

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke



Full Episode Transcript

With Your Host

John E. Grant

[The Agile Attorney](#) with John E. Grant

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

I love getting perspectives from outside the legal industry and for this week's episode, I'm excited to bring you my interview with Michael Clark. Mike is a co-owner of a financial advisory firm and co-author of the book, *A Firm Worth Building: Running a Better Professional Business*.

You're going to hear us talk about a balanced approach to business growth, understanding what people are really looking for when they hire a services professional. And the importance of creating what Mike calls success manuals for your business, including ones that are written specifically for clients. I also talk with Mike about what he looks for when he hires lawyers for his own needs and what he looks for when referring his clients out for legal help. Ready to become a more agile attorney? Let's go.

Welcome to *The Agile Attorney* podcast powered by Agile Attorney Consulting. I'm John Grant and I've spent the last decade helping lawyers and legal teams harness the tools of modern entrepreneurship to build practices that are profitable, scalable, and sustainable for themselves and their communities. Each episode I offer principles, practices, and other ideas to help legal professionals of all kinds be more agile in your legal practice.

Alright, welcome back to the podcast. I'm really excited this week to have a guest that I have not met before, which is the first time I'm doing that on this podcast. So, Michael Clark, welcome to *The Agile Attorney* podcast.

Mike: Hey, thank you very much, John. It's great to be here.

John: Yeah. So let me have you introduce yourself, because you're going to do a better job of it than I would anyway.

Mike: Well, I will do my best. So, my name is Michael Clark. I'm the co-founder of a firm called Protection Point Advisors. We are a registered investment advisor based in California, but we have representatives all over the country. And we also have professional relationships with many,

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

many different professionals that are also scattered about this great land of ours, I'll just call them the lower 48.

John: Excellent, great. And so, part of what interests me about having you on the show is that you have co-authored a book called *A Firm Worth Building*, and the subtitle is *Running a Better Professional Business*. And I'm the weird guy that is drawing all these parallels between technology practice and the legal industry. You're drawing parallels between different types of professional services, accountants, financial planners, insurance brokers and, of course, lawyers.

And right off the chute and it may even be the intro material in your book, I don't remember exactly where. But I can imagine some lawyers bristling a little bit at being lumped in with all these other professionals. Because insurance sales or financial planning, there's this general feeling that that's really salesy or there's this hustle component to it.

And for better or for worse, lawyers, we're part of this industry that has this long history of professionalism and it wasn't even allowed to do advertisements until a generation or so ago. So, what are the things that you see in common across all of these professional services firms, including lawyers?

Mike: That's an interesting question. I think what we've found and I do not mean this to in any way impugn anyone's expertise. But we find that those that have professional practices, and we certainly were and are in that category is, they are running their businesses like practices, but they're not running their businesses like businesses and let me explain what I mean.

I've met attorneys, for example, that leave the firms they're at to kind of hang out their own shingle, which means they're out building their own book for their own clients. So, they start off not being especially busy because they're building, but they get to the point where now they've got

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

enough work that they've traded in one form of imprisonment for another, which is, I don't have any money. Now I have money, but now I have no time. And that's kind of one example of having a practice but not necessarily having a business.

Because most business owners will tell you, they want a business that can run by itself. But a practice like that, it's not going to run by itself, it's entirely owner centric. So, we wrote the book as an explanation about how to get out of your own cage, I guess. How not to make so many of the mistakes that we made. I've been asked, "Well, what's the secret to your success?" And they say that if you climb Mount Everest, you're going to sooner or later step over the corpses of climbers who tried and failed. I feel like I'm that guy who climbed up Everest and didn't die.

The secret of my success is I didn't die. I made every single mistake you can make along the way but I managed to learn from them. We managed to learn from them. And along the way, learned how to take ourselves out of the center of our universe and have the business run without us. And so today it's a very different business for us. And so that's what we wanted to sketch out in the book, if you're a professional, how did you get there?

