free Dropbox.com account and explore the various features and concepts behind it. Review Dropbox's Terms and Conditions in light of the ABA Model Rules.

Week 5 (2/7/18): Outsourcing/Staffing, Going Paperless, Legal Research & Other Law Firm Technology

Discussion. Every lawyer needs help in one way or another. We will discuss issues regarding staffing, choosing whether to go paperless, and advancements with legal research.

Assignment:

- How Outsourcing and Automation Can Ben: [VIEW HERE](#)
- ABA 20/20 on Outsourcing: [VIEW HERE](#)
- Going Paperless Articles:
 - [Advantages and Disadvantages of a Paperless Office](#)
 - [Going Paperless for the Law Office](#)
 - [How to Go Paperless](#)
 - [Paperless in 12 Steps](#)
 - [Paperless Chase](#)
- Legal Research Options:
 - [Westlaw](#)
 - [Lexis](#)
 - [Fast Case](#)
 - [Google Scholar](#)
 - [Ravel Law](#)
- Telephones
 - [VOIP Telephones](#) that can operate anywhere you plug them into an internet connection
 - Virtual Phone Systems: [Ring Central](#), [Grasshopper](#) or [Virtual PBX](#)
 - Call forwarding services: [Google Voice](#)
- Data Storage & Backups
 - This can range from solutions that permit you to access files anywhere to pure backup solutions that protect your data from loss.
[Dropbox](#)
[Barracuda Online Backups](#)
[Carbonite](#)
[iDrive](#)

Week 6 (2/14/18): Artificial Intelligence and the Law

Discussion. We will discuss how the development of Artificial Intelligence will affect various aspects of our personal and professional lives.

Assignment.

- Artificial Intelligence and the Practice of Law: [VIEW HERE](#)
- Technological Foundations of Artificial Intelligence: [VIEW HERE](#)
- 5 Questions on Artificial Intelligence: [VIEW HERE](#)
- AL Interview: Andrew Arruda, Co-Founder, ROSS Intelligence: [VIEW HERE](#)
- Podcast: Why Efficient Lawyers Use Artificial Intelligence. [LISTEN](#)
- How artificial intelligence is transforming the legal profession: [VIEW HERE](#)
- Can elite law firms survive the rise of artificial intelligence? [VIEW HERE](#)
- By 2026 computers will not have replaced lawyers: [VIEW HERE](#)

Weeks 7 & 8 (2/21/18 and 2/28/18): Marketing a Law Practice

Discussion. Naturally, client development and marketing of a firm's services are important to the survival of a law practice. With technology and social media, options are ever expanding. We will discuss ways to market a practice, including bar association involvement and ethics issues that go along with this issue.

Assignment.

- 50 Ways to Market Your Law Practice: [VIEW HERE](#)
- Mastering Local Search Marketing Is Critical to Your Firm's Success: [VIEW HERE](#)
- Make Sure Your Online Marketing Efforts Reflect Your Uniqueness: [VIEW HERE](#)
- Best Practices of Successful Law Firm Websites: [VIEW HERE](#)
- Getting Started with Email Marketing: [VIEW HERE](#)
- 5 Key Marketing Metrics for Law Firms: [VIEW HERE](#)

- Advertising and Ethical Considerations:
[Advertising Regulation—The Florida Bar](#)
[The Handbook on Lawyer Advertising & Solicitation](#)
[Filing Requirements](#)

- Online Ads
[Google Ads](#)
[Bing Ads](#)
[Yahoo Advertising](#)

- Online Reviews & Profiles
[AVVO](#)
[Martindale](#)
[Lawyers.com](#)
[LinkedIn](#)

- Websites
[Squarespace](#)
[Wix](#)
[Weebly](#)
[Jimdo](#)
[IMCreator](#)
[Webs](#)

- Referrals
 - Most lawyers will agree that a personal referral is the best way to build your practice. It takes time to build these referral sources and the best way to do that is to do good work and have that work recognized by other lawyers, clients and business people. This has always been frustrating for new lawyers, because how are you supposed to get these referrals if you struggle to get the legal work to show how great you are? Unfortunately, this sometimes takes a little while, but it's good to know what you can and cannot do when it comes to a referral from another lawyer. For fee sharing information, be sure to reference the [Rules Regulating The Florida Bar](#)

