

Lessons from a First Year Solo

Last year, I hung out the proverbial shingle. For the previous four years, I had been out of the professional work force as a stay at home mom. Although I had worked as an attorney in the past, upon my return, I decided to devote my practice to an area of law that I had not formerly worked in as a professional. As the lawyer in the family, I had drafted a few wills, but this would be a completely new endeavor. To paraphrase our colleague, Merrell Bailey, I would be learning to "drive the car at the same time I was building it." This past year, I have had a continuous feeling of "flying by the seat of my pants"; however, I am pleased to say that I am still driving this wonderful car and it is still under construction. Here is some "sage" advice from a new solo practitioner/entrepreneur.

1) "SOLO" DOES NOT MEAN "ALONE". Despite all the jokes about us, we belong to a profession of predominantly nice people. When you think about it, we earn our living helping people, so it would make sense that when I asked for help from more experienced practitioners, I would receive it. I have found various professional list serves, bar association committee meetings, and an endless array of CLE programs to be great ways to study a new practice area. When faced with practical application of a statute, for example, I have called the SCOPE program through the Florida Bar, other more seasoned attorneys in the area and co-counseled with more experienced practitioners. When clients learned that they were getting two lawyers for the price of one, they didn't seem to mind and appreciated the value for their dollar. Additionally, the CFAWL mentoring program has been very helpful. Although my mentor does not practice in my area of law, she does have experience to share as a working mother and solo practitioner. Finally, a few of us new solos also got together and formed a close group that meets monthly to discuss particular issues in our practice area as they arise.

2) IT IS IMPORTANT TO INVEST IN TOOLS OF THE TRADE, BUT DON'T LET THE REVIEW PE-**RIOD EXPIRE.** It was a challenge learning which materials, subscriptions and professional software I needed to run my practice. In truth, last year was much more expensive than I had anticipated. To someone just starting out, I would strongly recommend making use of the 30 day review periods that are offered on most software and books. I found that learning to drive the car and assembling it at the same time lent itself to overlooking that particular detail at times. Suffice to say, the budget is tighter for this year and I have learned which software programs are duplicative. Hopefully, this year my tool chest will be what I need and not too much more.

3) A LAW FIRM IS A BUSINESS. It

is one thing to practice law; but quite another to run a business. Having no prior experience in running a business, apart from childhood lemonade sales, I enlisted the help of a professional business coach. I have also utilized the counseling services provided by the Small Business Development Center at the University of Central Florida. This combination of advisors has opened up a whole new world of business education. Meeting with others members of our legal community who have also "gone out on their own" has undoubtedly provided valuable insights and recommendations.

4) THE ATTORNEY REFERRAL PROGRAM HELPED ME SUR-VIVE MY FIRST YEAR. In our county, the bar association runs the attorney referral program. For a small annual fee, I joined the list of attorneys in the program. While some of the referrals did not result in paying cases, the ones that did were good cases and some led to repeat business. I am grateful to the program and

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Message from the Chair



What a year this has been! The General Practice, Solo and Small Firm Section of the Florida Bar continues to make great

progress. None of this could have been accomplished without you—our membership. We exist to support your efforts in providing quality legal services as a solo or small firm practitioner. We aren't your typical Bar Section. We don't offer substantive law topics, other than our traditional Florida Law Update. Our goal is to discover and then meet the needs of our members. Our CLE programs, as a result, focus on the day-to-day challenges faced by solo and small firm practitioners; hiring a good team, managing your time (and technology), practicing ethically, and staying sane, just to name a few.

What we heard you say was you wanted guidance regarding the challenges of being (or going) solo. Sometimes solo is a choice, sometimes it's a necessity. At one time, now eleven years ago, I made the decision to go solo. I did this knowing I really didn't want to practice alone. However, I did want the autonomy to design and control my own future, right or wrong. Fortunately, I'm still here and thriving. My partner and I owe much of our success to the fine people and organizations that supported us during those tentative early years when the learning curve was still steep. This is not a journey to take alone. You can be in practice for yourself, but you don't have to be in practice by yourself. Come along with us.