John: That kind of puts you, I mean, consistent with, I know a lot of lawyers pay attention and have read the book, the *E-Myth*. And I think that you have some common themes with that, profit first, built to last. There's lots of different places. And again, I sense from the book that you've drawn some guidance and inspiration from some of those places, but also you put a lot of your own spin on it and pepper it with your own experiences.

Mike: Yeah. No, for sure. I mean, I think you're always drawing what you can from wherever you can, but your own experience is always the best teacher. I mean, the subtitle of the book could have been, Here's What Not To Do. And I will say I'm so much more an expert on what not to do than probably anything else.

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

John: Right. Well, and one of the things I really appreciate about the tone and the style of your approach is that you're not trying to be a systems guru and saying, "Hey, 10X my business by following this concrete path." And if you deviate too far over this path, then you're crazy or you're doing it wrong or whatever."

And actually, I had a conversation with another guest a few months ago, Melissa Shanahan, where it's common and you probably see it in your industry too. There are a lot of law firm consultants or coaches or gurus or whatever the right frame is, that are very much about sort of capturing people into their plan. And the epiphany that Melissa and I kind of had together over the course of that conversation was people who were drawn to that style of coach or program are probably looking for a boss more than they're looking to be the business owner themselves.

They're kind of searching for someone to tell them what to do. And I'm going to back that up and talk about, in the book you talk about the difference between having that employee mindset and having that business owner mindset, which you talked about. I guess, what's the difference? What are the things that really are the hallmarks of someone that is always to turn their profession into or their professional expertise into a lasting and growing business as opposed to just doing the work inside of a firm, whether you own it or not?

Mike: Well, you have to begin with the end in mind as it's been written about. I have to know, what do I want to build? What does it look like? And then break it down further than that, break it down into the sum of its components. How many clients is that? What is my revenue per client? And also, I think what's seldom done is examining well, who are these people and what are their values so their values align with mine. I think one of the worst things you can do is take on a client where there isn't that kind of alignment and they wind up being just awful to work with because there's no compatibility there.

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

So, I think defining, well, who do I work well with? Do they represent what I need to build the business? I mean, in our business there are a lot of great people that need us but, frankly, they may not fit other aspects of our ideal client profile. So, you've got to know what you want, what you want to build. What does it look like? And I think lastly, how is it going to change your life? Because if it doesn't change your life, you're probably not going to be motivated to pursue it because why would you?

And then if it's going to change your life, what does that change look like? Does it mean I can get the car of my dreams, let's say? I used to do this back in the beginning when I first got into this, I would say, "Write down what your goals are, but write down what you're going to do and how you're going to reward yourself if you accomplish those goals."

I once heard the story of a guy, I think he was a businessman up in the Bay Area. And this guy, he was very goal oriented and he had a business coach. And there was one particular year where they're in the last quarter of the year, it didn't look like he was going to hit his goal. But he was talking to his business coach about it, he says, "I really need to jump start the last quarter of this year because I really want to hit my goal." So, his business coach says, "Well, what do you want to reward yourself with?"

And he thinks for a minute and he said, "I don't know. I've been eyeballing the new Maserati." And the coach says, "Okay, great, you hit this goal, go and buy the Maserati. But what I want you to do is, I want you to go out and I want you to find a picture of the car you want and put it on your refrigerator." So, he puts it on his refrigerator and then he goes to work and over the last quarter he doubles his efforts, he does the work. And long and short of it is, he hits his goal.

So, he's in San Francisco, goes into the Maserati dealership. He has a red Maserati, by the way, on his refrigerator, he's been looking at every single day. He goes to the Maserati dealership in San Francisco, and all the

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

Maseratis are silver. And he's like, "Well, where are the red ones?" He's like, "Well, we don't have any red ones. You've got to go to LA for that." Now, he had had the cover of, again, *Road and Track Magazine* on his refrigerator, red Maserati.

