

ANALYSIS OVERVIEW

Congratulations, you've taken a courageous step by identifying your score as compared to your peers. This report will offer you a 30,000 foot view of where you currently stand for these major system focuses:

1. Practice Area
2. Time Management
3. Financial
4. Marketing performance

Our goal is to offer you guidance to build a solid foundation for your practice. We suggest you do that by focusing on what we call the Perfect Client Life Cycle.

YOUR PERFECT CLIENT LIFECYCLE



The PCLC is the process that every client works their way through at your practice, even if you're not co-noscente their doing so. Your clients first start as a lead, then they set an appointment, show up to that appointment, retain the firm, pay their bill and then refer other potential clients to you. While you may have a slightly abbreviated or elongated process, this system is the one that will maximize the number of leads that turn into clients and the amount a client is willing to pay your firm for service, also known as price elasticity.

Your score allows us to make general assumptions about your current practice and offer advice and basic steps to reach the next level. If you'd like more specific advice regarding your firm, please continue reading.

Next Action Steps For You

We recommend you locate your score level for each major system area and review the advice in that section. Further, be sure to review any levels that may be above or below your current score. This will help you know the other systems you should already have in place or what you'll need to focus on to achieve the next level.

While this advice is general it is also relevant, ignore it at our own peril.

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Now, if you're ready to take the next step, and you want to figure out how to work with us, all you have to do is click the button below to schedule a strategy session. We're going to invest an hour of our time into your business actually giving you real world strategies and tactics that are working for our clients today. At the end of that hour, if you decide to work together, we'll figure out how to take the next step, but we like to put the wood into the fireplace before we ask for the heat. Go ahead. Schedule a strategy session with us today and find out if this is right for you.

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If you are not ready to schedule time to identify your specific practice needs, but you'd like to learn more about building systems to run your practice, you can visit the Education section of our website where we have free books, and videos available to aid you during your journey.

www.TheRichardJames.com/Education



"Without a system you cannot run any kind of business. I treat my law firm like a business. And if you don't have a system in place, you're going to have a hard time running it and making it successful. What we created with Rich is an unbelievable system with different departments has to supervise different people. And I, as the CEO, you really have to inspect every single issue and person for the office to run the way you want it to run and perform the best."

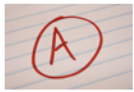
- Maria Jones, Phoenix, Arizona

PRACTICE AREA PERFORMANCE

Overview / Summary

In this section we'll analyze how you measure up compared to your peers as it pertains to Practice Area Performance. We'll take all facets of the analysis into consideration such as time management, financial consideration and marketing structure. Naturally, there are outlier situations that affect each of these categories. Based on the answers you provide, your analysis should be judged as an overall health meter of your firm in comparison to similar size firms.

Recommendations by Score:



Congratulations, you scored an "A" as compared to similar size firms for overall performance. In many ways you've arrived. Either you've been around long enough to learn what you need to know or you've been smart enough to hire people smarter than you—it could be a little of both. In either case, at this point you should have both the money and the time you want. Retirement is not in your future though. There are more frontiers for you to conquer, there are more nuggets of life for you to learn. We'd argue that there is a danger to being in this position. You're the firm with the biggest bull's eye on your back. Every smaller firm is gunning for you. If you do not take steps to stay ahead of the competition, those firms will start to chew away at your market share. When you are dealing with large numbers, even the smallest percentile of change can make a very real difference in net dollars. Our advice: Look deeper, inspect more, find new ways to separate you competition and realize that until you decide to quit the game, the game you've created is never over.



Congratulations, you scored a "B" as compared to similar size firms for overall performance. However, it's important to remember your business should not be judged solely on the gross sales or the revenue it generates. Eventually, just having money gets old and you will begin long for a lifestyle change. You'll want to see your kids more, you'll want to spend more time with your spouse or investing in your hobby and money will not accomplish any of these for you. The solution to this problem is having the right systems in place to better manage your marketing, financials, and most importantly your staff. The right system of checks and balances will set you free.



You scored a "C" as compared to similar size firms for overall performance. This is the middle ground for

law firms; it's the place most law firm owners find themselves in. You've been around long enough to perfect what you know but you are certain there are still many things you still must learn about running your practice. It's likely you've developed team members to help you run your firm at this point. If you have multiple attorneys on your staff managing them is kind of like herding cats. You're close to cracking the code but if you're honest, you're unsure where to start to identify the problem. Even if you have already developed systems for managing the departments of your firm, you know there is more to do. If you cannot easily identify where the holes in your practice are, you do not know your performing areas and worse, your underperforming areas. Proper systems will help you know exactly what is working well, and what isn't working at all.