- Local Bar Associations
 - Referrals from other lawyers may be your best asset once your name gets out there. A great way to meet lawyers of a diverse age range and practice group is to attend a local bar event. In addition to having monthly lunches, CLEs, speakers and a wealth of other resources, it is also a wonderful networking opportunity. Most Local Bar Associations also have a Young Lawyers group so you can engage with your local peers as well. These associations typically have an annual fee, however some groups offer lower rates for newer or government lawyers, so don't be afraid to ask! For a list of Local Bar Associations throughout Florida, [check out this link.](#)

- Local Bar Referral Services
 - Often times the best referral sources are other local lawyers who have seen you in action and think of you when referring out a case. Joining the local bar association in your area is a great way to meet other local lawyers of all ages, practice areas and experience levels. Who knows, you might meet a new referral source, business partner, mentor or friend simply by attending some of their events! Depending on where you practice, your local bar association might be more or less active, but getting involved is a great place to start! Some local bars even have their own referral networks! Please see the current local Bar referral services throughout the state listed below:
 - [**The Florida Bar Lawyer Referral Service**](#)
 - [**The Florida Bar Lawyer Referral Service Coverage Areas**](#)
 - [**ABA: Lawyer Referral & Information Service**](#)
 - [**Palm Beach County Bar Association Lawyer Referral Service**](#)
 - [**Dade County Bar Association Lawyer Referral Service**](#)
 - [**Broward County Bar Association Lawyer Referral & Information Service**](#)
 - [**Hillsborough County Lawyer Referral & Information Service**](#)
 - [**St. Petersburg Bar Association**](#)
 - [**Clearwater Bar Association Lawyer Referral Service**](#)
 - [**Lee County Bar Association Lawyer Referral Service**](#)
 - [**Collier County Bar Association Lawyer Referral Service**](#)
 - [**Tallahassee Bar Association Lawyer Referral Service**](#)
 - [**Jacksonville Bar Association Lawyer Referral Service**](#)
 - [**Orange County Bar Association Lawyer Referral & Information Service**](#)

- Pro Bono/Low Bono Work
 - Doing pro bono work is not only rewarding, but a great way to gain experience and meet people in your community. The Florida Bar is currently reviewing and expanding its pro bono services and working to provide a greater access to justice. If you would like to learn more about pro bono work or would like to participate in a variety of programs, you can find more information at the links below:
 - [**The Florida Bar: Pro Bono/Legal Aid**](#)
 - [**FloridaProBono.org**](#)
 - [**ABA: Pro Bono Program Listings**](#)
 - [**Florida Institute: The Florida Patent Pro Bono Program**](#)
 - [**American Bar Association**](#)

- American Inns of Court
 - Most areas throughout the State have an established American Inns of Court. Inns are designed to “promote the goals of legal excellence, civility, professionalism, and ethics.” In a time when professionalism can be lacking, Inns can be an important bridge between opposing lawyers, judges and government lawyers with whom you might not practice. To find out more information about the American Inns of Court and to find an Inn near you visit their website at <http://home.innsofcourt.org/>

- Sponsorship
 - If you are targeting your legal services to a specific market, or have an interest in an event, either as a participant or spectator, consider sponsoring the event as a way to let others in the community know that you have opened an office in the area. Many events advertise on merchandise, the radio, in the local paper, news or social media, allowing your sponsorship of a single event to reach potential clients through several different news mediums.

- Print, Television & Billboards
 - Locally printed and distributed magazines can be an effective way to reach a local target market. These magazines could be recapping events and people in the area, or related to a specific industry, i.e. medical, construction, marine, etc. If you know you would like to represent clients in a specific industry, putting your advertising dollars to work in a specific area can be beneficial. Additionally, local television advertisements or well-placed billboards can gain you great name recognition. However, they will likely also cost far more than you might be willing to spend when you are first getting started, but may be a good investment a few years down the road!

- Local Civic & Business Groups
 - A great way to learn about your community and the businesses that serve the community is by joining a local business group. You might consider joining the Chamber of Commerce, Rotary, a business roundtable, or an industry specific group if your practice concentrates on a specific industry. Not only will you be meeting potential clients, but you will also be contributing to your community.