He goes to Los Angeles, to the Maserati dealership in Los Angeles, in the showroom is a red Maserati. So, he goes to the salesman and says, "That's just what I've been looking for. I want to talk about buying this car." They sit down, the Salesman says, "We're prepared to offer you a discount for this car because it's got a few miles on it. You see, a few months back *Road and Track Magazine* used it for its cover story." So, he didn't just get a red Maserati. He got the red Maserati he had been looking at on his refrigerator.

So that's a great story about the power of having some sort of visual stimulus that really lights a fire in you and it's amazing what that kind of thing can do when it comes to hitting goals.

John: Well, and it doesn't all have to be personal goals. I mean, there is always going to be a component of that, but for me, I'm speaking for myself. A big part of why I do what I do is, I'm trying to help lawyers improve their practices because I believe in helping close the access to justice gap. And I've got this very, almost Pollyannaish idea that if I can help more lawyers be more efficient and more effective in running their practices, then that's going to improve the affordability for legal services for the general population.

And I don't necessarily have a great way, I mean, there are ways to measure that. So, it's not a great way to measure my contribution to that because the access to justice gap is so giant. But it's meaningful to me as people work through what I do and learn from the tools and techniques that I have, that they do expand their practices, that they are sort of giving back to their own communities and that helps.

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

Mike: And I just realized I sounded like the materialistic guy. I didn't mean to sound like that because I agree with you. I think that we have to decide what is truly fulfilling. And the odd thing is, it's generally not a new car or a Rolex. It's generally what we bring to the world, how we serve other people, how we take care of those and help those in our family and closest to us. So, it's generally that stuff, but again, you really have to, if I'm building something, I want to know how is it going to change things for me, what will my life look like if I do this?

John: Yeah. Well, and I will also admit that I've got my eye on a new model Toyota Land Cruiser that's going to get me up into trout streams and the cascades of Oregon. So, you can do both, it doesn't have to be an either or.

Mike: I don't know if I'm diving down a rabbit hole here or not. But we used to ask people, and I think this is an important question for every business owner to ask themselves. And to be honest about it, we used to ask people this question, what's important to you about money? And everybody would give the answers that they thought they were supposed to give. Which meant that everybody who answers that question is lying, and they don't know it.

There's only one guy that I've ever asked that question, who gave what I thought was an honest answer because I asked him, "What's important to you about money?" And he said, "I like the way it makes me look in the world." I thought that's honest, because if you think about it, there's no practical reason whatsoever to own a Rolex. There's only one reason to own it, because it looks good in the world. All I'm saying is, if that's your answer, there's nothing wrong with that. The same way there's nothing wrong with wanting a Land Cruiser that'll get you up into, or whatever.

The point is, be honest with yourself about what it is. I don't know who said this, but somebody once said that we use our intellect to justify decisions

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

our emotions have already made, And so we can get there. That forms the basis for doing the work, because all of this is work and it's change.

John: Yeah. Well, and there's a couple other things and I'm going to pull from maybe a couple of different parts of your book. And in the early going, you really clearly talk about building firms for the long haul. And this idea that, and I think it's especially true when you are a professional, that there's a lifetime to your practice, a lifecycle to the practice. And ideally you would build it in order to be durable and sustainable and improving over the course of that lifecycle.

And then if you're lucky, you might even have developed something that is a transferable asset at the end of it. So, you can have some sort of exit, although that's often really challenging for lawyers and legal firms. You also talk about entrepreneurs needing to focus on a balanced life. And I'm hoping you can talk a little bit about what it's like and what maybe the mindset should be or what is helpful at least, maybe not what it should be, in terms of balancing that long view, balancing that need for personal balance with the ideas of, look, sometimes this is just a ton of work.