You scored a "D" as compared to similar size firms for overall performance. The good news is you are no longer at the bottom but you still have a long way to go. It will be vital for you to investigate the specific sections below to identify which department could require the largest overhaul. Chances are pretty good that you have not installed solid systems in your practice to measure the performance of all departments. Before you can continue to grow, we advise you to put a plan in place to immediately remedy that problem.



You scored an "F" as compared to similar size firms of overall performance. You'll need to investigate every facet of your business to identify which systems are lacking. Chances are, your business is not as profitable as you'd like it to be. It's also likely you are unable to invest in attracting new leads or build better systems for marketing and management. You may be starting to wonder why you ever got into the business of law. You must ask yourself: Are you charging the right fee for your services? Do you have a solid plan for collecting the fees you do charge? We suggest you review the financial section of this review first. That is a house you must get in order before you can move forward.



"Working with Rich allowed me to be accountable to someone we all need. It allowed me to become successful and to put business systems in place that ultimately transformed my business, so that I'm no longer an attorney working for the law firm, I'm an attorney running the law firm."

- Scott David Stewart, Phoenix, Arizona

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TIME MANAGEMENT

Overview / Summary

In this area we focused on your time management skills. We find it funny that we call it "time management" because we don't believe we can actually manage time. It's not a person or a thing or a machine, it's, well, time. All we can do is manage ourselves. This section rates how well you manage yourself and your discipline to the art of time management.

Recommendations by Score:



Congratulations, you scored an "A". You're a master at managing yourself throughout the day. But let us ask you, what are you doing to disseminate that learned skill set to your team members? What system of training do you have in place to show others how to accomplish what you accomplish? If the answer is nothing, why not? We already agree that the fastest way to enjoy more from life is leverage on your terms so why not train your team members to be as efficient and happy with their life as you are with yours? Finally, who's your coach? Who do you look towards to keep you in line and on track? We all fall off track, whether it be holiday, vacation or illness, all of these things knock us off just a little bit each time. It's a coach who keeps us on track. Find yours today, you'll be happy you did.



Congratulations, you scored a "B" and you feel you've got things managed pretty well. While that may be true, did you do the things I told the other groups to do? If not, what's holding you back? You know you can always improve. Deep in your heart you know there are ways you can get more from each day and change your perspective to improve your quality of life, let's get it done. Finally, here's a tip from us. The young guns these days (sorry for the jab if you are one) all want to operate from their phones. While it's cool to have the latest gadget we've found keeping it simple is best. Do two things every day and it will change your life. 1. Each night before you go to bed, read your schedule and identify the top 3 things you must do the next day. 2. Write that list on an index card and keep it in your wallet. Each time you complete a task, cross the item off the list. There is little more satisfying than crossing something off a list with an actual pen!



Scoring a "C" is like being a glass of warm iced tea - it looks like it should taste good but the experience is a letdown. Then, allow us to recommend an excellent book called No B.S. Time Management for Entre

preneurs by Dan Kennedy. Be committed to the process of understanding the importance of managing yourself throughout the day. This subject is so large that we'd never cover all the advice in this section but Dan Kennedy does a great job of getting to the heart of the matter for the self-employed. When you're finished with the book, get busy committing yourself to being better at this.



Because you scored a "D" we know that while you're not at the bottom of the list, you still have not made managing your time a primary focus for your day. Here's where to start. First, identify where your time suck is. Do a time study on yourself and see where you're wasting time. Commit to the study for 30 days and at the end of the study, analyze the data and see if you're too focused on being reactive rather than proactive or if you're simply a lousy planner. Are there areas of your business that you could outsource to a vendor or another staff member?



Scoring an "F" tells us that managing time simply is not a priority for you. You don't believe that it's an important part of running your business. If you wish to grow your firm, attract the right clients and high quality personnel, you must first decide that managing yourself comes first. It is said we receive from the world through the same window we give through. Managing yourself is a form of giving back to your business, to your clients and to your staff. You will never be granted more than 24 hours in the day. All you can do is manage your behavior though those hours so you maximize your experience and the experience of those who interact with you.



"I have learned a lot. When I first started with Rich, the first month we tracked our lead conversion and how many closes we had and we found our conversion was 18 or 20%. It was really low. If you would have asked me before we were tracking that, I would have said about 80 percent of the people who walked through that door were going to sign up with me. He taught me that I really need to know what's happening in my firm. Using that information and using those numbers, I have been able to teach my staff how to better close, how to better get people through the door and ultimately that rate has increased to about 50%!"

