

—MY SHINGLE—  
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# The StartUp Law Firm AI-ccelerator Course Schedule



Presented by  
Carolyn Elefant

## Course Schedule Summary

Date	Description	Time
<b>May 3, 2023</b>	Pre-release of materials; Ethics of Starting a Law Firm & Ethics of AI	
<b>May 10, 2023</b>	Module 1	2PM -4PM ET
	Jeena Belil & Barry Seidel: Turning Challenges into Opportunity	2:15PM -3PM ET
	Tom Martin: All About AI & ChatGPT	3PM – 4PM
<b>May 11, 2023</b>	Module 2 & 3	12PM-2PM ET
	Regina Edwards : Flat Fees	12PM—1PM
	Gwen Griggs & Whitney Harper: Alternative Business Model	1PM—2PM
	Kimberly Bennett: Legal Subscriptions & Fidu	2PM-3PM
<b>May 12, 2023</b>	Victoria Collier: Starting with the End in Mind	12PM-1PM
	Open Work Session	1PM—3PM ET
<b>May 16, 2023</b>	Scheduled Office Hours (book appt. in advance)	7PM-10PM ET
<b>May 17, 2023</b>	Module 4 (Interactive Work Session)	2PM - 4PM ET
<b>May 18, 2023</b>	Module 5 (optional work session 2PM - 3PM ET)	12:30PM – 2PM ET
	Suzi Hixon: Revolutionizing Your Law Firm with Innovative Tech Stacks for Business Development and Client Relationship Management	1PM—2PM
	Sahmra Stevenson: Technology for a Modern Online, Remote, Hybrid or Mobile Practice	2PM—3PM
<b>May 19, 2023</b>	Open Work Session	2PM – 6PM ET
<b>May 22-24, 2023</b>	Content Creation Week	
<b>May 22, 2023</b>	Annette Choti: Overview of Where AI is Taking Content Creation & SEO Viveca Hess: Power Session on LinkedIn for Lawyers	2PM—5PM

## Course Schedule Summary

Date	Description	Time
<b>May 23, 2023</b>	Module 6	2PM – 5PM ET
<b>May 23, 2023</b>	Michael DJ Eisenberg: Podcasting for Lawyers	3PM—4PM
	Kerri Colby White: Using AI to Handle Google Reviews	4PM—4:30PM
	Kevin O’Keefe: How AI is Changing Blogging - Lexblog Tools for Solos & Smalls	4:30PM—5:30PM
	Scheduled Office Hours (book appt. in advance)	7PM – 10PM ET
<b>May 24, 2023</b>	Laura Cowan: Marketing a Law Firm with Webinars	2PM—3PM
	Sonia Lakhany: Referrals	3:30PM—4PM
	Jessica Flowers & Nicole Gaither: Everything You Need to Know About Law Firm Names and Branding	4PM—5PM
<b>May 26, 2023</b>	Open Work Session	2PM – 5PM ET
<b>May 30, 2023</b>	Module 7	2PM – 5PM ET
	Jackie Schafer: AI-powered legal tools and demo of Clearbrief.ai	3PM—4PM
	(LexReception Rep): Intake & Automation Systems	4PM—5PM
<b>May 30,2023</b>	Scheduled Office Hours (book appt. in advance)	7PM – 10PM ET
<b>June 1, 2023</b>	Module 8	
<b>June 2, 2023</b>	Welcome to Ownership (Ceremony TBD)	
<b>June 2, 2023</b>	Open Work Session	2PM – 6PM ET

## LAW FIRM START-UP AI-CCELERATOR

### Class Schedule:

NOTE: All segments are recorded, with office hours to ask follow-up questions

**Scheduled Office Hours** (will be blocked open until day prior to book an appointment)

Tuesday evening May 16, 23, 30, 7 pm - 10 pm ET

**Open work session** - come work on your law firm materials any time during this session, or book an appointment for office hours Friday May 12, 19, 26, June 2, 2023, 2 pm - 6 pm

*I will calendar each of these sessions and send invites so you can easily book them on your calendar. All classes to be held on zoom remote, with link provided before class starts.*

**May 3, 2023** - pre-released recorded and printed materials on ethics of starting a law firm and ethics of AI

**May 10 - first day live course, Module 1 Materials**

Time - 2 pm ET - 4 pm ET

Module 1: Introduction to Law Firm Ownership

- Overview: Why starting a law firm might be the right path for you
- Different Paths to Solo/Small Firm Practice
- Why Ownership is Having a Moment
- Benefits of Starting a Law Firm
- Overcoming Fears & Reality Check
- Why Lawyers Starting a Firm Without AI Are Already Behind

Module 1b: Introduction to Your AI, Your Digital Partner in Practice

- Overview of OpenAI and Iterations of ChatGPT

- Basics of How the Tech Works
- How AI/ChatGPT Are Being Integrated
- General Apps + Legal
- Bonus
  - Terms of Service Review
  - Legal Tech Company AI Updates
  - Ethics & Compliance (separate Module)

**May 11, 2023 - live class, 12 pm - 2 pm ET (Modules 2 & 3) (Module 2 and 3)**

Module 2:

- No Money, No Problem (really!)
- The Real Costs
- Do the Budget and the Math (and let AI help!)
- Financial Strategies
- Quick Cash Solutions to Stay Afloat