You're wearing multiple hats. If you're just starting out, you've got all these different roles. It seems like you could never go to bed, it's hard to find days where you reach the bottom of your to-do list and you say, "Okay, great, I'm going to shut the book on today and move forward into the next one." So where have you found success and then in terms of working with other professionals, where do they find success in achieving that balance?

Mike: Well, first of all, the operative word there is balance. Let me put it in fitness terms. I listened to a podcast once with LeBron James and his trainer. And they talked about the importance of recovery. LeBron spends as much time recovering, in other words, he spends as much time resting and not working out as he does working out because they understand the importance of that balance. So, the balance really is the idea of just

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

recharging your batteries because you'll ultimately be more effective, at least I've found that to be true.

Some of the biggest years I've had are years when I had a whole lot of other stuff going on outside the business that required my attention, but I also discovered balance. So, it's super important, it's the old idea of, if you're chopping wood you've got to sharpen the axe. So, I think things like reading is super important. You've got to fill your head with something. You've got to fill your head with ideas that aren't yours, other people's.

I think physical fitness, taking care of your body in some form is super important and the basics, food and sleep and all, just sort of a basic balanced life. And then spending time with the people that matter. I think the focus of the book really is, one of them at least is, how do you devote time to the things that really do matter and will meaningfully move you forward. We talk about good growth versus bad growth.

Bad growth just makes you busier, it just sucks time. It doesn't necessarily make you any more money, it just makes you busier. But good growth moves you further on down the line and also allows you to maintain the balance, so I think that's what we're talking about.

John: Yeah. No, it makes sense to me. And a while back, I did an episode about the fact that we have a lawyer shortage in the United States and I think globally, that's pretty consistent in a lot of other places.

Mike: We have a lawyer shortage, wow, okay.

John: Yeah, okay. So, I get that a lot. And there are, and I won't dive deep into it here, but there are, especially when it comes to meeting the needs of individuals. So, the reality is, over the last 50 years, the bulk of the legal services market has shifted into meeting the needs of corporations and big businesses and away from meeting the needs of individuals. And so, in terms of your friends, your neighbors, your family, their ability to hire and to

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

even find, much less higher and pay for meaningful legal help is a lot harder now than it was 50 years ago.

And for families and people that don't come from any sort of means and that includes a big chunk of the middle class. I mean, I hear all the time from lawyers that, "I wouldn't be able to afford me." They're running their practice in a way and they're making money from the clients they have, but they themselves as being middle class, can't quite get there. The side-effect of that is that the demand for most lawyer services is effectively bottomless.

And there's market forces that will then encourage you to take yourself upmarket, but because people's defaults, and where I'm going with this is coming back to this idea of defining who is your right client. Because I think that there is a default when you start a business, when you own a business, you want to just keep taking work. And there's this notion that all work is worthwhile work.

But in a world where the demand for your help outpaces your capacity to deliver that help, you get to be discerning. And there's a few different ways to be discerning, one is to put yourself out to the highest bidder, which is, move yourself upmarket in terms of your fees, and that's okay. If you want the Maserati, that might be a good way to do it.

But another way to do it is to be more discerning in terms of, how do you attract people? And part of where I'm going with this is coming back to this notion of how do you articulate a value proposition for a professional services firm. And really being clear that I am the right lawyer, I'm the right professional for people like this.

Mike: As you were talking, it occurred to me, this all just kind of happens in stages. First and foremost, when you're starting out, you'll take anybody with a pulse. But then as you get further into it, you get to be a little bit more

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

discerning as you mentioned. And then you get to the point where you're kind of saturated with that and you've got to take yourself out of your own universe, out of being the center of your own universe and that generally is about systems and processes and working with other professionals.

That's the other thing we're big on in the book. Nobody does it all. So, we have to start playing this really as a team sport. And I think ultimately that's where we all have to end up. We have to rely on each other's expertise to solve a wider array of problems for the people that we work with. But first and foremost, it's all about not what we understand about what we do, but what do we understand about the people we're talking to and what's important to them.