- Business Cards
 - Again, the internet offers a wide range of designs and price points for business cards, so first decide what is right for your business. Including both a phone number and e-mail address is advisable in order to give potential clients an easy means of contacting you. To find some quick and easy places to order business cards in various quantities check out these online resources:
 - [Vistaprint](#)
 - [Moo](#)
 - [Got Print](#)
 - [Jukebox Print](#)

- Lawyer Referral Services
 - Paid online or brick and mortar referral sources can be fraught with peril: proceed with caution! There are questionable referral services out there, so do your research before you sign up for any service provided by a private vendor. Recently, the Florida Supreme Court rejected The Florida Bar's proposed revisions to Rule 4-7.22.
 - ORDER- September 24, 2015- rejecting The Florida Bar's proposed changes to the [Lawyer Referral Service Rule](#).
 - [The Florida Bar tells Avvo Advisor it is a lawyer referral service.](#)

- Social Media
 - The social networking revolution has impacted the legal world as well. In the beginning, it was the wild west, but it has slowly but surely become more regulated by The Florida Bar. While social media can be an impactful way to reach potential clients, be wary of potential pitfalls. Check out The Florida Bar's guidelines below:
 - [Guidelines for Social Networking Sites](#)
 - [Guidelines for Video Sharing](#)
- If you do not have one, create a personal Twitter account and follow at least 20 lawyers/thought leaders who discuss the future of the legal profession, law technology and/or marketing.
- Create a comprehensive LinkedIn profile that will become your professional bio.
- Send your Twitter handle and LinkedIn profile to Professors Glover and Thompson before the start of the **2/21/18** class.

Week 9 (3/14/18): Initial Law Firm Presentations

Assignment. Each group or firm will give a 10-minute presentation on the following three topics: (1) An overview of the firm (name, structure, location(s)); (2) Types of clients that will be served (both practice area and method of delivery - i.e., the technology); and (3) How you will market the firm. Each member of the firm must be a part of the oral presentation. The group will turn in the materials used during the presentation (PowerPoint, Keynote, etc.).

Week 10 (3/21/18): Necessary Documents & E-Filing

Discussion. We will discuss how to operate a trust account, e-file, and access the “basic” documents you will need to start your law practice.

Assignment.

- Forms & Agreements
 - Once a client retains you on a matter you need to be sure your representation is clearly laid out in a written agreement and in compliance with the Rules regulating The Florida Bar.
 - The Rules Regulating The Florida Bar require different types of fee agreements for different forms of representation. Remember, if you plan to represent a client on a contingency fee basis, the Rules require the agreement to be in writing. Before having that first client sign on the dotted line, review Rule 4-1.5 in detail.
 - After the client is signed up and representation begins, or ends with a declination letter, additional agreements, letters, and forms will be necessary to ensure your business runs smoothly.

- The Practice Resource Institute of The Florida Bar has created The PRI Administrative Forms Handbook to help lighten the load. While The Florida Bar has not adopted any of the forms provided as “official forms,” they are an excellent starting point to creating your own forms to cover your specific clients and their unique matters. The available forms range from client communications, client intake, fee agreements, declination letters, financial, marketing and even personnel. These materials are available [HERE](#).
- Pleading Forms
 - If you are on the hunt for pleading forms, elements for certain causes of actions or some additional research on what it will take to prove your case, check out these resources:
 - If the cause of action is statutory, check out the [Florida Statutes](#) first.
 - [Standard Jury Instructions](#) provide a wealth of information when trying to determine what is necessary to prove your case.
 - [La Coe’s Pleadings Under the Florida Rules of Civil Procedure](#) (the most recent version is pricey so hit your local law library or look for an older version prior to purchase).
 - When first starting out, the idea of not “reinventing the wheel” is certainly tempting, and at times, necessary. But, always remember the risks of using someone else’s forms as fee agreements, pleadings, contracts or any other document will fall on you. Be sure you do your homework, check the Rules Regulating The Florida Bar and don’t be afraid to ask others what they have done in similar situations (once you have done your own research.)
- E-Filing
 - E-Filing Resources for Florida Lawyers: [VIEW HERE](#)

Week 11 (3/28/18): Business of the Law (financials, trust accounting, insurance, etc.)

Discussion. Whether or not lawyers understand how to run a business, running a law practice is running a business. We will discuss fee structures, financial and insurance issues, trust accounting and other concepts to keep a practice running successfully.

Assignment.