We invite you to join us for 2010-2011 and everything that lies ahead. We welcome incoming chair Kirk

Kirkconnell, who has served this Bar for many years and is an excellent leader and mentor. Under his guidance and tutelage, the Section will certainly accomplish great things. Our book project, 101 Helpful Hints for Solo and Small Firm Practitioners is still alive and well. The 2011 Solo and Small Firm Conference should be the best one ever (each subsequent year is!) Our commitment to improving our website and communication abilities with our members continues—look for more on that front. Don't forget to check out our upcoming out-of-country CLE trip for fun and education in one package. Innovative education focused on ethics, technology and practice management are our goals. We welcome your participation and your suggestions.

Let's have a great year!

Peggy Hoyt, Chair 2009-2010



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<u>2010 Solo and Small Firm Conference</u> Everything You Need to Know to be a Successful Attorney You Learned in Kindergarten

Do you know where you were March 26 & 27, 2010? If you were not at the Solo and Small Firm Conference at the Rosen Plaza Hotel in Orlando, then you missed an educational, thought provoking and, yes, fun conference (plus 11 CLEs). As one speaker's presentation title indicated, "having fun and being a successful lawyer is not an oxymoron." You also missed networking with great people who are willing to share their practice tips on managing a small firm or going solo in these challenging times. So, when you see the announcement for the 2011 conference, please place it on your calendar and make plans to attend.

A large part of this conference includes the networking with colleagues. **Jack Bettman** always does a great job of initiating the interaction by dividing attendees into groups as they register and providing a list of questions to answer (by interacting with more colleagues). The prize money is provided by Mr. Bettman. Thank you, Jack!

The success of this year's conference can be attributed to two groups. The first group is the faculty and steering committee, which included **Teresa Byrd Morgan, Richard Al**len, Laney Lyons-Chavis, Judith Equels, Julie Fleming, Linda Calvert Hanson, Margaret "Peggy" Hoyt, Kevin Johnson, Susan Cartier Liebel, Daniel Perry, Steve Riley, Eugene "Gene" Shuey, Molly Hall, and Stephanie West Allen.

The GPSSF extends a special thanks to four of the above speakers, as they also provided some very special and useful prizes to attendees. These included:

• Susan Cartier-Liebel provided a one-year scholarship to Solo Practice University.

• Laney Lyons-Chavis and Molly Hall provided a 30-day coaching package for team members called the Ultimate Smart Solution Jump Start Package

• Julie Fleming provided a free membership to Lawyers Business Development Bootcamp, which includes five 90-minute group teleconferences in which Julie will deliver information on aspects of business development including creating a plan, networking and following up, writing and speaking that gets results, asking for the business, and social media for lawyers. Also included in this membership is a copy of The Reluctant Rainmaker: A Guide for Lawyers Who Hate Selling and the multimedia program The Five Foundations of Time Mastery for Attorneys.

The second group who made the conference a success is composed of the sponsors and exhibitors. We want to thank them for their generosity and extend our appreciation of their support for the conference and the GPSSF. Thank you!

Lunch, reception (including DJ), breakfasts and break sponsors included:

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2009 Handbook of Employment Regulations Affecting Florida Farm Employers and Workers

by Fritz Roka, Michael Olexa, Katherine Smallwood, Leo Polopolus, and Carol Fountain

This handbook is intended to provide a convenient reference to the major provisions of the several state and federal regulations that affect farm employers and employees. It reflects state and federal laws as of July 1, 2009, only as they apply to farmworkers and not to workers considered nonagricultural. Its purpose is simply to focus employers and employees on the fundamental provisions of the laws which govern their relationships.

For the purposes of this handbook, the definition of *farmworker* is taken from the United States Department of Labor's Bureau of Labor Statistics' Occupational Outlook Handbook for 2008-09 (http://data.bls.gov/cgi-bin/ print.pl/oco/ocos285.htm). A farm or agricultural worker (farmworker) is one who is paid for work performed on crop and/or livestock operations. Farmworkers may work for piece rates or be paid an hourly wage. Farmworkers may work part-time, seasonally, or full-time. They may perform manual labor, operate equipment, or supervise other farm personnel.

The handbook is divided into sections to cover specific labor laws and regulations. The online EDIS version allows a reader to *hyperlink* to the EDIS document discussing the particular issue of interest (http://edis.ifas. ufl.edu, documents FE390–FE423). Note that documents are categorized by subject and by jurisdiction (state and federal). Given the nature of government bureaucracy and the subject of labor law, many acronyms are used by professionals with the labor law community, and a list of commonly used acronyms can be found at http:// edis.ifas.ufl.edu/fe390.