I've worked with and outsourced a lot of work to many, many attorneys over the course of my career, some of them are good people, people, some of them aren't. And I always wonder, well, what did the client retain from that interaction? So, look, the more that we understand about the people we work for and what's important to them, the more we'll be attuned to the problems that we need to help them solve. I think that's the whole key to it.

John: Yeah. No, that makes a lot of sense to me and pretty consistent with my approach and I think with a lot of the folks that I work with too. No, it's helpful. And part of it, I'm remembering, as I was Googling out about you, around about you, I came across your sort of get to know your video on your website. And one of the things that you do in that video is draw a distinction between being not just an advisor, and instead you see yourself as a financial coach. And I'd love for you to tell me a little bit more about what you mean by that.

Mike: Well, it's like a doctor-patient relationship, I guess. I mean I have a doctor and my doctor runs tests on me and does the things that doctors do. But the lion's share of the responsibility for my physical health falls on my shoulders. I think that's what the coaching relationship is all about. We

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

focus at our firm, for example, on financial planning, which is an illustration of one's future, basically. Where is your financial future headed? And is it headed to somewhere that you want to go?

But along the way I've worked with some people who seem to be sabotaging that success for various reasons. And I have to say to them, "Look, I'm not going to tell you what to do with your own money." And I'm not, by the way, I've always considered an advisor's job isn't to tell somebody what to do. It's to give you what the likely outcome is of certain decisions, so that if you want to make different decisions, you can make different decisions. Because if you don't like where the road leads, maybe we can course correct a little bit. That's my job.

So, I have to tell people who are sabotaging their own success, that the success that they ultimately seek won't happen because what they're doing is unsustainable. So, you've got to have conversations like that. It means having sometimes the tough conversations like, "Look, this won't end up anywhere good or this adjustment has to be made." The most sensitive area, honestly, is the family stuff. We're talking to people about, "Your financial plan would work really good if you weren't giving so much money to your kids."

I've got to be careful there because I have to say, "Look, you do what you want because honestly, it's your money and you can do what you want. I'm just here to tell you where the road meets." So, the coaching relationship, and by the way, that relationship doesn't show up immediately, it's earned. I can't do that with somebody who just became a client. But if we're seeing our clients a lot and we do, then we're going to get to know them. They're going to begin to trust us more. They're going to be going to talk to us about more and more things.

I know things about some of my clients that their spouses don't know. When we get to those levels of trust, yeah, then I can be a lot more

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

forthright and honest about what works. And so that's really what we're talking about. It's a confidante coach relationship.

John: Yeah, it's interesting, I can't remember if I've told this story on the podcast or not. I've told it to some of my clients, but I coached my kids in soccer for years, I'd spent 10 years and was not a soccer player myself. Did the whole thing where all I had to do was no more than a kindergartener when I first started out. But I got some really great feedback from an opposing coach after a game one time, where I had a very directive coaching style in my early playing.

And this other coach, who I still see around sometimes as we have kids the same age, he said. "Do you mind if I give you some feedback?" And I said, "Yeah, please." And he said, "You're being a remote control coach." I said, "What do you mean?" He said, "Well, you're just telling them what to do and you're trying to be on the field through them." And what he said is, "Think about spending way less time telling your players what you would do and help them to learn how to see what you see."

And it was very profound, both in my obviously youth coaching career, but I've taken that to heart in my professional coaching as well. I think that's a big part of it.

Mike: Yeah. I'm an avid tennis player and have been my whole life. And I was listening to, I can never pronounce the guy's name. His name is Patrick and I think it's Mouratoglou, whatever. He coached Serena Williams. He coached a lot of great, he's one of the most renowned tennis coaches out there. Pursuing goals is an interesting thing and he was saying, "Winning and losing shouldn't be a goal." He said, "Your goals are about the things you can control, and you probably shouldn't have more than two or three of them because you can't assimilate more than two or three of them while the whole thing's going on."