- Theron Morrison, Ogden, UT

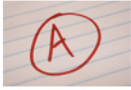
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💰 FINANCIAL PERFORMANCE

Overview / Summary

In this area we'll analyze how well you are managing the cash of your business as compared to your peers. We'll know if you're not charging the right fee for your services, if you're not collecting on the fees you do charge and if you're actually paying attention to the flow of money as it runs through your firm.

Recommendations by Score:



Congratulations, you're in tune with your financial surroundings, you're charging the right amount and you're collecting as much as possible on each case. If I were to ask you what your cost per lead was, you'd know. If I were to ask you what your cost per client was, you'd know. If I were to ask you what your average client value was, you'd know. What's left? This all depends. What's your goal? If your goal is to continually grow the company, I suggest you start looking for a controller to manage this for you. Then you can be free to invest your time looking for ways to reduce your cost per lead and cost per client and increase your average client value. You'd also be free to look for new, inventive ways to attract a client, even if the cost is more than you're used to. They exist, all you need is the time to find them.



Congratulations you scored an "B" as compared to similar size firms gives says you are on the right road. You have set your fees accordingly and you're starting to pay attention to your financials regularly. Let us give you a couple of tips that will take you to the next level. First, ramp up your financial review to weekly. Have your bookkeeper reconcile your accounts each and every week. Request QuickBooks Online Software be used so you can have access to real time data. You need to look for ways to license the bookkeeper to access all your information to avoid having to give them everything. This will free you up to do what you do best, run the practice and bring in new clients. The second piece of advice is to put your collections on steroids by communicating with your clients before their invoice goes past due. (If you are a contingency based firm, don't blow this off. You can still be proactive in your communication with your clients too). Rather than being reactive to clients who owe you money, call every client at the time of hire every month to stay in touch with them. This way, when they fall off their financial commitment, it will be easier to get them on the phone.



Scoring a "C" as compared to similar size firms means that you understand what to charge but maybe not

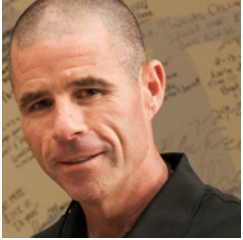
how to collect it or maybe you're a contingency-based firm and you don't worry about collections. You're still not paying close enough attention to your financial reports. You may still be using an accountant rather than a bookkeeper, you don't have the ability to run profit and loss statements on demand and if we were to ask you what your cost per client was, you couldn't tell me. On a monthly basis, make sure your bookkeeper sends you a profit and loss statement and make sure they break out the marketing category of that statement for you. Then, be sure to identify all the new clients who hired your firm that month. Divide the number of new clients into your total marketing expenses (minus one time costs) and you'll have your cost per client. The next number you need is your average client value. Take the total revenue for the month. Divide that number by the number of clients who paid you that month and you'll determine your average client value per month (to get a stronger number you should do this over a one-year period). Those two numbers will give you the clarity to make the right financial decisions for your firm.



Scoring a "D" as compared to similar size firms means you're doing something more than nothing but not much. I'm guessing you should focus first on raising your prices. There's nothing more difficult to watch than an attorney who busts butt for clients but still does not have enough money to provide for the family. You went to school and paid hundreds of thousands of dollars to get your education. You must charge the right fee. I promise you, your clients will not run away. And if they do, you've got the wrong ones to begin with. Start slowly, don't do it all at once. Raise your prices a little bit each month and see what happens. I'll bet you'll be surprised.



Scoring an "F" as compared to similar size firms means that your financial situation is a mess. You most likely never see your profit and loss statement, your marketing budget is not broken down into categories, you're not charging enough for your services and/or you're not collecting all the money that's owed to you. If you're going to own a business, this is the one section you MUST get right. This is your business and no one is going to look out for it if you don't. You may see this as your blind spot, but you must commit to fixing it. First things first. Hire a bookkeeper and do exactly as they say.



"Working with Rich and figuring out our leads and how to manage them has been critical to what we do. In the past, when I wanted to do more business, I would go out and spend more money on advertising, spend more money with my Yellow Pages, spend more money on TV. It took Rich to help me realize I don't need more leads. Instead, I need to do a better job of managing the leads I already have. And with what Rich has taught me, we are doing a better job with the leads we have. Before I met Rich, I had always tried to improve how we manage our leads, staying in touch with them and communicating with them, but we could never figure out the right process to make it happen. With the systems Rich has helped us implement in our firm this has been instrumental in the growth of our practice."

