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## Scaling your law firm

SOLO PRACTICE HAS MANY CHALLENGES, AND THOSE CHALLENGES MULTIPLY AS YOU GROW

Growing and scaling a practice from a single case to hundreds, even thousands of cases, can be daunting for any attorney, seasoned or not. It takes grit, determination, and a great deal of organization to scale your practice efficiently and effectively. But doing so does not have to wear you down.

Most lawyers are emboldened when they start their firm. With only a few cases at hand, it is relatively easy to keep track of deadlines, tasks, client communications, and so forth. But after a few years of hard work, their case load may increase by ten times or more. Cases will (hopefully) start to flood in. Unfortunately, some lawyers believe that scaling a law firm is *only* about massive client acquisition. That is only one piece of the puzzle. If the firm's foundation is not laid properly, the system will break.

Without proper systems in place, the lawyer will become inundated with repetitive tasks that, if left untouched, will create problems in the form of malpractice and other negative consequences. Within these systems, everyone must play their functioning role so that the machine runs properly. Scaling a law firm requires an ability to define these roles and automating them so they can be duplicated with simplicity.

Luckily, the advent of technology can ease the attorney's workload and offset repetitive tasks so that he or she can focus on being a lawyer. The various forms of technologies that a lawyer can use to help scale their practice is not just limited to email and phone lines. Intake-management software, case-management programs, communication tools, and staffing services provide the attorney the best chance at scaling their law firm fast and effectively.

### Focus

Often, new lawyers will set up shop with multiple different practice areas,

hoping to bring in various income streams. While I am not critical of any law firm that practices multiple areas of law, I do believe it is significantly more difficult to initially scale a firm that does so. Different areas of law require different repetitive tasks. Since automating repetitive tasks is the cornerstone of scaling a law firm, it is increasingly difficult to do so when you must formulate more than one system simultaneously.

**Pointer:** Focus on scaling one practice area before you move on to the next.

### Marketing

I need more cases! Any lawyer who has started their own law firm has probably muttered these words (or screamed it).

To scale your practice, you need cases to work on. When starting out, the attorney may rely on their friends or family to supply a few cases here or there. But that is not a sustainable business model. And the purpose of this article is not to teach you how to get cases (that could take a whole textbook). But if there is one concept we would like you to take away from this article, it is that marketing is a proactive endeavor. You cannot sit back, and hope cases start to fall into your practice.

There are multiple platforms to obtain cases. These include Google, TikTok, Facebook, YouTube, Instagram, search engine optimization tactics, and other various companies that provide pay-per-lead services. Unfortunately, you need to spend money to make money. And nothing is truer than attorney marketing. It is no lie that attorney advertising is a cutthroat and competitive market. However, be extremely wary of marketing companies who promise "Get Cases Now for Cheap" schemes. They are usually money-hungry pits that suck you dry. You can lessen the chance of getting screwed

over by taking the time to understand and research how search engine optimization, pay-per-click ads, and other various marketing platforms work. Then, if you do hire an outside marketing agency, you understand their language and can hold them accountable for their work.

The most powerful marketing tool the scaling law firm has are paid ads. Paid ads allow the scaling law firm to acquire clients fast and to directly target the most desired markets. Organic marketing (creating blog articles, video content, etc.) is effective, but only in the long term. But paid ads are not inexpensive. The best platforms, in our opinion, that tend to favor lawyers are Google, TikTok, Facebook, and YouTube. Again, you must spend money to make money. And nothing will help scale a law firm faster than paid ads.

### Intake management

Once your practice is booming, making sure you speak to every prospective client that comes through your door will become messy unless you have a specific protocol in place. It is unrealistic for the managing attorney to pre-screen dozens of clients per day and continue to provide legal services at the same time. It is therefore vital to create a detailed questionnaire that obtains all the necessary information from prospective clients so that the attorney can make decisions on second-round intakes quickly. Another important consideration is that the attorney should have a database of their intakes if they ever need to refer to previously screened clients.

There are various applications that the attorney can utilize to make this efficient. Our firm uses Clio Grow for our intake management. With Clio Grow, our staff can intake prospective clients directly on the platform. From there our attorneys can monitor the status of each prospective client. For example, you can update the status of each lead as retained, referred out,

monitoring for ripeness, not qualified, etc. The importance of being able to oversee the status of each prospective client is that your firm will not lose out on any potential clients.

Intake management, however, is not just about being able to track your leads. The most important aspect of lead management is automation. Automating your firm's workflow from having a prospective lead contact you up to the point of client signup and document collection is vital to scale as fast as possible. Ideally, all of this can be done from one platform.