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

I kind of changed a little bit on that with regard to my business goals, yeah, I have a number in mind. I have a certain old business composition goal in mind, how we want to grow the firm and all that stuff. But those aren't my goals. My goal is to every day do certain things with great consistency. They just happen to be the things that I know will drive that result a little better. So, I think that was a really, really important point because I can control that stuff. I can't control the outcome necessarily. And so, I think that's a little bit of what you were talking about.

John: Yeah. No, I think that's right. I want to switch gears back because you mentioned a little while ago this idea around policies and procedures and systems as being sort of a key point to enabling sort of the growth. But also, I talk a lot in my practice about the need for consistency and predictability. And even when it comes to the delivery of legal services, there's this assumption that what people want is speed, but what they really want, I think, is predictability.

Speed is nice sometimes, but as long as they know what things are going to look like, then speed isn't as important as understanding, okay, great, I can expect it in three weeks, and that's normal. You get a reservation at a fancy restaurant, you don't expect, unless you're Serena Williams, you don't expect to walk in the door.

Mike: It's interesting you use that example because I live in an area where there's a new restaurant on every block. And so, if you live here, you kind of do the dining out thing a lot because it's what you do when you live here. And what's interesting is all the restaurants are good, but it's rare that you go to one, especially the high end restaurants, that you want to go back to. And that generally is about whether or not they get you. So, there are a lot of professionals out there, they're good at what they do, but I don't think that's what most people are looking for.

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

They're looking for, do they get me? And if they get me, expediency is important, but it's not the most important thing. Everybody wants to feel understood. Insert Maya Angelou quote, "People won't remember what you said, but they will always remember how you made them feel." And it's very possible as a professional to come way fixated on what you know, how impressive you are, how impressive your firm is, whatever. None of that stuff matters to the person you're talking to.

What matters to them is the same thing that matters to that person at the high end restaurant. Do they get me? I know the avocado toast is wonderful, I don't care. I want to know if they understand me. And that's the whole key to it.

John: Yeah, that resonates with a lot of my experience as well. I want to come back though, so I hit on this topic around systems and policies and I actually did an episode a few months ago around what I think makes a good law firm policy. But from your point of view, what are the elements of a good policy? I guess what's a policy even for and then what are the things that a professional can put?

Assuming you know or have some idea about how different parts of your practice should be running, how do you communicate that to other people, or even to your future self in a way that is going to allow you to do it consistently?

Mike: Well, I was feeling bad a second ago because I felt like I went off on a tangent. But I don't know that I really did because taking care of clients or customers in that way where they feel like you understand them is to a certain extent about systems and policy and processes. For example, if you have a policy, which we do that we return emails and phone calls within 24 hours, that means something. It means that if our policy is, we are transparent, say in our fee structuring, means something to people.

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

It's cumulatively all of these little things that in and of themselves might not matter, but together they matter a lot. And it's the same thing if a restaurant has a policy, you don't let somebody be at the table longer than five minutes before somebody's showing up there and saying, "Do you want this or that or do you need water", or whatever. Again, there is the foundation to this. So, I think first and foremost, it's about observing the basics when it comes to what people really care about.

Then it's about, I think, what does the deeper dive look like or questions? What is our process for intake and what questions are we asking about? How do we tell our own story? I mean, our own story really shouldn't supersede theirs, but we have to be good at telling our story of who we are, why we do what we do, all that stuff. And we want to be as relatable as possible. I think we're living in a time where nobody likes to be sold. So, it's not a spiel, it's not a presentation, it's not a pitch.

And I've seen this over and over again. I was guilty of it too. I wanted to make sure I got my presentation right and didn't really matter. I think more than ever, particularly with the remote world that we now live in, the virtual world that we now live in, you'll find that clients really want substance. They want to touch something real. So, if we're asking questions and trying to probe and find out who they are, why do you feel that way? Why did you do that? What's important to you? All that stuff. That's all about process and it really is all about systems. It might not look like that, but that's what it is.