- Jamie Miller, Milwaukee, WI

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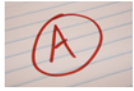
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MARKETING PERFORMANCE

Overview / Summary

In this section we are scoring you on your lead flow, lead conversion and referral machine when compared to similar size firms. We believe that marketing is 50% math, 30% systems and only 20% new ideas. While most attorneys who struggle tend to chase the bright and shiny object, those who succeed tend to ensure a foundation of measurement is in place from the very beginning. They then refer to those measurements before they make any new decision.

Recommendations by Score:



Congratulations you scored an "A" as compared to similar size firms. You're at the top of the food chain in marketing. However, I'll bet we can improve on all your lead generation needs and your conversions. Let me ask, are you using a deadline on all your advertising? If not, you're missing out on a multiple of leads that could be coming your way. Are you using the A.C.E. principle of Authorship, Celebrity and Expert whereby you write a book and use the book as a lead magnet to identify interested consumers? If not, you're missing out on a strategy that will turn your already hot burning business into a vat of molten lava. Not to mention, this strategy will create price elasticity and increased referrals.



Congratulations you scored an "B" as compared to similar size firms means you get it, you know how to drive leads, convert leads through what we call the Perfect Client Life Cycle, (leads, to appointments set, to shows, to hire, to paid in full, to referral). We have two questions for you: 1. Are you using all five senses of communication at every conversion point to maximize results? Are you using the telephone, direct mail, e-mail, text messages, and automated voice blasts? If not, what's stopping you? By communicating with all five senses, we've proven that you can easily see a 30% increase in conversion at some points in the life cycle. 2. Is all of your communication automated-- you set it and forget it? If not, you should acquire software that will allow you to automated the five senses of communication. This way you can be certain that when a prospect comes to your firm, if for whatever reason they say no, you'll be in front of them when they change their mind.



Scoring a "C" as compared to similar size firms means that at some level, you know the importance of generating leads and converting them to the next stage but you're unsure of how to maximize the perfor-

mance. Most likely hiring one single person will change your life and that person is the one who will run your phone department. They will handle all your inbound calls, make all your outbound calls to unconverted leads and make any/all collection calls that need to be made to clients who owe you money. But, the first step of this process is you believing that the phone and perfecting how it's managed by a sales person with experience will actually make a difference. It will, trust us.



Scoring a "D" as compared to similar size firms means that you have no system of follow up with leads that do not set an appointment, do not show to their appointment or do not hire you after the first visit because either you don't know how or didn't even know it was important to do. We must first start with you. You must be convinced that to build the business of your dreams you must be committed to the system of marketing. That means you must first start by committing to harvest every piece of information about every single lead, every single time and you need a system to do just that. The easiest way to accomplish that is to use a www.google.com/drive spread sheet. Enter all your data here and you'll have one place you and all your staff can access simultaneously.



Scoring an "F" as compared to similar size firms means that you are most likely, not driving as many leads, using as many lead sources and converting as many leads as your peers. Most likely you can't afford to invest money on marketing because your business doesn't make much money right now. What's important to understand is that you must invest a little bit of each case value into marketing. In the beginning, start with 10%. If you don't have 10%, you're likely not charging enough for your services, you're not collecting all the money you charge or you're taking too much too soon as a salary for the work you're doing. You must get your finances right to allow all other areas of the practice to work.

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RICH'S BIO



Richard James, Founder and President of Automated Business Results, has earned a reputation as a national "Legal Systems Expert." His legacy includes a career of building businesses in five different industries bringing his secret to each to achieve success. His success ingredient is simple: systems.

Author of two books, *The DNA of the Autonomous Attorney* and *Discover The Acres Of Diamonds In Your Law Firm*, Richard has devised a twelve step system for designing and implementing automated marketing systems that grow your business FAST.

Applying his creative energies on a helping key law firms manage their direct marketing initiatives and achieving extraordinary results. Richard put his systems and marketing tools to the test in building one of the most successful consumer bankruptcy firms in Phoenix from Zero to surpass \$3.5 million in sales in just over two years.

Richard believes that attorneys can truly create a practice that will support their dreams and aspirations rather than undermine their very core values.

More information about Richard James, his services (that can develop a law practice that supports its owner's lifestyle rather than completely undermining it) and more of his story may be found at www.TheRichardJames.com.

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