- Read ABA Model Rule 1.5: [VIEW HERE](#)
- Read ABA Model Rule 1.15: [VIEW HERE](#)
- Read ABA Issues Paper on Alternative Business Structures: [VIEW HERE](#)
- Read sample malpractice policy from FLMIC: [VIEW HERE](#)

- Articles about Malpractice Insurance
 - [Malpractice Insurance](#)
 - [Attorney Malpractice Insurance: Who's Got Your Back](#)
 - [6 Things Solo Practitioners Should Know About Legal Malpractice Insurance](#)
- Trust Accounting
 - Where Do You Start?
 - First, read Chapter 5, Trust Accounting, The Rules Regulating The Florida Bar:
 - [5-1.1 Trust Accounts](#)
 - [5-1.2 Trust Accounting Records and Procedures](#)
 - Practice Resource Institute
 - Then, check out the materials and forms on the Practice Resource Institute website. This webpage addresses the creation of trust accounts, management, and applicable rules:
 - [PRI Trust Accounting & Monthly Reconciliation Forms Using Microsoft Excel](#)
 - Open Your Trust Account
 - After you have learned the rules, open your trust account. Here are some helpful forms:
 - [Notice to Bar Foundation Form](#)
 - [Notice to Eligible Institution Form](#)
 - [Sample Trust Account Bank Notification Letter](#)
 - Don't forget to verify your account is titled properly:
 - [Attorneys Should Verify IOTA Account Titling](#)
 - The Bar now requires all law firms to have a Trust Account Plan. Why? Read here:
 - [Rule 5-1.2 Now Require Written Trust Account Plans](#)
 - Create Your Trust Account Plan
 - [Trust Account Plan Form](#)
 - Don't forget to fill out for your trust account compliance certificate, which can be found on your Annual Fee statement. The instructions are [here](#).
 - Your Trust Account is set up and ready to accept deposits. Now, make sure you know the rules. Here are some helpful tips:
 - [Commonly Asked Questions about Trust Accounts](#)
 - Reconcile Your Trust Account
 - After your Trust Account has been opened for one month, you need to make it a habit to reconcile your Trust Account. And then reconcile your Trust Account every month thereafter. Check out the Practice Resource Institute for templates, spreadsheets, and helpful information to make trust reconciliation fast and simple.
 - [PRI provides Excel Templates to use for monthly Trust Accounting compliance with The Florida Bar Rules](#). There are three workbooks. All three are required for compliant trust accounting procedures, and each has its own built-in instructions on usage. Additionally, there is a PDF document providing instructions about where and how to save these templates when downloading them to your computer so they are available year after year.

- Here are some other helpful resources to help you keep your Trust Account in compliance with the Rules Regulating The Florida Bar.
 - [Maintaining a TRUSTworthy Trust Account](#)
 - [Unlimited FDIC protection for trust accounts expires](#)
- Last, but certainly not least, check out this video about Maintaining a Trustworthy Trust Account: [VIEW HERE](#)

Week 12 (4/4/18): Firm Policies/Procedures & Cybersecurity

Discussion. A well-run law firm requests internal processes and procedures. We will discuss ways to develop and implement policies and procedures for innovative law firms. We will also discuss cybersecurity issues for your law firm. Please read/view the following before class:

- Law Office Policies & Procedures: [VIEW HERE](#)
- Cybersecurity and Email Encryption 101 for Lawyers (webinar): [VIEW HERE](#)
- Law firms must manage cybersecurity risks: [VIEW HERE](#)
- Prepare, practice, protect: A strategy for defeating cyberthreats to lawyers: [VIEW HERE](#)
- Large law firms' secret information from big-money clients entice cyberthieves: [VIEW HERE](#)

Assignment. Each firm will prepare (1) a written social media use policy and (2) a written client intake and matter set-up procedure. These will be sent to Professors Glover and Thompson no later than **3/28/18**.

Week 13 (4/11/18): Serving Your Clients/Wrap Up

Assignment. Each group will be sent a unique situation that their firm will encounter with a client or clients. The group will create a written response to how the situation will be handled, including the role of each team member, solutions, road blocks and citations to relevant ethics issues. We will discuss each situation and the group responses in class. Each group should be prepared to present their response and handle questions on the same.

The written response must be sent to Professors Glover and Thompson no later than **4/4/18**.

Week 14 (4/18/17): Presentation of Final Projects

Final projects must be sent to Professors Glover and Thompson before the start of this session. Each group will be prepared to present and discuss an overview of their firm and how they derived their law firm plan, including the challenges.