John: Well, and part of what I'm hearing is that the key to a good policy is that you need to understand what is the value statement that you're bringing, that underpins that policy? What's the why? How I articulated it a few months ago was, a good policy should start with a why statement. Why we have this policy and understanding what it is. But I think you're going a level deeper than that, which I like.

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

And again, one of the things I talk about with my clients a lot, there was this super nerdy book that I read when I was first starting doing consulting and coaching for lawyers called, *Towards an Anthropological Theory of Value* by a guy named David Graeber. And I never finished the book. It was really dense. But one of the things that he talks about that really resonated with me is this idea that in many, many of the world's languages, we use the same word to discuss our personal values as we use to discuss economic value, and that's not coincidence.

And so, when we talk about people not wanting to be sold, what we want is people to connect with us on the things that we value because we find economic value in that. And we will trade some of our economic currency in order to engage in relationships that touch our values in other ways.

Mike: Yeah, I think that's totally true. I know that if I'm doing business with anybody, that's what I'm looking for, who's listening and who's connecting with me in a way you just described? And I think the other part of it and we talk about this in the book as well, is the idea of edifying other people. The idea that we realize we can't do it all and we need to be working in teams. And I need to be talking if you're on my team. I need to be talking to people about what a great job you do, what great work you do and how much I trust you and how much I've had a good experience working with you.

It can't be, I know someone who does that. It's got to be, I have to set you up to win because if I do that, I enhance my own value proposition. I don't know why I seldom see professionals doing this.

John: Yeah, and that gets me to the last couple of questions I wanted to ask you about. And again, as I mentioned before we hit the record button, one of the things that I've observed about lawyers is that they're lousy at getting feedback. And I don't think that's just lawyers. Getting feedback is hard. And I kind of wanted to take this opportunity to ask your feedback as someone who's not a lawyer around two different areas.

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

And I'm going to start with your experience, hiring lawyers, and I assume you've at least hired lawyers from a business standpoint and you've probably done some estate planning since that often is something that financial advisors are big on anyway and you can't do it yourself. I won't pry about whether you've engaged lawyers for other purposes or not, but in your use of lawyers as professionals, what are the things that good lawyers do that you notice, and you say, "This person gets it?"

Mike: Look, my answer is exceedingly simple. They listen. They listen more than they talk. They're inquisitive and they're forthcoming. And they're forthcoming, by the way, about who they are, who they work well with and who they don't work well with. Those are the good ones, they're listening, they're educating. I mean, we have a mantra at our firm, educate and step back. They're educating, they're teaching. The good ones, that's what they do.

Look, I will concede, and you're right, I have hired lawyers for my own, for both business and personal. And also, I have outsourced a lot of work to trust lawyers, people like that, and so I've seen it all, I feel. And the other part of it is, they do what they say they're going to do. I mean, one of the mantras in our firm, I think everybody should have this, don't ever, ever under any circumstances say you're going to do something and not do it, just don't go there.

But follow through is extremely important and unfortunately some lawyers don't follow through very well. So, it really is about the interaction and understanding that they kind of want to hire you. They don't want to go talk to another lawyer. So, give them a reason to hire you by listening to them and educating them because that's what they want. They want to understand this. They will not during the conversation like they do, they don't.

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

John: Yeah. Well, and so I did, you kind of jumped on the second question. But as someone that I think probably refers quite a bit of work to lawyers, let me actually start with this which is different from, you kind of answered my second question already. But how would a lawyer that is new to you even go about getting on your radar and say, "Hey, Mike, I'm looking for referrals, I want you to refer people to me." What's the best way to, I guess, get your attention and then engage with you and give you the confidence that, okay, I might try this person out?

