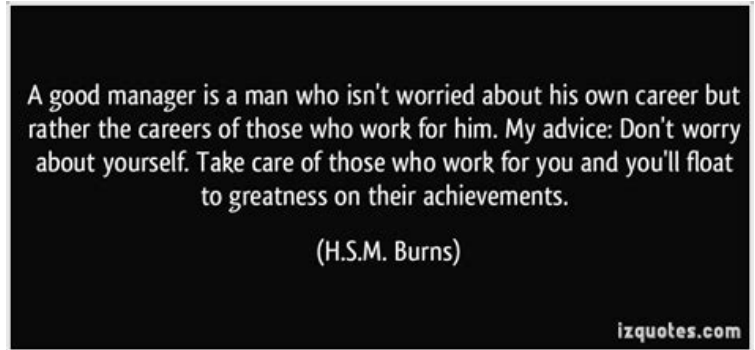


MANAGERS INSTITUTE

SYLLABUS AND WORKBOOK



PEOPLE

PROCESSES

PROGRAMS

MY PROJECT GOAL IS:

MANAGERS INSTITUTE

Advanced Training Program- Curriculum

Orientation- Introduction to Management

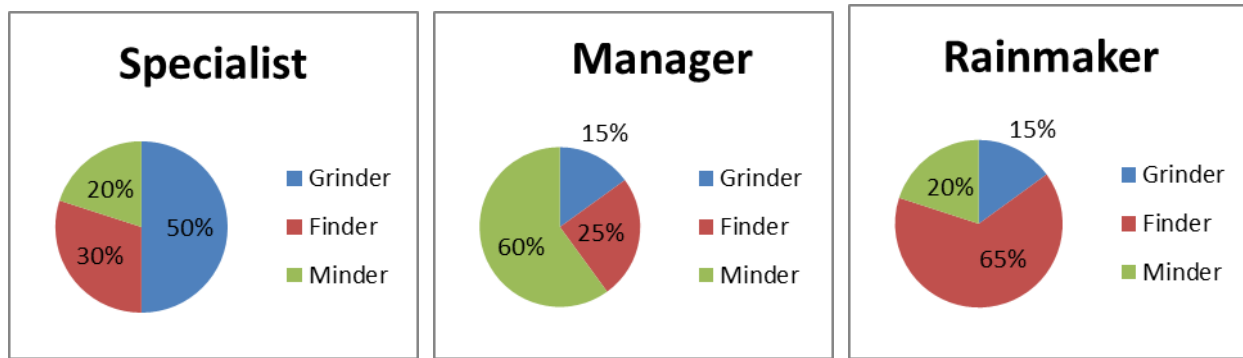
- Roles within the Firm and identifying if this institute is a good fit

Agenda

- People – Start up
- Processes – Accountability
- Programs – Marketing

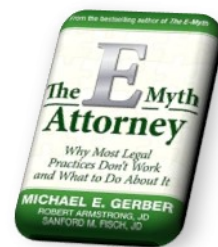
What you stand to get out of it

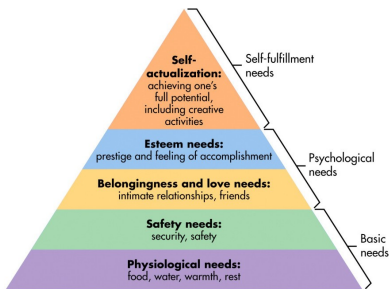
- Purpose and objective



Please Note: Before starting this program you MUST already have identified yourself as a manager within the firm and have reviewed the firm's Membership Guide, Start Up Guide, and Esquire Academy Curriculum. This will give you greater context for the material covered in the course of this training.

Required Reading: The E-Myth Attorney By: Michael Gerber, et al





STEP ONE - PEOPLE



Week 1: Building Your Team

Get to know your people

- Understanding Human Behavior in Management
- What motivates an individual (Maslow's Hierarchy of Needs)
- Two Way Communication
- Understand and be understood (feedback)
- Understanding Communication Filters
- Non-verbal Communication
- Passive Aggressive Interactions
- A person's why is found 5-6 questions deep.

