Silverman Law Office, PLLC

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Silverman Law Office – Growth and Development Procedures

This Procedure Book is for Silverman Law Office Team use only

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Purpose

The purpose of the Growth and Development Procedure Handbook is to establish a comprehensive framework aimed at fostering an inclusive and dynamic workplace culture conducive to the continuous personal and professional advancement of all team members. These procedures are designed to specifically address the needs of various team members within our organization, including new team members transitioning into our workplace environment and expectations, support staff seeking opportunities for career growth, associate attorneys striving to enhance their legal skills and expertise, and senior attorneys seeking avenues for ongoing professional development. These policies will also include performance standards for both client-related work and network marketing expectations. It is the firm's belief that fostering opportunities for individual and team growth paired with metrics and accountability is the key to everyone's success.

Development Program

This program is designed to foster growth, accountability, collaboration, and support throughout our team. A coach is an experienced teammate, either in career or in the firm, to help you grow and find success at Silverman Law Office.

Ongoing Development Program:

- Following the probationary period, junior team members will continue to benefit from ongoing development provided by coaches, relevant to their position and experience in practice areas. This supportive coaching approach will ensure junior team members have opportunities to develop the necessary mindset, knowledge, and training to excel in our firm.

- Development meetings will serve as regular opportunities for team members to seek guidance on case management, company procedures, best practices, career advancement, training or educational opportunities, and more.

- Coaches and team members will *meet monthly* to discuss questions, suggestions, case or client guidance, and any other professional development needs. **It is the responsibility of the coached team member to schedule the meeting.**

- If you're a legal team member, the coach will attend *at least one Kickoff Meeting a month and oversee at least* one case you're working on at all times. This is to provide scheduled opportunities for constructive feedback targeted towards the development of your legal skills and goals.

Ongoing Leader Development:

- The Chief Operating Officer (COO) and Chief Executive Officer (CEO) will provide ongoing leadership training to leaders/coaches within the firm (Dept Heads, Senior Paralegals and Senior Attorneys). Training sessions will focus on enhancing leadership skills, fostering effective communication, leadership coaching for results, and promoting strategic thinking among senior leadership.

- Opportunities for business development training to senior leaders to support the firm's growth and expansion efforts. This can be internal or external meetings, conferences, and/or webinars. Training sessions will cover topics such as client relationship management, networking strategies, and effective business development tactics.

- Non-Legal Departments Leaders will also get personal and professional opportunities for further developing their skills as leaders and in their respective departments. This could include internal meetings, books, seminars & webinars, as well as workshops. As always, feel free to propose opportunities on your behalf, should there be a learning opportunity that has not been presented to you.

Requesting Professional Development Opportunities Outside of NBI

We recognize there are many opportunities for professional development outside of courses offered by our memberships with NBI. These can be online or in person, and can add significant value to you, the team, and the firm. This can include conferences, legal updates, lectures, advanced education course, and more. We encourage these professional development opportunities, but to approve these, you need to submit the following:

- WHAT:
    - What value does this event/training offer that is unique and can add value to you and the team?
    - What is the cost of the event?
    - What credentials does this offer you, if any?

- WHO:
    - Who all is/should attend?

- WHEN:
    - Dates (and times if it isn't a full day) you will be out of office

- WHERE:
    - Where is the event?
        - If it is online, you're expected to be at the office
    - Where will you stay?
        - What is the cost of the hotel?
        - What is the anticipated cost of mileage (Speak with Dava to figure this out)?

- HOW:
    - How do you plan to travel?
        - After hours on your time?
        - During hours?
        - Plane or car?
        - Etc.

    - How will you communicate with the team and your clients in your absence, if needed?

Billable/Non-Billable Expectations

The purpose of setting key performance indicators regarding time tracking is to create positive habits for Attorneys and Paralegals to achieve the team's success, as well as their own. Silverman Law Office is setting the following Benchmarks:

1) The first two-four weeks, you will receive training on our systems, marketing/networking, and company procedures. You should supplement any spare time with an effort to begin accumulating client work.

2) By 90 days, you're expected to achieve 29.8+ hours of billable client work per week, with regularity. After 90-days, or your next quarterly, leadership will assess your progress with you and determine if a Performance Improvement Plan is necessary to facilitate helping you find success. Various factors may be considered by leadership.

3) DO NOT WAIT (show the team you're hungry and able) – you must be trying to get as much client work as possible, as soon as possible. After your initial onboarding, then find time for admin/marketing requirements.

4) If you aren't hitting the billable client work requirement, then you are expected to send out an email, daily, asking for work, so that the rest of the team can help you obtain enough work to hit your billable requirements.

Approved time off will be factored in if hours are short or not met. If the reason for not meeting hourly goals is largely due to *flat fee* non-billable work, then this time, paired with billable work, should be equal to the Paralegal's/Attorney's billable requirement benchmarks.

Accounting For Billable Work (Write-Offs or Rate Reduction)

Silverman Law Office, PLLC has predetermined billable rates for each position and team member, as well as flat fee rates for specialized matters. Those rates have been shared and are available for everyone to view. The company rates are determined and billed due to our services provided, expertise, education, and experience.

It is the *responsibility and expectation* of everyone to know those rates or where to find them, and to ensure you are billing the clients at the approved rates.

It is *generally* not acceptable for an Attorney or Paralegal to alter the rates or choose not to bill a client for time/services rendered. We understand there are extenuating circumstances where this may be acceptable; an example of this is if a team member made a mistake drafting a form, we could choose not to bill for the time it took to rectify the mistake.

However, these circumstances are exceptions to the rule, not the standard. If choosing not to bill clients at the approved rates becomes a pattern, then the team can be greatly impacted, and everyone can fall short of their goals. If this is identified to be problematic, then a Performance Improvement Plan may be put in place to help the team member(s) achieve success.

Tiered Performance Improvement Plans

Objective:
This Performance Improvement Plan (PIP) is designed to guide team members toward achieving sustained success by developing positive habits in tracking, logging hours, and meeting benchmarks. The PIP will be implemented in phases, with escalating actions if improvement is not demonstrated within the specified time frames.

Phase 1: Initial Action (First 2 Weeks)

1. Daily Time Reporting:
Team members not meeting established benchmarks will begin reporting their hours at the end of each business day. Hours must be broken down into billable and non-billable categories and submitted to both the COO and CEO.

2. Initial Improvement Criteria:
Within the first two weeks, the team member must demonstrate the following:

- Immediate progress in meeting daily billable hour targets.
- Improved accuracy in time tracking and logging.
- Consistent submission of daily reports.

If these criteria are not met after two weeks, the PIP will escalate to Phase 2.

Phase 2: Escalated Action (Weeks 3-4)

1. Enhanced Reporting & Accountability:
If benchmarks are still not being met, daily reporting will now include a more detailed breakdown of tasks, time spent on each task, and specific actions taken to improve time management. These reports will be reviewed daily by the COO and CEO, and feedback will be provided within 24 hours.

2. Additional Resources:
The team member will be required to:

- Meet with a designated mentor or accountability partner once a week to discuss progress and challenges.
- You will complete a 5-day Time Study to assess with your mentor, for opportunities to improve.

3. Phase 2 Improvement Criteria:
By the end of Week 4, the team member must demonstrate:

- Consistent progress toward meeting weekly billable hour expectations.
- Noticeable improvement in time management and efficiency, as reflected in the detailed reports.
- Proactive engagement with the mentor and use of provided resources.

Failure to meet the Phase 2 criteria will result in moving to Phase 3.

Phase 3: Leadership Review (End of Week 4)

1. **Meeting with Leadership:**
   If improvement is still not shown by the end of Week 4, a formal meeting will be scheduled between the team member, COO, CEO, and other relevant leadership. The purpose of this meeting is to:

- Review the lack of progress in Phases 1 and 2.
- Discuss the challenges preventing improvement.
- Determine whether to extend the PIP with additional conditions or move toward termination of employment.