Module 3: Overview of Trends in Legal and Business Models

- Start Out
  - Alternative Billing
  - Flat Fees
  - Subscription Fees
  - Unbundled Services
  - Non-Profit Law Firm
  - Remote & Hybrid Practice
  - Non-Lawyer Partners & Owners
  - Law Firm Purchase Option - Is this feasible?
  - Legal Information Products
- End Game - Start With the End in Mind (some guest content)
  - Law Firm Sale
  - Close the Firm

- Reduce Size for an Annuity Practice
- Merger

**May 17, 2023, 2-4 pm ET – NOTE, this is an interactive work session class where we will be actively engaging in planning, mission statements and value-setting (Module 4 materials). Much of the content we generate in class will be directly transferable to your website and other copy.**

#### Module 4a: Planning

- Business Plan Alternatives
  - Pitch Deck
  - Business Canvas
  - SWOT Analysis
- AI Tools
  - Market Research
  - Drafting a Plan
- Values & Mission: Front Row Center
  - Mission Statement (let AI help)
  - How to Bake Client-centricity, DEI, ESG, Universal Access, A2J and Your Own Personal Values Into Your Firm's DNA
    - AI Tools
    - Guest lecturers and experts
  - Cross reference (web & tech design informed by values)

#### Module 4b: Planning Specific Scenarios (self-study)

- Biglaw to Yourlaw
- Government/InHouse to Your Firm
- Law School to Law Firm Ownership
- Unemployed/Re-Entry to Ownership

#### Module 4c: Planning - Substance Mastery

- Tips to Jump Start Subject Matter Mastery
- CLE, Lawyer-sponsored courses, Other resources
- AI Tools to Gain Subject Matter Mastery

- Two-in-One: Learning by Marketing

**May 18, 2022 12 pm - 2 pm, w/optional work session 2-3 pm (You will receive pre-recorded videos for many of these Module 5 tasks and we will review, discuss and set a schedule for completion. Optional 1 hour work session)**

#### Module 5: Ready, SetUp Go!

- Office or Not: Options
- Entity Selection and Set Up (AI-Assisted)
- FEIN
- Bank Account
- Electronic Payment Mechanism!!!
- Bar Admissions - existing or new?
- Insurance
- Tech Stack Selection (will include video set up recordings & demos)
  - Legal vs. General Tools?
  - Practice management & accounting
  - CRM
  - Legal Research
  - Communication tools
    - VOIP/Phone
    - Email
    - Client Portals
  - Full Graphic for all tools
  - AI Considerations
  - Integrations

#### Module 5b: Branding & Online Presence

- Quick Website Options
- Headshots (low cost & AI Options)
- Logo and Color Selection (with Canva & AI by your side)
- Web copy and design ideas (AI powered)
- Website TOS and Privacy Policy (AI-assisted)
- Business card and email signature options

- Google My Business Profile
  - Guest expert and hands-on set up
  - Finding reviews

#### Module 5c: Lawnch!

- AI-powered emails, press releases and posts
- Celebrate!

**May 23 - 2 pm - 5 pm ET** - content creation sessions in Module 6 (with pre-recording and homework released prior for class project)

#### Module 6: To Market, To Market General Concepts

- Ideal Client
- Consistency
- Intake Systems & List-Building
- Marketing Options Exercise (Marketing Cheat Sheets)
  - Traditional Marketing
  - Digital Marketing
    - Marketing Cheat Sheet Options
    - AI-powered marketing assistance for scripts, client guides, ebooks, course-creation, etc
  - Marketing Delegation: VAs, Law students & automation
  - Ethics issues (in Ethics Module)
- *Class Marketing Project*

**May 30, 2023 - 2 pm - 5 pm** Module 7 materials

#### Module 7: Law Firm Operations

- Managing Clients - the Journey
  - VAs, Intake Forms and System for Journey
  - Selection Criteria & REd F
  - Robust Engagement Agreements (Clauselt templates and book) (in class and homework)
  - Robust Client Policies (developing policies with AI and Canva)(in class and homework)



- Fees
- Alternative Billing Basics
  - Billable Hour
  - Flat fees
  - Subscription Fees
  - Contingency Fees
  - Hybrid Fees
- What's Your Risk of Getting Stiffed?
- Workflow, Doc Automation, System & AI? The new category killer?

### **June 1, 2023 - Delegation options and growth**

#### Module 8: Delegation Options & Growth

Human & AI Options

VAs & Contractors

### **JUNE 2, 2023 - Welcome to ownership (ceremony to be planned)**

#### **(pre-recorded material available for release)** Module 9: The Human Side of Law Firm Ownership

- Law Firm Culture and Professional Civility
  - Tone Correction with AI
- Getting the Personal Help You Need
  - Lawyer Assistance Programs
  - Coaching and Therapy
  - Supporting Colleagues
- Dealing With Health Issues
- Illness, Grief and Maternity Leave
- Your Spouse, Significant Other: Your Non-AI Partners in Practice
  - Fair Play Concept

## **BONUS MODULES**

Of Counsel/Local Counsel Module (recorded and released during course)

- The benefits of offering or retaining of counsel /local counsel
- Ethics ground rules for of counsel and local counsel engagements
- Best practices, including coordinating tech
- Sample template agreements for of counsel/local counsel

Bonus 2:The Ethics of Starting and Running a Law Firm (pre-course release)

Bonus 3: The Ethics of AI and ChatGPT in Law Practice (pre-course release)