The Handbook of Employment Regulations Affecting Florida Farm Employers and Workers does not and should not substitute for specific technical advice from responsible state and federal agencies, knowledgeable grower associations, legal agencies, or other experts in the agricultural labor law field. This handbook makes no attempt to cover all aspects of specialized agricultural labor and safety law (e.g., logging and/or forestry operations).

This handbook is distributed with the understanding that the authors are not engaged in rendering legal or other professional advice and the information contained in this handbook should not be regarded or relied upon as a substitute for professional advice. This handbook is not all-inclusive in providing information to achieve compliance with laws and regulations governing the practice of agriculture. For these reasons, the use of these materials by any person constitutes an agreement to hold harmless the authors, contributors to the handbook, the Institute of Food and Agricultural Sciences, and the University of Florida for any liability claims, damages, or expenses that may be incurred by any person as a result of reference to or reliance on the information contained in this handbook.

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Fritz Roka, associate professor, Michael Olexa, professor, Leo Polopolus, professor emeritus, and Carol Fountain, editor, are members of the Food and Resource Economics Department, University of Florida, Gainesville, FL. Katherine Smallwood is a student with the Levin College of Law, University of Florida, Gainesville, FL.

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Creating The Trial Notebook by Priscilla Horn, CP, FRP

There are probably as many different ways to prepare a trial notebook as there are ways to research case law.

I think the hardest part of preparing the Trial Notebook is incorporating the Order of Proof (or How to Tell Your Story) in a cohesive manner. One of the easiest and most effective ways to approach this complex issue is to rethink the process. Tilt the prism. Pretend you are writing the Great American Novel.

Remember, you are trying to convince a jury of your peers (who usually have very little knowledge of The Law) to evaluate your client's set of circumstances. You also want them to consider the evidence presented in the most favorable light for your client to WIN THE CASE.

Most novelists engage the reader by addressing their hero/heroine's Goals, Motivation, and Conflict. Every worthwhile plot will encompass these key elements very early in the story - usually in the first three pages. The premise for that being, if the reader is not interested in what will happen next, their mind will wander off in another direction to think about something more interesting. YOUR JOB in creating the ideal trial notebook is like writing that novel. You need to find a way to keep the jury interested IN YOUR SIDE of the case. This can be done with visual aids, dramatic opening statements, and the order (lineup) of witnesses who tell the jury about the case. Corroborating the story and the facts presented is the reason for the Trial Notebook.

Try to keep the Trial Notebook as compact as possible. One large 3-ring binder is recommended. The following is a sample Table of Contents:

1. Opening Statement

2. Order of Proof

3. Key Pleadings (Complaint, Answer, Affirmative Defenses)

4. Key Witness Deposition Summaries (one-page summaries outlining page numbers for pertinent facts)

5. Answers to Interrogatories

6. Responses to Request for Production (highlight key exhibits) 7. Responses to Requests for Admission

8. Pre-Trial Stipulations (both sides)

9. Motions in Limine

10. Research/Case Law

11. Summary of Damages

12. Offers of Judgment/Settlement Proposals

13. Closing Argument

14. Jury Instructions/Verdict Forms/Voir Dire

The above information can be arranged in the manner easiest to use during trial. Just label the dividers for the separate tabs (color-coding the tabs if that works for you), and put the necessary documents inside the tabbed dividers of the 3-ring binder for quick access.

You may want to do a "rehearsal" in your office to make sure all the information you need is readily available in the Trial Notebook. (Also include a zip-lock plastic bag containing a supply of yellow post-it notes, paper clips, and extra notepads/pens/pencils to take with you to the trial.)

One more thing: Keep a separate list of ALL witness telephone numbers, and a fully-charged cellphone for use at a moment's notice.

If you have any questions or comments regarding this article, please contact: Priscilla Horn, CP, FRP, 6570 51st Avenue, Vero Beach, FL 32967, Email: pris2323@yahoo.com.



Support Legal Representation for Florida's Children

Go to your local county tag office to purchase a KIDS DESERVE JUSTICE specialty license plate, an authorized Florida automobile license plate.

• Generates tax-deductible contributions to provide legal assistance to needy Florida children. The \$25 donation for each plate will go to The Florida Bar Foundation, a §501(c)(3) public charity.The Foundation will grant 100% of the funds to provide legal assistance to needy children.

• Grants to local legal aid organizations to provide direct legal assistance to needy children will be the priority. Additionally, the funds can be used, for example, to train pro bono lawyers to represent needy children, or work with the courts and other groups on ways the courts and broader justice system can better serve the legal needs of children.

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Press Release

For Immediate Release

Contact: Dennis Maggi 949.752.1801 dmaggi@actl.com

ATTORNEY ADMITTED TO AMERICAN COLLEGE OF TRIAL LAWYERS

Kirk N. Kirkconnell of Winter Park, Florida has become a Fellow of the American College of Trial Lawyers, one of the premier legal associations in America.

Founded in 1950, the College is composed of the trial bar from the United States and Canada. Fellowship in the College is extended by invitation only, and only after careful investigation, to those experienced trial lawyers who have mastered the art of advocacy and whose professional careers have been marked by the highest standards of ethical conduct, professionalism, civility and collegiality. Lawyers must have a minimum of fifteen years trial experience before they can be considered Membership in the College cannot exceed one percent of the total lawyer population of any state or province.

Kirk N. Kirkconnell is a partner in the criminal defense firm of Kirkconnell, Lindsey, Snure, Yates & Ponall, P.A., and has been practicing in this city for 38 years. He graduated from the University of Florida College of Law in 1968. He has served on the Board of Governors of the Florida Bar, and is a past president of the Florida Association of Criminal Defense Lawyers. He currently serves on the Judicial Nominating Commission of the Fifth District Court of Appeal, who recommends judicial candidates to the Governor for appellate judgeships. Kirk N. Kirkconnell is board certified by the Florida Bar and the National Board of Trial Attorneys as a Criminal Trial Advocate. Contact Information:

> Kirk N. Kirkconnell Kirkconnell, Lindsey, Snure, Yates & Ponall, P.A. 1150 Louisiana Avenue, Suite 1, P.O. Box 2728 Winter Park, FL 32790 Telephone: (407)644-7600 e-mail: <u>kirkconnellk@criminaldefenselaw.com</u>

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<u>Contact Info:</u> The Law Office of Hoyt & Bryan, LLC 254 Plaza Drive Oviedo, FL 32765 <u>http://www.hoytbryan.com</u>

Phone: 407-977-8080 Fax: 407-977-8078

<u>About:</u> The Law Offices of Hoyt & Bryan serves the needs of families for estate planning, elder law, estate administration, guardianship, real estate and small business issues. Contact info is below.

Morgan Law Center (D.J. for Friday Reception)

Contact to be listed: Teresa Byrd Morgan tbyrd@morganlawcenter.com

<u>Contact Info:</u> Morgan Law Center 234 Duval St. Lake City, FL 32055-4085 <u>http://www.morganlawcenter.com</u>

Phone: 386-755-1977 Fax: 386-755-8781

<u>About:</u> Morgan Law Center for Estate and Legacy Planning is a law firm that focuses on estate legacy and business planning, probate and trust administration, and asset protection.

Kirkconnell Lindsey Snure & Yates, P.A.

(\$750 Sponsorship of Saturday breakfast)

<u>Contact to be listed:</u> Kirk Kirkconnell <u>kirkconnell@criminaldefenselaw.com</u>

<u>Contact Info:</u> 1150 Louisiana Avenue, Suite 1 P.O. Box 2728 Winter Park, FL 32790-2728 www.criminaldefelselaw.com

Phone: 407-644-7600 Fax: 407-645-0805

<u>About:</u> Kirkconnell, Lindsey, Snure & Yates, P.A. defends the rights of clients facing a variety of state and federal criminal charges leaving no stone unturned in a pursuit of clients' defense.

ESI Consulting (\$500 Sponsorship of Saturday a.m. break + Exhibitor)

Contact to be listed: Richard Connor 407-740-7163 Richard@esiconsultingfl.com

Contact Info: 955 South Orlando Avenue Winter Park, FL 32789 www.esiconsultingfl.com

Phone: 407-740-7163 Fax: 407-740-5805

<u>About:</u> ESI Consulting provides computer forensic services, including consulting, examinations, analysis, and expert witness testimony.

Thompson, Sizemore, Gonzalez & Hearing, P.A. (\$750 Sponsorship of half of Saturday lunch)

<u>Contact to be listed: Kevin Johnson</u> 813-273-0050 <u>kjohnson@tsghlaw.com</u>

Contact Info: One Tampa City Center 201 N. Franklin Street, Suite 1600 Tampa, FL 33602 www.tsghlaw.com

Phone: 813-273-0050 Fax: 813-273-0075

<u>About:</u> Thompson, Sizemore, Gonzalez, & Hearing, P.A. defends employers against administrative charges or lawsuits filed by employees. We also work with employers to advise them about laws that effect their relationships with employees and to solve problems that arise in those relationships.

Iurillo & Associates, P.A. (\$750 Sponsorship of half of Saturday lunch) Contact: Camille J. Iurillo

<u>Contact Info:</u> 600 First Avenue North, Suite 308 St. Petersburg, FL 33701 www.iurillolaw.com

Phone: 727-895-8050 Fax: 727-895-8057

<u>About:</u> We are dedicated to providing personalized legal service in a prompt and cost effective manner in the practice areas which include maximizing creditors' claims in bankruptcy cases, bankruptcy filings, bankruptcy litigation, creditors' rights, business litigation matters involving disputes over money or property, business transactional matters, and foreclosure litigation.

Ron Fleming Video Productions

(\$750 Exhibitor)

Contact to be listed: Ann Fleming 407-895-0961 ann@ronflemingvideo.com

Contact Info: 1512 East Concord Street P.O. Box 536386 Orlando, FL 32583-6386 www.ronflemingvideo.com

Phone: 407-895-0961 Fax: 407-895-0995

<u>About:</u> Now in our 29th year, Ron Fleming Video Productions, Inc. specializes in professional video and still photography services to attorneys and others in the legal field throughout the State of Florida and beyond: Video Depositions, Demonstrative Evidence, Inspections, Accident Reenactments, IME's and CME's, A Day in the Life productions, Settlement Documentaries, Courtroom Support and all other areas of litigation support.

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Gilsbar (\$750 Exhibitor)

<u>Contact to be listed:</u> Vanessa Phillips Phone: 985-809-3345

Contact Info: 2100 Covington Centre Covington, LA 70433 www.gilsbarpro.com

Phone: 985-871-1851 Fax: 985-898-1611

About: ??? (I can't get through to Vanessa to get info. Ricky, can you please fill in what they do? Thank you very much.)

(\$750 Exhibitor)

Orange Reporting / Orange Trial Technology

Contact to be listed: John Toner, Director of Litigation Support 813-598-8702 John@orangeReporting.com

<u>Contact Info:</u> 1416 East Robinson Street Orlando, FL 32801 www.OrangeTrialTech.com

Phone: 407-898-4200 800-275-7991 Fax: 407-898-4955

<u>About:</u> Since 1987, Orange Reporting has been your one-stop shop for unbeatable quality in one-call court reporting, interpreting, videoconferencing, and transcription service –and we are now pleased to offer exhibit graphic design, 3D animation, trial presentation, and video services through our newest division, Orange Trial Technology.

Riesdorph Reporting Group, Inc.

(\$750 Exhibitor)

<u>Contact Info:</u> 201 E. Kennedy Blvd., Suite 712 Tampa, FL 33602 Phone: 813-222-8963 Fax: 813-222-8964

 \mathbf{Or}

150 N. Orange Ave., Suite 418 Orlando, FL 32801 Phone: 407-282-4067 Fax: 407-282-4068

www.rrgtampa.com

About: Riesdorph Reporting Group, Inc. is a full service court reporting and litigation support firm.

Targeting Performance, LLC (\$750 Exhibitor)

<u>Contact to be listed:</u> Mary Trombitas mary@targetingperformance.com

3197 Spoonbill Court Clearwater, FL 33762 www.targetingperformance.com

Phone: 727-556-2656 Fax: 727-556-2546

<u>About:</u> The Primary goal of Targeting Performance is to assist companies in effectively managing their number one asset, human capital.

(\$750 Exhibitor)

Florida Coastal School of Law

Contact to be listed: Renee Alten 904-256-1114 ralten@fcsl.edu

<u>Contact Info:</u> 8787 Baypine Road Jacksonville, FL 32256 <u>www.fcsl.edu</u>

Phone: 904-256-1114 Fax: 904-680-7729

<u>About:</u> Florida Coastal is one of the largest ABA accredited law schools in the country. We are proud of our accomplishments that include a moot court them that is currently ranked 4th in the nation and a bar pass rate that consistently exceeds the state average.

Thompson Reuters / FindLaw

(\$750 Exhibitor)

<u>Contact to be listed: Joe Rodriguez, MBA</u> Senior Regional Sales Manager 954-610-5470 Joe.Rodriguez@thomsonretuers.com

<u>Contact Info:</u> 881 Crestview Circle Weston, FL 33327 <u>www.Thompsonreuters.com</u> www.Findlaw.com

Phone: 1-954-349-1195

<u>About:</u> FindLaw specializes in helping law firms create successful online marketing program by building an effective website and leveraging FindLaw directory services.



have benefitted by giving back to the community.

5) FAVORS AND DISCOUNTS DO NOT ASSURE BUSINESS, SO ASK FOR WHAT YOU DESERVE. As a start-up, I felt so grateful for any business at all and struggled with how much to charge for a case. The business coach helped me to stay on track with this. When I knew the person or the referral source well, I struggled with how much to charge. I still do. However, to help myself when quoting fees, I have created a fee chart listing my fees along with a fee policy which states when money is to be paid and what types of discounts I offer. To help prevent last minute fee drops, I post my fees on the bulletin board along with a listing of who may qualify for a discount and what the amount is. For example, neighbors get a 10% discount.

6) LIKE ROME, MY PRACTICE WILL TAKE TIME TO BUILD. Since I was not working prior to starting my own practice, I did not have savings available to begin my practice. To reduce expenses, I have used a virtual office to rent space for client meetings. The facility lists my name in the lobby directory and provides a reception area complete with a pleasant receptionist when clients arrive. I have also learned that I could save money by eliminating a separate fax line. When expecting a fax, I request that clients call me prior to faxing so that I can connect the fax to the phone line. For legal research, I use the free program available through The Florida Bar, Fastcase. Although I look forward to having my own office with an assistant and all the amenities, this is working well as I build the practice.

7) WHENEVER THINGS SEEM **OVERWHELMING, IT IS BEST** TO STOP EVERYTHING AND OR-**GANIZE.** As a new solo, the responsibility of being office manager, bookkeeper, receptionist, marketer, janitor and attorney can feel overwhelming on a regular basis. I have found that when that happens it is best to clean the office and organize the workload in order of priority. To keep up with the office financials, last year, I reconciled the books each month. I am pleased to say, that upon entry into year two, I have sought the assistance of a bookkeeper to help with this task.

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8) YOU REALLY DON'T LEARN SOMETHING, UNTIL YOU DO IT YOURSELF. Taking on a new practice area can be a test of humility. Regardless of how much reading, studying and confirming with others who have gone before you, you really don't know how to do something until you tackle it yourself. More importantly, you don't seem to really learn it until you do something and make a mistake! Although I check everything more than Santa or his elves, I have made some mistakes that I would prefer not to publicize. Suffice to say that my mistakes have taught me things that I will NEVER forget.

9) YOU ARE NOT YOUR LAW **PRACTICE.** When clients call and business is going well it is easy to feel good about yourself, but when the phone isn't ringing or clients aren't knocking on the door, it can bring you down if you take it personally. I have discovered the best way to deal with this is to detach from the outcome of my efforts to build this practice. Observing professional athlete interviews after a game have helped me to adopt this perspective. The athletes are often able to separate who they are from their performance in a particular event. I have found this method to work for me as well. Furthermore, it helps to totally break away from the work for a little while. A few hours at the playground with the kids, going for a run or cooking a good meal goes a really long way in creating balance in my life.

10) YOU ARE VERY MUCH YOUR LAW PRACTICE. In contrast to the above, when it comes to marketing, practicing the profession of law, and operating the business, you are your law firm. In my brief tenure as a solo practitioner, I am learning that marketing is more about building relationships than it is about advertising. Practicing law is just that, "practicing", and operating the business is ultimately the firm owner's responsibility regardless of who is hired to help. To paraphrase Thomas Watson, Sr., former President of IBM, "To be successful, you have to have your heart in [your law firm] and your [law firm] in your heart". Good luck!

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