Final Phase Criteria:
Should the PIP be extended; the team member must demonstrate immediate and measurable improvement. Failure to do so within the new timeframe will result in termination.

Conclusion:
The PIP is structured to provide clear guidance, increasing levels of support, and accountability while outlining escalating consequences if improvement is not demonstrated. The firm's goal is to help the individual succeed, but consistent failure to meet benchmarks will lead to termination to maintain overall team performance and goals.

Summary of Phases:

- **Phase 1:** Initial two (2) -week period focused on daily reporting and attendance at the Monday Success Program.

- **Phase 2:** Escalation if no improvement after two weeks, with enhanced reporting, additional support, and resources.

- **Phase 3:** Leadership review and decision on extending the PIP or termination.

New Team Member Marketing Plans

We want to align with our new team members' marketing plans. We ask that our team members market the organization and themselves, so this procedure is going to outline the ASK and the OFFER to ensure we are aligned in these goals.

1. During orientation, each new team member should receive the following:

    a. A Mentor in a similar role or supervisory role
    b. Networking & Marketing spreadsheet.
    c. Onboarding homework for networking & marketing
    d. PCLC Training – including processes and procedures
    e. SLO Brand Handout

2. Networking Plan Outline

    a. In order to grow your reputation and bring clients in, you need to have a quality plan before getting out there and just handing out business cards. To do this, <u>draft a detailed Marketing Plan</u> that outlines how you plan to conduct targeted networking to bring clients in for work.
    b. Your Plan Must Include (For your primary and secondary practice areas):
        i. **Perfect Client:** Who is the ideal client for this practice area? Complete the following document the first week of employment.
            1. Silverman Law Office, PLLC/5. Marketing/_Networking Spreadsheets/Client-customer connection.docx
        ii. **Target Audience**:
            1. Who knows your ideal client? Why do they connect with your client? What is important to them? Do they attend networking events? How can you help the people your clients know?
                a. Should help create your list for your homework*
        iii. **Competitive Analysis:** What steps are other law firms doing to contact these individuals? What can you (SLO) offer them, that the other firms may not be as good at? Why should the clients pick you?
        iv. **Implementation**:
            1. List events you can attend AND your goal for attending each, such as collecting 3 business cards or arranging one meeting.
            2. Draft a letter or email you can send to your target audience introducing yourself and that you'd like to connect.
            3. Draft an outline/talking point on how you can connect during your meetings (use senior attorneys for a resource if needed)
    c. The Marketing Plan is due **within 30 calendar days following your start date** – put this on the Outlook Calendar.

3. Marketing Efforts

    a. Complete the following with the deadlines – PUT ON CALENDAR
        i. Provide a quick bio for the Silverman Standard Article and a photograph of you for this **(10-days)**

ii. Provide a bio for the website – this focuses on YOUR WHY (**10-days**)
iii. Write a blog article regarding your primary practice area and why you enjoy doing it (**30-days**)
iv. Attorneys – Write an introductory letter/email to go to all potential customers in the area (**20 days**)
v. Attorneys - Write an article for the Bar Magazine (**30 days**)
vi. Attorneys - Write an article for a local newspaper (**60 days**)

b. Simultaneously, the firm will
   i. Schedule a photograph from Floating Leaf Studios (first week)
   ii. Have Matador create an Employee Page for you, with a bio and photo (first month)
   iii. Distribute your writings/articles in papers, and magazines, and get you connected to the Chamber of Commerce and other organizations
   iv. Schedule a "Faces" video six months following your hire – Calendar
   v. Other staff members in the new hire's office will be required to do an in-person introduction of at least one connection of theirs that they feel may be a quality contact for the new team member. <u>This is to be initiated by the current team members (30 days).</u>
      1. Vise versa, if applicable
   vi. Leadership will ensure you CALENDAR the tasks to ensure timely completion and align with the team members' schedules.

4. Attorney Onboardings

   a. New attorneys to the firm will be expected to learn and incorporate the Silverman Law Office's method of Onboarding (Onboarding Script).
      i. First two weeks, review the Onboarding Script located in the Intake-Onboarding Procedures, at ***"Silverman Law Office, PLLC\2. Human Resources\Office Procedures\Procedure Binder_Intake - Onboarding Procedures.docx".***
      ii. After initial orientation, you will sit-in and participate in Client Onboardings.
      iii. Attorney Experience
         1. If you have more than 3 years of experience in a specific practice
            a. **Three (3) months** after starting the Marketing Manager and the COO will conduct a Mock Onboarding with the new Attorney, at which time, will be rated on a scorecard to determine whether you can solo or not.
         2. If you have less than 3 years of experience in a specific practice
            a. **Six (6) months** after starting the Marketing Manager and COO will conduct a Mock Onboarding with the new Attorney, at which time, you will be rated on a scorecard to determine whether you can solo or not.

Perfect Client and Target Audience

The purpose of this exercise of creating a **Client Avatar** is to help you identify your CUSTOMERS, by having a deeper understanding of who your IDEAL CLIENT is. The end result should be a 1-2 page description of your ideal client and their customer affiliations. Use the below bullet points and the brand strategy toolkit client avatar examples as guides for your own Client Avatar. This process should be done for at least your two main practice areas.

Expectations: Each Client Avatar should be a minimum of 1 page long with 1.15 line spacing. Each should include a minimum of 3 paragraphs about your Ideal Client as well as at least 1 paragraph that includes a minimum of 3 Customer Affiliations.

CLIENT AVATAR

Level 1 – General demographics

- Gender
- Age range
- Where do they live?
  - Suburbs or inner city?
  - Do they own or rent?
  - Land or condo?
- Single/Married/Children? - If children… young, teens, or grown? Grandchildren?
- Career - Career stage & goals
- Financial state - Has savings? Assets? Investing?
- Hobbies - List three

Level 2 – Motivators & Values

- What motivators influence their decisions… Elaborate
  - Family?
  - Financial Success?
  - Community support and involvement?
  - Prestige?
  - Retirement planning?

Level 3- WHY

- After identifying the motivators above, WHY are those influencing their decisions?
- Examples
  - Family – to prepare for their child's future after they pass
  - To further their career and get a stake in the business
  - Long-term business protection and success

CUSTOMER AFFILIATIONS

Now that we know our client. Know them as a human. Know their goals, aspirations, and why they have these ambitions…

- WHO do they seek to achieve success?
- WHO would you recommend they contact to achieve their goals?
- What businesses do they partner with?

Networking Assignments for New hires

Week 2 Assignment

- Create a list of organizations in the area that you feel you should establish professional relationships with, in order to develop your professional network of referral sources
- Also, for each organization, identify representatives of the organization that you can contact
- Attend 2 networking meetings with other attorneys

Week 3 Assignment

- Introduce yourself to representatives from your list and try to set up face-to-face meetings
- Meet with at least 1 representative from an organization you contacted
- Contact any remaining representatives from your list

Week 4 Assignment

- Have attended at least one community networking event
- Attend 2 meetings with professionals who are potential referral sources
- Continue to expand on your networking contact list (rolodex)

Week 5 and beyond, the standard networking expectation for an attorney is:

- *(Touch Bases) 5 professional contacts a **week*** (email, phone call, face-to-face, text, etc.) with organizations/representatives that are part of your potential referral wheelhouse, plus
- *1 networking event/meeting each **week***, which can be a coffee, lunch, dinner, drink, etc.

Legal Team Marketing Expectations

It is important to understand that when referred to our firm by another professional or client, potential clients have already a level of trust that we cannot gain from having a web presence alone. That being said, one of our firm's key measures of success is networking and marketing. We are establishing benchmarks for the team to ensure this critical task is at the forefront of the organization's efforts.

Two parts of networking/marketing yourselves that we want you to put an emphasis on. First, is expanding your network. We don't want to become stagnant or settle for just what we have, so it is vital that you are routinely trying to contact new professionals that you've not met, or asking professionals if there is anyone else you could speak to that they know. Second, fostering the relationships you have by staying top-of-mind. This requires continued contact with those you've met through your networking efforts. Top-of-mind is critical because you want them to think of you when someone could use your services.

Attorneys

- **5 professional contacts/follow-ups** a **week** (email, phone call, face-to-face, text, etc.) with representatives that are part of your potential referral wheelhouse, plus
- **1 networking event/meeting each week**, which can be a coffee, lunch, dinner, event, etc.

Paralegals

- **3 professional contacts a week** (email, phone call, face-to-face, text, etc.) with organizations/representatives that are part of your potential referral wheelhouse, plus

- **2 networking events/meetings each month**, which can be coffee, lunch, dinner, drink, etc.

To manage this program, each team member will have a spreadsheet located in the company files, at ***Silverman Law Office, PLLC/5. Marketing/_Networking Spreadsheets. Each team member will complete their weekly contact details by Friday evening of each week.***

Performance Coaching Meeting

Performance Coaching Meetings are designed to keep you informed on your performance in the company, in regard to your Job Functions and culturally with our Team Behaviors. Everyone on the team will be evaluated on their specific expectations and key performance indicators each quarter. This ensures that the team members know what they're being evaluated on and the associated performance metrics. There is a rubric located in the Performance Evaluation Folder for evaluating/scoring the Team Behaviors. Performance Evaluations are Located at, **"Silverman Law Office, PLLC\2. Human Resources\Performance Evaluations."**

Team members are to have the 1-on-1 Performance Coaching Meeting each quarter. The Team Member being evaluated is expected to review their evaluation sheet prior to the meeting and bring substantive notes and their own scores at the meeting. This encourages dialogue during the meeting for a more comprehensive meeting to ensure there is clarity and understanding between the team members and leader. Feedback should be gained from the team members assigned Coach.

As noted above, you are evaluated on Job Functions and Team Behaviors. These are each scored separately and weighed 50/50. Regarding Job Functions, your specific position in the company will have its own Individual Categories, with subsequent expectations outlined in the Duties section. Each category within this section is weighted differently, depending on your Position, and creates a cumulative score for the section. The Job Function and Team Behaviors section scores are combined, to create your overall Performance Evaluation Score for that time period. Below is an example of a Performance Coaching Form.

SILVERMAN LAW OFFICE

1-on-1 Performance Coaching Meeting

Name:
Position:
Date: 8/28/2023
DiSC Style:

Job Function	Duties/Output: "What"		Behaviors: "How"		Notes
Client Management Weight 60%	1 Client Complaints 2 Billed/Collected ($xxx,000/quarter) 3 Proactively communicates with clients, appropriately 4 Limited re-work (things done right the first time) 5 Making the client feel heard and important 6 Effective Kickoff Meeting and Delegation of Tasks 7	3.00	Trust	3.00	
Administrative Weight 10%	1 Active Participant in Meetings 2 Follows Procedures 3 Utilizing Available Tools/Resources Appropriately 4 Managing Time/Time Off to Effectively Accomplish Goals 5 Knows and uses Smokeball effectively 6 Keeps client files updated with all communication 7	3.00	Conflict	3.00	
Networking / Marketing Weight 30%	1 Completing weekly touch bases (5/wk) 2 Attending functions to ID new customers (1/month) 3 Networking with another professional referral source (1/week) 4 Brought in clients through self or customers (none | 1-2 | 3+) 5 Presented/spoke at event (1x year) 6 Wrote/published article or blog (1x qtr) 7	3.00	Commitment	3.00	
Weight 0%	6 7		Accountability	3.00	
Weight 0%	1 2 3 4 5 6 7		Results	3.00	
Calculations	50%	1.5	50%	1.50	3.00