Mike: Well, first and foremost there has to be space somewhere for them to exist, meaning am I looking for somebody who has their particular specialty and skill set, that's number one. And am I looking for somebody who prices their solutions like they do, because you always have all kinds of people on your roster, the elephant hunters. You have the, I don't know, let's call it the platinum, the gold and the silver. So there has to be space for them to exist.

Then it just becomes, I want to know how you interact with people. What does your process look like? I want to know what I'm going to get if I refer somebody. But for me, even if it goes a step further and I'm willing to give them a try and refer them to somebody, I'm sitting in on at least the first meeting, if not the second meeting. So, it's my client. I'm going to be there. This happens on my watch. So, I'm going to watch what's going down because I want to know what this client's going to get. So, there's a kind of a probationary thing that happens.

John: I like that. And so, then the last thing I'm going to hit on and this is kind of going back to one of the pieces that was in your book, because in sort of the middle part, I think it's Section 5, you talk about organizing for success. And you draw a little bit of a distinction between a policy and a success manual. And I'm wondering if you could maybe, as we roll out, tell me what a success manual is and how you use them, and I guess, who are the different audiences for success manuals in your practice?

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

Mike: Well, we've written several and first of all, we have a client success manual. And what that is, it's sort of, when we onboard new clients, we take them on a tour through the firm. That's what it allows for, here are your founders. Here is how we do what we do. Here who's involved. We want them to see that it's a pretty large team that works on their behalf, whether they see it or not. So, the client success manual really outlines that and it's everything about us and it's available to every client. They can look at it whenever they want because it's on their client portal.

John: And probably a little bit about your process too, what are the stages of the work.

Mike: Totally. It totally outlines how we do things. Then there's an advisor success manual. When we bring on new advisors, we really outlined the way they can become successful if they'll do certain things.

John: And these are employees inside your practice?

Mike: Well, either that or advisors that join the practice.

John: Okay, got it.

Mike: But we're really outlining the things that we feel are necessary to the growth of an advisor's practice. So principally, whenever we use a manual, that's what we're trying, it's a map really. It's anatomy and a map. This is what it looks like. So, it's the view from 10,000 feet.

John: Love it. Well, great, well, if any of the listeners to this podcast want to reach out to you, what's the best way to connect with you, learn more about what you do, find your book, etc.?

Mike: Well, the book is available on Amazon, so shameless plug time.

John: As they all are.

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

Mike: As they all are, but ours is too. And so, our web address is protectionpointadvisors.com. And you can go to info@protectionpointadvisors.com, ask a question, request a consultation if need be. We also hold at least one live event every single month. If you go to our website, you can go to the events tab and click on events and you can register. It's a town hall style format that has worked really well for us. People ask questions. We're always kind of talking about the things that we hope are on people's minds.

We'll, I'm sure, at some point, talk about the upcoming election and whether that really matters to the markets. Spoiler alert, it doesn't. But we'll talk about stuff like that. And so, yeah, a lot of different ways that you can reach out to me and we're happy to talk to anyone.

John: Right. Well, thank you so much for coming on the podcast and this was great, really, really fun conversation.

Mike: Yeah, it was great talking to you, thanks.

John: Alright.

Thanks for listening to *The Agile Attorney* podcast. I'm your host, John Grant. If you found today's episode interesting or useful, please share it with someone who you think would benefit from a more agile approach to their legal practice. If you have any questions, feedback or maybe a topic you'd like to hear me cover, you can reach me at john.grant@agileattorney.com.

To help other attorneys and legal professionals discover this podcast, it helps a lot if you could rate or review me on Apple Podcasts or Spotify. And of course, be sure to subscribe in your favorite podcast app. This podcast gets production support from the fantastic team at Digital Freedom Productions and our theme song is the instrumental version of Hello by

Ep #32: Organize Your Law Practice for Business Success with Michael Clarke

Lunareh. That's it for today's episode. Thank you for listening and see you next time.