



*The Akron Bar Association's Solo & Small Firm Section &
the CMBA's Small Firm & Solo Practitioner Section present*

2017 Small Firm/Solo Expo: Empower. Grow. Thrive

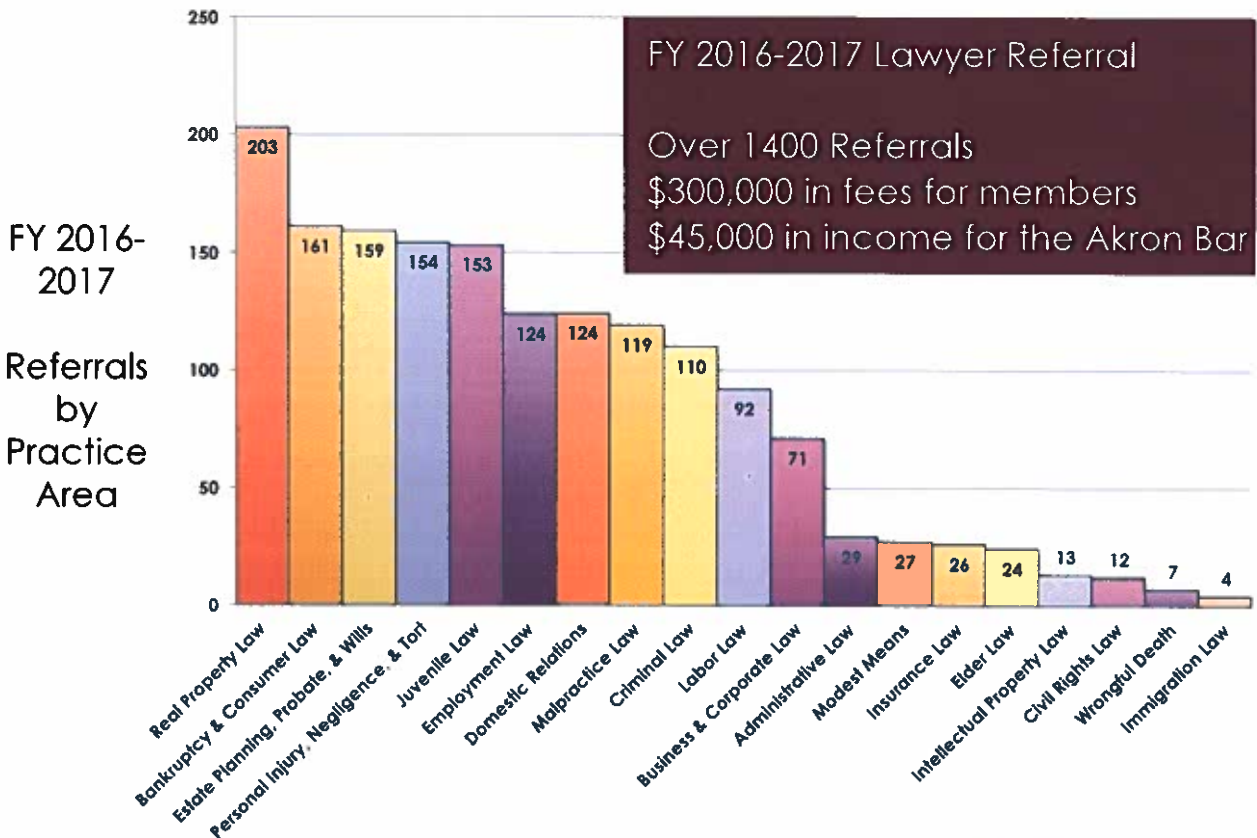
Friday, September 15, 2017 – 5.75 General CLE credits requested
Embassy Suites Independence, 5800 Rockside Woods Blvd., Independence, Ohio 44131

8:00 a.m.	Registration
8:25 a.m.	Welcome & Introductions
8:30 a.m.	The \$*#@# Client – Prevention, Relationships and Knowing When to Let Go Roni R. Sokol, The Sokol Law Firm LLC & Wesley C. Buchanan, Attorney at Law
9:15 a.m.	Show Me the Money: How to Get Paid, Creative Billing, Setting Fees, Knowing Your Value Regina Olbinsky, Pivot Growth Partners Jennifer Koiles Pratt, Esq., Koiles Law, Salem, MA
10:00 a.m.	Break
10:15 a.m.	The Downward Spiral: Taking Control of Your Inbox and Your Communications Lisa Crilley Mallis, Impactive Strategies
11:15 a.m.	LinkedIn for Lawyers Renee Sadauskas, Business Development Director, MediaSmack
12:00 p.m.	Lunch & Networking
12:45 p.m.	Best Practices for Financial Management Borbala Banto, CPA, Better Numbers For Lawyers
1:00 p.m.	Leveraging Social Media To Develop Client Leads Dianna M. Sudia-Smith, Law Office of Dianna M. Sudia Smith, LLC
1:30 p.m.	Tech Topic – Best Practices for CyberSecurity at Work Max W. Thomas, Max W. Thomas LLC
2:00 p.m.	Break
2:10 p.m.	Letting Go: How to Outsource (virtual legal assistants, receptionists, resources, interns, payroll, assistance with administrative aspects) Danny Spitz, Everstaff
2:45 p.m.	Cover This- Factors to Consider When Insuring Your Business Christopher R. Kakish, Client Executive – Property & Casualty, Oswald Companies
3:30 p.m.	Adjourn to Networking Reception



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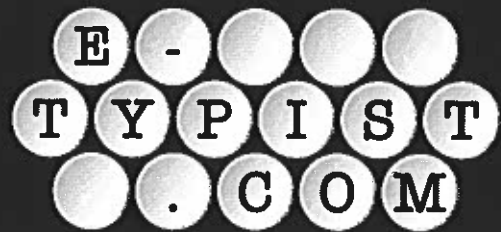


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2017 Small Firm/ Solo Expo: Empower. Grow. Thrive.

The \$*@# Client- Prevention,
Relationship and Knowing When
to Let Go

**Roni R. Sokol, The Sokol Law Firm LLC
Wesley C. Buchanan, Attorney at Law**

2017 Small Firm/Solo Expo:

The \$*#@# Client – Prevention, Relationships and Knowing When To Let Go

I. Client Interview: Your quickest chance to get out of it.

- A. How to determine if the client will pay.
- B. In a contingency case: how to determine if case will be profitable.



II. Client Expectations: It's important to know this right away.

- A. What are client goals for legal matter? Are their goals achievable?
- B. How do you manage client expectations?

III. When Relationship Sours – Potential Scenarios:

- A. Client gets frustrated that it's taking so long;
- B. Client fails to cooperate with discovery, depositions, etc., making it difficult to represent them.
- C. Client disagrees with your valuation of the case – client thinks case is worth much more than you do.
- D. Client refuses to pay.

IV. When do you fire the client?

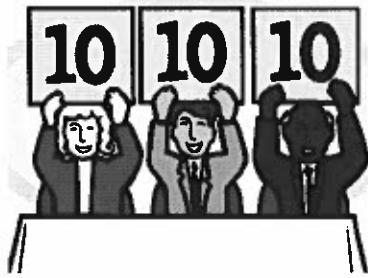
- A. When you cannot agree. Exs. You get an offer that you think is good, but client refuses to accept it.
- B. When they are being difficult. Exs.: demanding money immediately, calling incessantly, berating the attorney (ie. Screaming at you or treating you poorly).
- C. Threat of bodily harm, etc.

V. How do you fire the client?

- A. Suggest that perhaps they fire you and find a new attorney.
- B. Must inform them in writing and advise them of potential statute;
- C. Must immediately hand over their file.
- D. In litigation, motion to withdraw.



VI. How to get paid (or not) after client terminates you.



- A. Waive your fee and costs (sometimes it's better than the alternative).
- B. Lien letter to new attorney (get ready to fight over *quantum meruit*)
- C. Reasonable value of your services: how do you determine in a contingency case?
- D. Arbitration through CMBA – a long fight ahead (is it easier to just let it go?)