The Recruiting/ On-boarding Process

- Where do we find them?
- Why do they want to join?
- What is the process to bring them on board?
- What is the expectation when they get started?

Your Team Roster

- How well is your team reaching its potential?
- Building your ideal team
- Great, Good, Gone
- Develop or Recruit?

Assignment:

Develop Your Top Ten Attorney List. Rank them in Great, Good, Gone. If you do not have 10 attorneys, list potential recruits either in actual names or possible resources to find these attorneys. Note: If you do not have any attorneys working for you, create a Top Ten Dream Team of who you want to recruit Be ready to discuss how you are going to develop Good attorneys or your plans for recruiting your next Great attorney

STEP ONE WORKBOOK ASSIGNMENT

Identifying Your Team Roster

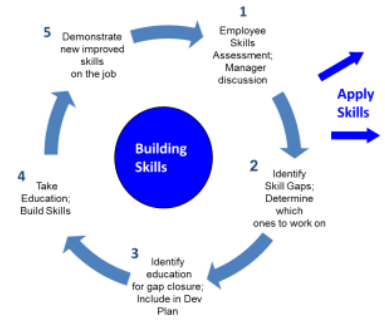
What does your management team look like?

	Attorney Name:	Describe their current performance and situation	How can you help realize more of their potential?
Superstars High Performers Average Performers	1.		
	2.		
	3.		
	4.		
	5.		
	6.		
	7.		
	8.		
	9.		
	10.		

Other Attorneys: Referral/ Reviewing Attorneys



STEP TWO - PROCESSES



Week 2: Managing Your Team

Setting Expectations

Leaders vs. Managers

Delegation

Why accountability is so important

SMART (Specific, Measurable, Achievable, Relevant, Timely) Goals

Firm Minimums

Keeping Your Team Accountable

Using the Business Dashboard

Regular Accountability Meetings

Reverse engineering goals

Setting benchmarks

Providing Motivation, Resources, and Accountability

Using Client Tether as a Tool for Attorney Development

Developing People

Communicate/ Evaluate/ Implement

Encourage, Praise, Recognize

Addressing Legal Questions

Addressing Personal Questions

Addressing Marketing Questions

Addressing Practice Development Questions

Assignment: Use your Dashboard and other resources to create a development plan for one or more attorneys. Be prepared to discuss goals, options, resources, and motivation techniques that you will use to get results.

Note: If you do not have any attorneys working for you, use your own dashboard and you will role-play a development plan for your "clone"

STEP TWO WORKBOOK ASSIGNMENT

	A	B	C	D	E	F	G	H	I	J	K
1			Month of:	Jan							
2			Days of Operation:	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	
3			Hours of Operation:								
4			No. of current Prospects:								
5			Contact Goal for week:								
6			Production Goal for Month:								
7											
8											
9											
10						No. Inventory (Leads):	2			Actual Clients (Paid Clients):	2
11						Total Potential Revenue	\$ 8,500.00			Actual Revenue	\$ 7,500.00
12											
13		Due Date	Markets (Allied Professionals):	Action Step:		Inventory (Leads):	Potential Revenue:			Actual Clients (Paid Clients):	Revenue:
14		1/3/2018	WFG	Call Jim re: trust		Jane Smith	\$ 5,000.00			Joe Smith	\$ 5,000.00
15		1/4/2018	Tom Jones	F/U with receiving client info		Kim Fisher	\$ 3,500.00			Cole Dales	\$ 2,500.00
16						Total	\$ 8,500.00			Total	\$ 7,500.00
17											
18											
19											

ATTORNEY DEVELOPMENT

DO A PERSONAL ASSESSMENT OF THE ATTORNEY ON YOUR OWN

DISCUSS YOUR ASSESSMENT WITH THE ATTORNEY. WHERE DO YOU AGREE? WHERE DO YOU DIFFER?

IDENTIFY THE GAPS BETWEEN POTENTIAL AND CURRENT SITUATION

HAVE THE ATTORNEY SET AN ESTATE PLANNING GOAL.