### Case-management software

Any litigator will probably tell you that managing deadlines, retrieving communication records, and time-tracking is the most needless and time-consuming aspect of their job. However, the problems associated with these tasks can be mitigated by using technology. By employing case-management software, litigators can track their hours, keep notes of communication with opposing counsel and clients, and oversee their paralegal's work all in one place. Scaling is impossible if you are spending hours looking for files, cross-referencing multiple spread sheets, and keeping post-it notes on your desk. Speed and efficiency, without sacrificing work quality, are where case management software will assist you.

Choosing the right case-management software is dependent on your firm's needs. The list of capable case management software programs includes, but is not limited to FileVine, Clio Manage, ActionStep, Firm Central, and many more you can find with a simple Google search. Do not choose the first program you come upon. From personal experience, our firm went through three different case-management software programs until we found the right fit. Even then, the software takes a great deal of customization to comply with your firm's requirements and you will become very invested in the program you have chosen.

With scaling, turnover is ever present. People come and go. To continue law-firm growth, new and current staff members must be able to pick up where

others left off. That is another key component of case-management programs. They allow you to take detailed notes of the various procedural and substantive progressions in cases and work on documents among team members. That way, if one member of your team departs for any reason, the next person up can catch up to speed quickly.

Can you survive without case-management software? Maybe at the beginning. But once your practice grows, it will be impossible to scale if you are not organized.

**Pointer:** Start using case-management software early or as soon as possible. It is much more difficult to retroactively input information into the software once you have more than 50 cases.

### Communication tools

It is simple to communicate when an office is comprised of one lawyer and a legal assistant. But it's much more difficult when the organization includes 20 or more team members. It is surprising to us how many law firms still rely on email as the sole tool for communication. But luckily, there are various communication platforms that can allow for ease of communication within your firm.

Slack and Microsoft Teams are useful, easy-to-use tool for intra-office communications. Zoom and Skype are suitable for video communication with clients, opposing counsel, and even for litigation-related tasks. Asana is especially useful for assigning, managing, and/or organizing tasks. These platforms are similar and dissimilar in their own nuanced ways, but all are effective in helping manage communications. The key takeaway is that communication among your staff and third parties should be seamless.

### Firm culture and staffing

The most difficult task of the scaling law firm is efficient staffing. Scaling requires the best talent and resources to maximize your case load. Attorneys, paralegals, and support staff that buy into

your firm culture is paramount. Creating a positive, collaborative, and innovative firm culture will make the growing staff members feel like a team, which will always lead to better work product. Here at our firm, we encourage open communication from the ground up. No one team member's voice is unimportant and most suggestions on firm improvements are taken into consideration.

Staffing is essentially broken into two categories: in-house staff members and outsourced staff members. I believe that in-house staff should be reserved for the most talented roles such as associates, paralegals, and case managers. However, the biggest pitfall most scaling law firms run into is when their talented staff is engaging in repetitive and tedious tasks. That is where virtual-receptionist services can play a crucial role.

Virtual-receptionist service companies outsource employees from around the world. These outsourced staff members are usually more cost effective than in-state employees. Outsourcing with virtual staff will also allow you to staff up much more quickly.

### Create training manuals and videos

Staffing and hiring are only a few solutions to scaling your law firm. Having a large staff is useless unless they are trained. However, it is unrealistic to think that a single person can train staff proficiently one-by-one, especially when the scaling law firm is hiring multiple people for the same position. This is where creating standardized training manuals and videos can drastically help.

Our firm records (with all participants' consent) every training we do via Zoom. From intake, pre-litigation, to litigation, we usually choose one topic to discuss and record the video so that future employees can refer to the training without the need to do it again. We also create detailed manuals for each step of a case's life (intake to pre-litigation to litigation).

### Build partnerships

As the scaling law firms grows, the types of services it will need will continue to grow as well. With an increased payroll and staff,

the services of a human resources partner may be needed. With increased costs, an in-house bookkeeper may be valuable. With a growing docket of cases in litigation, partnering with a trial law firm (there are many advertising in this magazine) can help ease the load of a jury trial. The first step, however, is to realize that these tasks cannot be done by one person alone. Delegating work to complementary professionals allows the managing partner the flexibility to grow without getting bogged down.

**Adapt, adapt, adapt**

Scaling your law firm is not a one-step process or an overnight venture. It

takes years of ongoing improvements, adjustments, and tweaks to get to a place where you feel somewhat established. You will face adversity every step of the way, but you will not be able to tackle that adversity without adapting to various changes in technology, employee needs, and other business-related changes. For example, there is a great deal of talk about how artificial intelligence (AI) is going to change the legal landscape. While our firm is skeptical about the extent to which AI will replace us, we are confident it will be used more and more as a tool to help scale our firm.

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