Ep #86: From Chaos to Consistency: Lessons from a Decade of Agile Lawyering with Jeff De Francisco

Full Episode Transcript

With Your Host

John E. Grant

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I'd bet a nickel that there aren't ten attorneys in the world who have been using Agile practices longer or more successfully than my guest today, Jeff De Francisco. Honestly, there may not be more than one or two.

Jeff was one of my very first consulting clients over a decade ago and his journey since then has been one of continuous improvement. Always refining his practice and systems to better serve himself, his clients, his family, his team, and even the broader community.

In today's episode, you'll hear how Jeff and I got started working together, the many ways his practice has evolved since then, and the lessons he and I have learned along the way.

Most importantly, you'll hear how you can benefit from Jeff's many years of evolution and experimentation to jumpstart your own agile journey.

You're listening to the *Agile Attorney Podcast*, powered by Agile Attorney Consulting and Greenline Legal. I'm John Grant and it is my mission to help legal practitioners of all kinds build practices that are profitable, sustainable, and scalable for themselves and the communities they serve. Ready to become a more Agile Attorney? Let's go.

Alright, welcome back everybody. So I am really excited this week, and I know I say that almost every time I have a guest, but this time I truly am really excited to have who's ultimately my longest term client.

I've been working with Jeff De Francisco in some capacity or another, I think for about a decade now. And we've had a lot of evolutions in our relationship. We've gone from a coach and client relationship, and over the course of that amount of time, I would say we have become friends. We've had some great dinners and things together.

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And we'll get to this a little bit more at the end, but we are now business partners in this thing that you've been hearing me talk a little bit about on the podcast and we'll hear more and more about, which is Greenline Legal. So with all that, Jeff, welcome to the Agile Attorney podcast.

Jeff: Thanks John, I appreciate you having me.

John: Yeah. So here's where I think I want to start is - Jeff and I had a lot of conversations and sort of testing the waters with each other about whether this Agile thing might actually work in Jeff's estate planning and administration practice. And again, this is about a decade ago, and finally he made the decision to hire me and bring me down to his office in Pasadena. And the first most notable thing about Jeff is that you had a baby grand piano in your office. So, tell me about that.

Jeff: I did. Well, it was a combination of a few things. So in college, one of my majors was in music composition. So I've been a musician for years and was a church organist for many years. And so music was near and dear to me.

But I also found that music brought comfort to people. And, you know, the law firm is pretty chaotic. And so it was partly an intentional action to bring some calm into a chaotic law firm. And, you know, in the mornings I'd play a little bit for everybody and just get everybody into a good mood, kind of set the tone.

John: Yeah. It definitely works. Although you called me because it wasn't enough by itself, right?

Jeff: That is true.

John: Music can soothe the savage beast, but a chaotic law practice can hype it right back up again. And so tell me or remind me, I guess a little bit

about what were the things that you were feeling, experiencing inside of your practice that led you to the point that you felt like, and I don't even think you knew what solution you wanted. You just needed to try something new.

Jeff: Well, I'm going to go back in time a little bit more than that, if I may.

John: Okay.

Jeff: And tell you the story of how I came to you. I don't even know if I've given you the whole story.

John: I don't know if I know. Yeah.

Jeff: And it really starts back probably 20 years ago. I was in a law firm and was drafting trusts and noticed that, you know, it might take me three, four hours to get an estate plan done. And some colleagues, maybe it took five or six hours, right? And the difference wasn't necessarily knowledge, it was just - I was a little bit more tech savvy, could use the computers a little bit better. You know, maybe I knew the forms a little bit better, you know, what have you.

But at the end of the day, I noticed we're all billing hourly and their clients are paying more than my clients for essentially the same plan.

John: The same product. Yes.

Jeff: And my colleagues are getting paid more than I'm getting because they've got, right, more coming in on those matters. I'd have to have one and a half clients for every one client they had. And I sort of filed that in the back of my head that there was an injustice here that I was going to solve at some point in my career. And over the years I started looking for

solutions, right? And there were the common ones. You know, you increase your hourly rate in order to make up for it.

Well, sounds good, but hard to do when you're in a law firm and all of your colleagues and your pricing is based upon number of years of experience or you know, whatever it is. You know, everybody needs to be the same. Some people might solve it by padding hours, right? That wasn't something that I was willing to do.

So what I have to look for? I had to look for something else. All right? And so I started reading and I came across flat rates. And so, well, gee, you know, that sounds good because as long as the flat rate is, you know, reasonable, then you've met all your ethical standards. But it also created the challenge. In order to make any money off of a flat rate and then build profit margin, you have to be very efficient. And so that led me down my search of many years of trying to figure out efficiency in a law firm and workflow systems.

John: And as I say all the time, efficiency is not the friend of the billable hour, but you were willing to divorce yourself from the billable hour in the name of efficiency and try these other ways of both working and also getting compensated for the work.

Jeff: Correct. And - but I would disagree with you a little bit on saying it's not the friend of the hourly, because it is to the extent. It may not help you from a monetary standpoint, but it still builds confidence in knowing you're going to meet your deadlines and reducing the stress of handoffs back and forth and knowing the status of your clients and where they're at. I mean, there's still a lot of benefits, you know, that I think have come with it.

John: Fair. Yes.

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Jeff: It's an interesting segue, because when I first started reading, I was reading law firm management books. And so, well, somewhere in here there's got to be the answer, right, of how to do this.

John: I guess to reframe my efficiencies out the front of the billable hour, efficiency is not a good way to score points in the game of law firm.

Jeff: And that's exactly where I was going to go. Every law firm management book talks about leverage, the partnership pyramid, the billable hour, right? And you're right. All of that leads you to a system of bill, bill, bill. It doesn't matter what client you're working on or whether you've met a deadline, just so long as you've got hours into the system, right? And you're right, it's inherently completely inefficient.

And then somebody told me to start looking outside of the law firm. So I started reading books on software companies and tech companies and manufacturing companies and how do they manage their workflow? And that's really where I started to come across these ideas of Kanban and really Agile, I think was the first thing that came to me, which you'll probably have a good technical definition of that, but -

John: Well, I at least branded myself well for that search to come up.

Jeff: That you did, right? And so, you know, I'm, you know, in my layman's terms, it was how to make big change by doing small incremental pieces at a time until you get to the big change.

John: That is a better definition, more succinct definition than I would have given. So we'll go with that.

Jeff: So I started saying, well, I could do this in the law firm and that would give me exactly what I'm looking for, whether hourly or flat rate, right? I'm looking to get more efficient. Did some Google searches, found you.

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John: Okay. Again, fortunate branding. That's good. And I've been writing about it and things at that point.

Jeff: Correct.

John: And working on it, but I will readily admit, and you and I have talked about this, I was pretty green at it. It was very much in those early days for me, a hypothesis, can these things that are working in technology work in legal? And I think the answer now is a resounding yes, but the answer then was, eh, that's worth a shot.

Jeff: I think that's true. Neither of us knew what we were getting into.

John: Yeah, yeah. Well, and it's interesting, and without diving too, too deep into the weeds of methodology, I think one of the things that you and I discovered over time together, although I'd gotten some of that before starting to work with you, is that in the tech world, Agile and Scrum were mostly conflated.

And I now am emphatic that Scrum, except in very rare circumstances, is terrible for legal, does not work well in legal environments. There's concepts and principles and practices from Scrum that we can use, but the methodology overall is just far too rigid. And just far too focused on the needs of tech teams.

But Kanban is pretty good. And I think it's better now as we're - you and I are practicing it today - than it was when we built that first board on your wall, which I still have photos of. I don't have great photos of it, and I think I have a redacted version. I don't - maybe you'll let me post it in the show notes, but it doesn't have any client names on it or they're all photoshopped out, but it's quite a thing, right? I mean, we took an entire very large chunk of wall and I don't know how many total sticky notes there are on it, but it's well over a hundred. It's probably closer to 200 or even more.

Jeff: I think the shareholders of 3M were very happy with me that year.

John: Yes. And we did some interesting things, right? We had both of your estate planning practice and your administration practice on the same board, on the same wall because we were sort of hampered by the available real estate to use, right?

But thinking back on that, and I would love your recollection and reflection on it. So even after that relatively chaotic first sort of three-day workshop we did, where at the end of it, we've got every matter in your practice, I think, or pretty close to every matter in your practice represented by a sticky note of certain colors. And each of those sticky notes lives in a certain column on this wall. How did that feel to you relative to the before state?

Jeff: Well, this actually will partly answer your first question that I never finished. How was I feeling right before? Life was chaos. Like every attorney, right?

You got tons of cases. A phone call comes in, you take the phone call. An email comes in, you answer the phone call. You're constantly juggling back and forth. You're doing the work that, you know, you need to do. Your associates, paralegals are doing their work. You get to the end of the day, there's a pile in your inbox of all the work they did for you to review that night and that weekend, and then rinse and repeat. You do it every single day, every single week, right?

I mean, everybody had quality of life except for me is the way it always felt, it - which I'm sure everybody was in the same boat, but. So what the board did, as soon as we got all those stickies up there, it was just instantaneously, you could see exactly the status of every single case you were working on.

Simultaneously, you could see the columns that had more sticky notes, there was a problem. I might not have known what the problem was, but I knew that there was a problem. If there's a bunch of sticky notes sitting in the signing column, well something's going on. Either they're not getting signed or the binders aren't being put together or whatever or quality control.

I didn't understand the full methodology at the time, but what I understood was, I know where everything is, I know I have a problem, I know I need to fix it. And then I think we spent a few years trying to figure out how to fix it.

John: Yeah, well, and to some extent, are still working on that. And I think one of the things that for people that have maybe not even started this journey or are in the early stage of this journey is it's kind of a lifelong journey, right? You never are going to perfect it, but every little step of progress you make is going to hopefully help you, help your team, help the client, whoever, get just a little bit better.

Jeff: And we started really with that Agile that we had learned about, right? You helped me find some small things to change, change it, and then watch and see what happens. Did it get better? Did it not get better? If it didn't, we tried again. If it did, great. Let's find the next bottleneck. Find the next small thing. Right? And so we really did use incremental change in order to make huge culture shifts in the way that my entire team thought about how to run a law firm.

John: Yeah, that's interesting. And so, I don't want to like rehash all of the history of it, but we had a lot of versions of that board. I mean, we had a few different versions with sticky notes and eventually we did separate the administration from the planning and then I think we even pulled probate off separate from administration and then you've had the handful of business things and so it became multiple boards.

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You eventually invested in several shees of sheet metal and we converted it from a sticky note wall to a magnet wall, which I'll pause on that for a minute because the one innovation that the magnet wall enabled or at least made it easier was those individual tokens that people could put on matters. I think that was a really useful mindset shift. Maybe describe that for a minute.

Jeff: Yeah. So I think, like I said earlier, when we're working hourly, all you care about is you're getting work done. But as a team, you care about that you're working on the thing that needs to get worked on in order to meet a deadline or what you promised the client or whatever it is.

So the tokens allowed us to put on each matter, we had numbers, you know, like one through five, let's say, five different tokens per person. And you could put on that matter your tokens, one, two, three, however many you needed to for the priority of that matter for the day. So now everybody knew what was being worked on and as a team, you could have a conversation of this is really important, let's make sure we're working on it.

And it helped focus everybody, not to take the extraneous phone call or the email or go do the easy thing that you really wanted to do, right? Because you had to do what you put your token on. Well, had to. Were we always successful? Of course not. We're human.

John: Right. And I should add by this time you're doing a daily standup in front of the board, right? So there's a daily meeting and the tokens represent both individual commitments, right? I'm getting, you know, whatever my color or my initials are on this thing and then it's got my number one priority or my number two priority. When I stick that on a matter, I'm making an accountability promise to the rest of my team that this is the thing that I'm going to work on.

I also think the finite number of tokens was a way, and you know, I talk on the podcast all the time about the honest reckoning with capacity. By only having five or six tokens, it helps prevent people from overcommitting and over promising, which was - that's just a human problem, right? We all have optimism bias.

Jeff: Absolutely. No, I agree. I mean, the tokens really made a huge difference. But I think to be fair, it was also one of the challenges of implementing Kanban because you know, it's a great system and I, you know, obviously I love it and I stand by it, but anytime there's change, there's chaos. That might not be the right word, but you know, there's there's resistance. That's the right word.

John: Well, and I think you had a paralegal that left the firm not too long after implementing one of the versions of Kanban because it just - they weren't comfortable working in that way. And that's part of it, right?

Jeff: That is part of it. I mean, Kanban really is a team effort and not everybody likes to work in a team environment, which is fine. I mean, there's plenty of other models out there. It's a mind shift, right? We come out of law school, we start into these practices that just hound on you to bill, bill, bill, do everything as it comes, really not to prioritize.

And so you're asking people now to actually do what they say they're going to do. And if they don't, everybody knows they didn't do it because you just had a meeting about it. Now, you're not calling the person out, you're not shaming the person, right? There's none of that involved. It's really self-consciousness that causes the person not to feel comfortable.

John: It doesn't mean they don't feel shame, but we're not - like it's not part of the method. This is not a blame and shame methodology.

Jeff: And in fact, sometimes you don't even say anything. You just look at the board and you see it and you're like, okay, let's do better today, right? For some people, that's not a good environment for them. For me, yeah, a couple people left, but then for the most part, people loved it. They just like the organization of it. They - now it was very clear what they needed to do. When they finished working a project, they knew what to do next. They didn't have to come ask, right? I mean, it brought organization into a chaotic world of law.

John: Yes. Yeah. Well, and you know, we won't hit on all the benefits, but you just touched on one of them, which is, and you and I have had conversations about this. Like one of the banes of law firm owners, and I hear this from folks other than you, is when you know that there is so much work to do inside of the firm and someone comes to you and says, hey boss, what should I do next?

Jeff: Right.

John: Helping them navigate the quantity of work is not a good use of your time.

Jeff: And I got to say, it's probably been a good eight or nine years before I've had that question asked, so kudos to Kanban for helping me with that one.

John: Yeah. That is - that is a benefit. Yeah. So by seeing the process and understanding that the cases, the matters flow through a process and other elements about it, right? We had this sort of clever in the physical board world, we had this sort of clever way of having the definitions of done for each stage, the exit criteria, represented by numbers on the card. And as those things got, quote, unquote, checked off, people would just use a marker and slash through the number on the card. And then when it moved to the next stage, the numbers reset and we did it all over again.

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Jeff: So you actually bring up an interesting point of degrees, if you will, of Kanban, right? Or complexity of Kanban if you will. I mean, we didn't start with that. Just getting it onto your board and seeing you know, what you asked me before, just seeing where your matters are, like that's number one, right? Make your work visible. Isn't that - see I learned something.

And it's true. If you just did that and stopped there, you would still reap a huge amount of benefit. And then as you get more comfortable, you can add the bells and whistles, but you don't need all of that in order to use the system.

John: I think the thing that happens, and this is what I talk about with a lot of my clients, right, is I still think the defining factor of most lawyers in most situations is one of overwhelm. There's more work available or demanded of you than you've got the comfortable capacity to deliver in whatever time period you're talking about.

And so I talk about helping get your practice from the rolling boil to a gentle simmer. And then when that happens and you can, you know, whatever, the elephant's not on your chest, you can take a deep breath, you can whatever, then all of a sudden you start thinking bigger picture and it's like, oh, it would be great if I could X, right? Whatever it happens to be.

And part of what I've loved about the method and I think we've proven in our work together around the method is if you've got that next question you want to try to answer, we can usually come up with a way to answer it, right? A technique to try at least. And we don't always get it right on the first try, but eventually we'll settle on something that seems to work.

Jeff: No, I agree. And maybe this is a spoiler alert, but I'll tell you once, once you get your work visible, I think the majority, if not all law firms are going to discover that the problem is intake.

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John: Mmm.

Jeff: Right?

John: Yes.

Jeff: Well, I'm sure you've talked about that plenty.

Jeff: Yes, right? Because you're going to see a whole long column in the quality control or whatever your firm calls it, where the partner reviews the work before it goes out, that's all in a backlog. And if you don't stop increasing the amount that goes into that column, that column's never going to go down. And you really got to get control of it.

And you know, I remember when we talked about it, you know, I'm sure you're going to lose income, no one's ever going to come to you again, you're going to lose business. None of that happened. None of that happened.

John: Right.

Jeff: And I think, you know, this isn't a necessarily a Kanban matter, but if you just get the world of law as it is today, right? There's just - there really aren't enough lawyers out there, especially in the estate planning field. You know, despite what the newspapers might say, there's plenty of work and the laws are just getting more and more complex. So I just, you know, think you got to get kind of beyond the fear of intake and -

John: Yeah.

Jeff: - focus on your practice.

John: Well, and it's interesting because that fear is real and I think that fear is reinforced by a lot of the conventional wisdom of law practice, much of

which comes from an era where maybe that was less true, right? There were more lawyers relative to the demand and the work wasn't quite as complicated. Not to say it wasn't complicated. So I think that's one part of it.

And then the other is that as you build capacity and come up with different ways of working, you can meet client needs in such different ways. And so that's kind of one of the other things I wanted to talk with you about and you know, we've got so much we could talk about, I could have you back again and probably several times.

One of the things and I've talked about this with a lot of people, right? When we first started working together, your intake process and your consultation and intake process, the blunt way of saying it is is you were doing a lot of work for free.

Jeff: Right.

John: Right? You overdelivered on your consult in a way I see a lot of lawyers do. But I think you have a particular bent towards number one, high quality work product and number two, high quality client experiences. And those combined to get you at a place where you really got people into a good place before they even engaged you.

Jeff: I was always a believer in the free hourly consult. You know, the idea is you provide the free hour, you get to know the client, they're going to stay with you, you know, they'll sign you up. Well, the reality is they may or they may not, depending on what they're trying to compete on, right? If they're looking for personality or price or you know, whatever it is.

And I think what you're alluding to is I actually still do give away those free hours. I actually give away more free hours in the beginning than I used to, except they're not technically free anymore because I'm getting reimbursed for them, if you will, once the client comes in and I set the flat fee.

So the idea being, if you spend more time with your client for free and you ask them for more information up front, you get to know them better.

John: Yes.

Jeff: You help figure out their goals. You've now made a connection. You made a spiritual connection, you made an emotional connection. They've put a lot of effort into it. The likelihood of them going somewhere else is pretty slim. And then that allows you to for what I'm doing now is I charge a flat rate for that whole initial consult period.

So I might give you a couple of meetings for free if I think you're the right type of client for me, but then when I quote you the flat rate to do the actual work of gathering all of that information, putting it into a report, sets forth your goals, sets forth my analysis, you know, I do a lot of estate tax work. So having an estate tax analysis in there, right? And then provide them with ideas for changes that they might want to make or a tax plan they might want to make. So I've recouped all of that time plus in the flat fee that I've set for that stage.

John: Well, and that flat fee, and so there's two things going on here that I think are worth pulling apart. Number one is that you sort of borrowed from the consulting world and created an initial flat fee product that is the initial assessment. Right?

And so you're not drafting any estate plans for anybody in that first go round. You're really trying to roll up your sleeves and dig in and understand what is going on with this person, with this family. What are their sources of income and what are their sources of assets and reviewing all the other estate plans and vehicles that they've maybe done in the past.

And effectively you're doing a gap analysis, right? Which is, okay, based on my expertise, here's what's going to happen. What would you like to have

happen, and which is what you're doing in those pre intake calls. And you can say, well, what you want to have happen isn't what's going to happen based on all the things that I've looked at.

Jeff: Correct, correct. It's a totally different model and it doesn't work for every practice. I fully appreciate that, right? I mean, your clients have to have a certain amount of complexity in their life that they're willing to do this.

John: And you're doing mostly high net worth individual estate plans and families, estate plans.

Jeff: Correct. But it can still be done on a smaller scale. But the idea, again, you know, the idea like you said is they're investing some time and why are they coming to you? Right, I always kind of stop and think and it's a question I always ask them, why did you call me? Is it a financial advisor that said you should do it? Your CPA? Did somebody in your family die? You know, your kids just graduated from college or got married or you know, there's usually something and then so you explore that.

Okay, what was the fear behind that or the concern behind that? So let's make sure we're addressing that. And it's a great segue right into, let's do an assessment to make sure it's being addressed. And if not, let's figure out how to address it.

John: Yeah. There's so many things I love about that. I mean, it's treating the clients at the human level, right? Which is one of the things that I think you are especially good at having gotten to know you through the years. And I don't want to sound crass or opportunistic or anything, but there is another element of it, which is you're not just flat feeing this work, you're value pricing this work.

Jeff: If you want to go there, we can go there.

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John: Well, let's go there.

Jeff: That's a whole another conversation.

John: Let's talk about what the difference, like at a high level, what's the difference between those two things?

Jeff: So to me, you know, flat rate is just saying, here's the amount that it costs to do this. And usually for lawyers, we tend to think, okay, how many hours would it have taken me and we convert it to some hourly rate, which really isn't the right way in theory to do it.

John: But it's a fine starting point, but it's not going to get you where you need to be as you change the model.

Jeff: Exactly. Whereas value-based billing is really a subset of flat fee where the fee is more determined by the client than it is by you. You're helping the client determine what's the value of what you can provide them, and they're usually willing to pay more for that value because there's that emotional connection to it, right? It's human psychology, which I should mention was my other major in college is psychobiology.

John: Okay. So you come by this naturally.

Jeff: So kind of, you know, bring this together and it's - I wouldn't call it opportunistic, it's helping people see that there is value in what the attorney is providing. We're not providing product. Right? The product is the end result. What we're providing is a process. We're providing a conversation; we're providing emotional support. You know, I mean we're 90% psychologist, 10% attorney. And that's something, you know, ChatGPT is not going to do for you, right?

John: No. No. Certainly not well.

Jeff: So, not to diverge down that conversation, right? So, so it is. I mean, people are happy to pay for it because now I'm no longer scared to go to the attorney. The attorney is now my comrade in this journey together.

John: All right. So without wanting to like gloss over it too much, having the systems in place using your Kanban board and the other practices of Kanban are part of what enabled you to go where you needed to go to create these productized legal services, offerings and have them be productized on a value pricing basis and not just a true flat fee basis.

And there's any number, I mean, I again, we can't exhaust the list of things that I think that the method overall and the evolution over time has sort of helped you achieve. I'm going to fast forward to the thing I teased at the end, which is you and I are in business together now.

Jeff: Right.

John: And I've been talking about Greenline.legal off and on on the podcast and it's part of my intro now and things like that and some of you may have gone and looked at the website and thank you for those who have and some of you may want to and all the rest.

But I guess when, I mean, you and I have talked about different models for sort of trying to bring what we've learned together to more lawyers, partly because we think that it's just worthwhile, right? I mean, it makes lawyers' lives better without being over dramatic about it.

Jeff: No, that's definitely true. I have lived it and I've seen it and I've felt it. And do I still work hard? Of course, I work hard. Do I work as hard as I used to? Nowhere near. Am I making more money than I used to? Yes, right? I mean, the methodology can work and help you find that balance that you want in your life. I didn't want to work weekends anymore. I don't want to work the evenings anymore. I want to spend more time with my

family. I want to go sit by the beach when I'm on vacation and not in the hotel room working, right?

John: Right.

Jeff: I really believe that this whole methodology allowed me to do that. And I think you touched on a little bit, but I think it's one of the keys, which is really the bridge into Greenline, of Kanban is one thing. I get to see all of my cards, I get to see all of my matters.

What really, I think that some of the knowledge I want to bring to everybody is that you have to have a procedure for how you're going to approach each of these matters and coming up with the checklists. And we all have checklists in our practices, right? Sometimes they're in our heads, sometimes they're in one place, sometimes they're in ten different places, but we all have them to some degree.

But putting them all together and making it systematic so no matter who in your firm is working on a matter, they know exactly what to do and when to do it is like the holy grail of efficiency.

John: Yes. And it's efficiency not through speed, but through consistency and predictability, which are, you know, the things again, I talk about all the time on the podcast. But I mean, I think you've really lived how, yes, ultimately, do we want the work to go faster? Of course we do. But we don't get there by just trying to work harder, right? We get there by defining what quality looks like and what our standards are and what the process and procedures are.

Jeff: And you hit the key there on quality. It's - the process and procedures reduce the amount of time I need to take in reviewing the work that my staff does for me, my team does for me. That alone has sped things up because

things can get out faster because it doesn't take as long for me to review. It doesn't go back and forth as much. That's a huge, huge plus.

John: Well, and I think part of our consultant client relationship over the years has been me pulling your policies and procedures out of your head and literally you watching me type sometimes to make sure that I'm getting it right. But I kind of served as the useful idiot in a lot of ways to be able to say,

Jeff: You're the smartest idiot I know.

John: Well, thank you. But it really is. It's like, okay, I hear you saying this. Like, great. Now that it's out on paper and we can both look at it, is this what you meant to say? Is this actually going to work? And a lot of times the answer was, no, oh gosh, there's this other thing we have to do first and right, we figure all that out together.

John: And I think that's really what we're trying to provide for the Greenline users. Now, the checklists are all changeable, right? Your system might be a little bit different, but at least it gives you a place to start and to have a conversation with your team to say, we're going to do it this way, we're not going to do it this way, let's integrate our things. I wish I had a place to start. My place to start was regurgitating it all to you so that you could type it out for me and I have a place to start.

John: Yes, which is a very expensive way of doing it.

Jeff: Yes, it was. But well worth it.

John: Thank you. But yes, I'm glad it was worth it. Well, let me back up for a second and just describe. So Greenline, for those of you that haven't checked it out, right? I have said for years as a consultant that I'm mostly software agnostic and that at a very basic level still is true and has always

been true. But as I did this over the years, I definitely had a couple of software tools that became my go-to tools.

And our other business partner in Greenline, Dimitri, who I'm hopefully going to have on the podcast soon as well, has a background in creating Kanban software tools and one of his other tools was sort of became one of my go-tos.

And what I like about these go-to tools is that they're not just about making the work visible, they support some of the deeper elements of the Kanban method. So, limiting work in process, better defining processes and procedures and quality standards and then also the ability to use sort of a rich iconography to convey information visually so that you can use your intuitive pathways to understand what's going on in a law practice as opposed to having to read about it.

Reading is an expensive pathway. And it's also hard to compare words against each other when you're talking about 40 different matters.

Jeff: And I think this is where you and I approach the software slightly differently. The methodology is very important. Don't get me wrong, but that's not where my focus is. My focus is on usability.

I'm the run, the day-to-day running the practice. It needs to have a lawyer lingo. It needs to be something my paralegals are going to understand, right? They don't want to be mired down in all of this theory. They just want to be able to sit down and be able to use it. And that was really the impetus of creating a software specific for the lawyers, specific for the legal field.

John: Yes. I would say, I think we've done a pretty good job of that. I think we still have some improvements to make and that is inherent in the method and the approach, right? And we will make them. But I think the product that we've got is really, really good and I think it's better than

anything else I know of that lawyers are using. Which isn't to say I know it all, but I've seen a lot.

So one of the other things that I think you bring, which has been great, in addition to that focus on simplicity of the user experience and usability, which, you know, I think I've mentioned before, my wife is a usability expert, so she would very much appreciate that.

But is this focus on creating default templates across different practice areas so that when lawyers and their teams come onto the system, they're not starting from scratch like you and I had to, they actually have a place where they can look at it and say, okay, that's pretty close to my workflow. It's not exactly right, but I can go in and make a couple of tweaks and I can make it my workflow.

Jeff: That's right. And yeah, obviously I'm in the estate planning field, so those templates are easy to create. We have the estate planning, administration, probate, business, real estate. But we're branching out, right? We've got litigation. How do I use it in a litigation? I mean, this is a great tool for litigators.

John: And I've worked with enough litigation firms over the years that I've got a pretty good sense of what those defaults are. Although it does - it varies by jurisdiction, it varies by practice area.

Jeff: Right, right. Family law. I mean, there's so many areas. I really believe any area of law can use Kanban in their system, right? And we're developing the templates for all of them and they're not all done yet, you know, to be fair, but they are getting worked on and if there's somebody out there who wants to use the system, we'll help develop the templates for you.

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John: Absolutely. Yeah. Yeah, well, I mean, that's what I've been doing in my consulting world for over a decade. So I'm happy. I'm happy to do it.

Jeff: Right. But the templates really are, it takes a lot of the burden off of you of having to go through and figure out all of your systems and get them written, right? I mean, that's a huge amount of hours and work. It's always easier to edit than it is to create. And so we want to give you something that you can edit and finetune specific for you. Some of you might like it and say it's fine. Others of you might want to add your fine tune touch to it.

John: Well, and I will also say one of the things that I've found with the earlier firm, the early adopters, is they're really relieved to not have to build it, right? They have something that's in their head but they don't have it or maybe they've got it on paper or maybe they've got it in their law practice management system but the way that it applies it is not ideal. I guess I'll leave it at that. I'll be generous. It's outright frustrating to a lot of people I guess I should say.

Jeff: It is. And you know, the other part of having the checklist is using it. So now you have it in a place where everybody can see it and everybody can use it, right? Which is the opposite side of the problem, right?

John: Well, and the other piece to it, and then we'll wrap up this sort of round one, but getting back to those tags that we used on your magnet wall way back when is we've built into Greenline the ability to do capacity, at least certain levels of capacity analysis. I can see all of the things that the people on my team have committed to are working on, to some extent how they've prioritized those things.

And that helps me do two things. Number one, load balance if I need to, maybe more than two things, to provide accountability if someone is not keeping up, but then also going all the way back to what you said about intake, maybe I'm overloading the whole team and I need to make sure that

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I'm not bringing in too much high level work that's resulting in the imbalances further down the path.

Jeff: I mean, ultimately it's a visual workflow management system. So you can see visually all of the work in your office and then from that glean information so that you can improve your systems and hopefully get some quality of life out of it as well.

John: Yeah. Okay. Well, so we're clearly plugging our software product, which, you know, it's my podcast. I get to do this. But if we sort of pair it back and we say, software Greenline aside, if you had advice to give to a typical law firm owner, small to mid-sized firm, what would you suggest as a good, maybe a good starting point or maybe just sort of good life advice?

Jeff: Well, I think especially today's world, we're all stuck in this chaotic circle. Work, work, work, work, hard to find life. And we all complain about it, but we're not doing anything about it. So I'd say the most important thing is do something. It doesn't have to be Kanban. If there's something else you want to try, fine, but try to do something different than the way it's always been done if you're trying to break the cycle.

John: Right. The conventional wisdom of the profession does not have the answers for breaking the cycle of the profession.

Jeff: Correct. Correct.

John: Yeah. Love it. All right. Well, let's leave it at that for now. So thanks for coming on the podcast.

Jeff: Thank you, John. I appreciate it.

John: All right, I'm just going to give you one takeaway to leave you with, although it's one that aligns with the things that I say week after week on

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this podcast, which is when you use Agile tools and practices to align your commitments with your capacity, and then you make those tools and systems visible and usable to your whole team, you can unlock this whole new level of delivery and accountability and alignment, which ultimately winds up letting you get more of the right things done with the team you already have.

And then you also can evolve together to come up with new and better ways of delivering the work that you do.

If you're ready to get started with or maybe take the next step along your own Agile journey, I encourage you to check out the tool that Jeff and I are building at Greenline.legal. When you click the Request A Demo button, you're going to set up a call with me or maybe even me and Jeff together, so we can talk through your pain points and see how Greenline as a tool and how Agile practices more broadly can help you solve them.

As always, this podcast gets production support from the fantastic team at Digital Freedom Productions and our theme song is "Hello" by Lunara. Thanks for listening and I will see you again next week.