WHAT IS A GOOD MOTIVATION TO ACHIEVE THIS GOAL (WIIFM)?

WHAT EDUCATION DO THEY NEED TO ACHIEVE THIS GOAL?

WHAT RESOURCES DO THEY NEED TO ACHIEVE THIS GOAL?

WHAT ARE THE POSSIBLE OBSTACLES THAT CAN PREVENT THEM FROM ACHIEVING THIS GOAL?

HOW CONFIDENT ARE THEY THAT THEY WILL BE SUCCESSFUL?

TEAM DEVELOPMENT

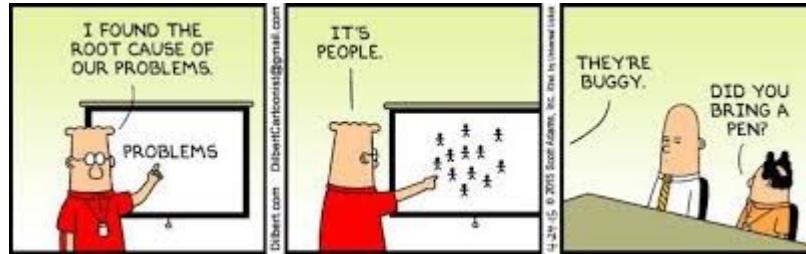
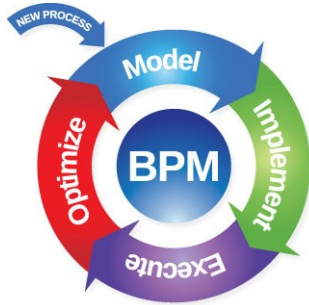
DO YOUR ATTORNEYS KNOW THE PRACTICE AREAS/SPECIALTY OF OTHERS ON THE TEAM?

HOW WELL DO YOUR ATTORNEYS KNOW EACH OTHER?

WHAT ACTIVITIES CAN THEY WORK ON TOGETHER?

SET A SMALL TEAM GOAL AND ASSIGN EACH ATTORNEY A ROLE IN THAT GOAL—HAVE A REWARD FOR SUCCESSFUL COMPLETION

STEP THREE - PROGRAMS



Week 3: Managing Your Region

Building Momentum for Your Team

- Your role as rainmaker
- Working with WFG
- Building relationships/ establishing the brand locally
- Building to the strengths of your team

Getting Things Off Your Plate

- The art of delegation
- When to delegate
- What to delegate
- How to assess if delegation is working
- Delegating WFG

Managing Projects to Build Your Region

- What is the Big Picture?
- Identifying steps toward larger goal
- Charting the plan and sub-plans
- Establish goals and get buy-in from the team
- Using resources- Dashboard, Marketing toolkit, attorney list, firm resources, others
- Coordination before the event
- Coordination during the event and roles
- Coordination after the event
- Evaluating effectiveness
- Understanding Pivoting ("All War Plans are Perfect until the First Shot is Fired")

Assignment: Develop a Project and list all the objectives, plans, resources, attorney assignments, marketing, and other firm resources that you will use to successfully execute the project. This should be a project that you can complete in 3-6 weeks

STEP THREE WORKBOOK ASSIGNMENT

Developing Your Regional Marketing Plan

Sample Management Project-

What is the overall goal that you want to achieve?

Chart out the projects that will be needed to achieve the goal

Pick one of the projects and make that your assignment

Who, What, When, How

What criteria will you use to determine effectiveness?

Who will you work with to design your project?

Who will be your Devil's Advocate?

How will you implement the plan?

What Resources (Tools) will you use to implement the plan?

How will you follow up on the plan?

Who will you rely upon to determine effectiveness?

What will you do to provide motivation to have a successful outcome?

FOLLOW UP

Over the next three weeks, you will contact Glen/Gary to review your project and provide updates on where you are at. As you are doing your reviews, write down any feedback or follow up assignments.

WEEK ONE FEEDBACK NOTES:

WEEK TWO FEEDBACK NOTES:

WEEK THREE FEEDBACK NOTES: