MCLE FORM 1: Recordkeeping Form (Do Not Return This Form to the Bar)

Instructions:
Pursuant to MCLE Rule 7.2, every active member shall maintain records of participation in accredited CLE activities. You may wish to use this form to record your CLE activities, attaching it to a copy of the program brochure or other information regarding the CLE activity.

Do not return this form to the Oregon State Bar. This is to be retained in your own MCLE file.

Name: 
Bar Number: 

Sponsor of CLE Activity:
OSB Professional Liability Fund/OSB SSFS

Title of CLE Activity:
Future Proofing Your Law Practice

Date: 
Location: 

Activity has been accredited by the Oregon State Bar for the following credit:

☐ Full Credit. I attended the entire program and the total of authorized credits are:

1 ___ General or Pract. Skills
2 ___ Prof Resp-Ethics
3 ___ Access to Justice
4 ___ Abuse Reporting
5 ___ Practical Skills

☐ Partial Credit. I attended ______ hours of the program and am entitled to the following credits:

1 ___ General
2 ___ Prof Resp-Ethics
3 ___ Access to Justice
4 ___ Abuse Reporting
5 ___ Practical Skills

*Credit Calculation:
One (1) MCLE credit may be claimed for each sixty (60) minutes of actual participation. Do not include registration, introductions, business meetings and programs less than 30 minutes. MCLE credits may not be claimed for any activity that has not been accredited by the MCLE Administrator. If the program has not been accredited by the MCLE Administrator, you must submit a Group CLE Activity Accreditation application (See MCLE Form 2.)

Caveat:
If the actual program length is less than the credit hours approved, Bar members are responsible for making the appropriate adjustments in their compliance reports. Adjustments must also be made for late arrival, early departure or other periods of absence or non-participation.

*Personal Management Assistance/Business Development. See MCLE Rule 5.13 and Regulation 5.300 for additional information regarding Category III activities. Maximum credit that may be claimed for Category III activities is 6.0 in a three-year reporting period and 3.0 in a short reporting period.
Future Proofing Your Practice

Presented By
Kim Mayberry, Certified Lean Six Sigma Black Belt
REAL Automation Solutions
www.realautomators.com

‘Cynics do not contribute, skeptics do not create, doubters do not achieve.’

Bryant Hinckley
Are you finding it harder to get new clients?
Do you have pressure from your clients to charge less?
Do you feel like you are “Fire Fighting” all the time?
Do you feel stuck in your practice?
Do you have time to strategize about your firm’s direction?
Do you have enough personal and family time?

The Market Has Shifted

► ‘Lawyers are perceived as expensive’
► ‘Public worries that lawyer will be confrontational and drag things out’
► ‘Many try to do it on their own’
► Middleclass is leaving traditional legal services behind

(1) Future of Legal Services in Utah - Utah Bar Report 2015
Legal Services Trends

Demand for Legal Services

Demand for Law Firm Legal Services

Deloitte June 2016 - Future Trends for Legal Services Global research study

Chart 1 - Growth in Demand for Law Firm Services

Y/Y Change

Source: Thomson Reuters Peer Monitor

2017 Report on the State of the Legal Market - Produced by The Center for the Study of the Legal Profession at the Georgetown University Law Center and Thomson Reuters Legal Executive Institute
Chart 6 – Collection Realization against Standard Rates

Chart 11 – Profit Margin Stagnation

Source: Thomson Reuters Peer Monitor

*Rolling 12 months through Q2 2016 (i.e., Q4 2015–Q2 2016)
Supply vs. Demand

NUMBER OF ACTIVE ATTORNEYS

Source: [http://www.americanbar.org/content/dam/aba/administrative/market_research/total-national-lawyer-population-1876-2016.authcheckdam.pdf](http://www.americanbar.org/content/dam/aba/administrative/market_research/total-national-lawyer-population-1876-2016.authcheckdam.pdf)

Supply vs. Demand (continued)

NUMBER OF PEOPLE PER LAWYER

Source: [http://www.americanbar.org/content/dam/aba/administrative/market_research/total-national-lawyer-population-1876-2016.authcheckdam.pdf](http://www.americanbar.org/content/dam/aba/administrative/market_research/total-national-lawyer-population-1876-2016.authcheckdam.pdf)
Steps to Future Proofing Your Practice

- Crystalize your goal
- Develop your team
- Eliminate $10 an hour work
- Delight your clients
Increase Revenue

Improve Efficiency

More Family/Personal Time
Specific
Measurable
Achievable
Relevant
Timebound

Step 1 - Increase Revenue

Step 2 - Increase Profitability by 15% by December 31, 2017

Step 3 - Determine on a monthly basis what actions need to occur to get to the 15% increase
GRAT Model

Team
Alignment
Respect
Gratitude

Step 1 - Determine the Bottleneck

Step 2 - Develop process(e) to alleviate the bottleneck

Step 3 - Repeat with new bottleneck - Continuous Improvement
Chapter 8—Future Proofing Your Practice—Presentation Slides

Standard Operating Procedure

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>Sub-Task</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Draw a letter M at the top left intersection.</td>
<td>1.1</td>
<td>Bottom center of M touches intersection</td>
</tr>
<tr>
<td>2</td>
<td>Draw letter W at bottom left intersection</td>
<td>2.1</td>
<td>Top center of W touches intersection</td>
</tr>
<tr>
<td>3</td>
<td>Draw letter W at bottom right intersection</td>
<td>3.1</td>
<td>Top center of W touches intersection</td>
</tr>
<tr>
<td>4</td>
<td>Draw arc from letter M to top right intersection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Draw another arc from top right intersection to bottom right W</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Draw an arc between the two bottom Ws</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Draw the letter O in center left box</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Draw arc from letter M to tangent of the circle</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Draw arc from left W to tangent of the circle</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Draw an arc for the mouth</td>
<td>10.1</td>
<td>Half way between the W and circle</td>
</tr>
<tr>
<td>11</td>
<td>Draw an arc for the eyes</td>
<td>10.2</td>
<td>Must be a happy pig</td>
</tr>
<tr>
<td>12</td>
<td>Draw cursive letter e near top of arc on right</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Draw two dots in middle of circle for pigs' nose.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Second Annual Solo and Small Firm Conference—Agile and Cyber-Savvy: Advancing Your Practice

Over time delightful innovation becomes another basic need.
Step 1 - Determine Basic Needs

Step 2 - Determine Performance Needs

Step 3 - Determine Delighters

Your Homework

- Think about what you really want in your life and practice
- Set two SMART goals to achieve what you want in your life/practice
- Come to the “Part II: A Client Services Case Study”
www.realautomators.com/oregon

Free Items

• Access to Our HotDocs BootCamp for 6 Months
• Jumpstart Training