

SMALL FIRMS & SOLO PRACTITIONERS CONFERENCE



**MAY 5, 2023
8:40 AM - 2:15 PM
DOVER MOTOR SPEEDWAY**

4.5 HOURS CLE CREDIT INCLUDING 2.8 HOURS ENHANCED ETHICS CREDIT FOR DELAWARE ATTORNEYS
AND 2.5 HOURS ENHANCED ETHICS CREDIT FOR PENNSYLVANIA ATTORNEYS

ABOUT THE PROGRAM

Dedicated to YOU, the solo or small firm practitioner, this conference is curated to address topics and issues you face running your practice. The Small Firms section is the largest in the Delaware State Bar Association and represents the vital and growing segment of Delaware's legal community. Our topics have been selected with input from the section to help attorneys address the unique challenges they face and to learn from experts and peers about running an effective, efficient and sustainable practice.

This year, the conference will include a ride along experience with driving experts of the Dover Motor Speedway! Sit back and hold tight as you ride shotgun in the passenger seat or back seat with a professional driver for 3 laps of "Monster Mile". This exclusive experience is built in to the cost of the CLE and will immediately follow the conference!



**Presented by The Small Firms and Solo Practitioners Section
of the Delaware State Bar Association**

Visit <https://www.dsba.org/event/the-grand-prix-of-small-firms-and-solo-practitioners-conference-2023/>
for all the DSBA CLE seminar policies.

Please note that the attached materials are supplied by the speakers and presenters and are current as of the date of this posting.

SMALL FIRMS & SOLO PRACTITIONERS CONFERENCE

Moderator

Jimmy C. Chong, Esquire
Chong Law Firm, P.A.

Chair, Small Firms and Solo Practitioners Section

Program

8:15 a.m. – 8:40 a.m. | Registration Breakfast

Gas 'N' Go

8:40 a.m. – 8:45 a.m.

Start Your Engines

Opening Remarks from Small Firms and Solo Practitioners
Section Chair

Jimmy C. Chong, Esquire
Chong Law Firm, P.A.

8:45 a.m. – 9:45 a.m.

Increasing Your Firm's Horsepower

This panel will hear from Accel Marketing Solutions, Inc. which specializes in law firm marketing, websites, educational legal content, social media marketing, video production, pay per click, reputation management, etc. Learn all the techniques to push the pedal to the metal for your firm.

Phil Bolton
Vice President of Accel Marketing Solutions, Inc.

9:45 a.m. – 10:45 a.m.

Waving the Red Flag

Phishing Scams and Cyber Security-Are you playing by the rules for internet advertising and cyber security? Hear about updates on current scams and professional responsibility. Keep your office and staff protected and yourself out of the disciplinary office!

David A. White, Esquire
Office of Disciplinary Counsel

Charles Slanina, Esquire
Finger & Slanina, LLC

Jessica L. Tyler, Esquire
Office of Disciplinary Counsel

10:45 a.m. – 11:00 a.m. | Break

Pit Stop

11:00 a.m. – 12:00 p.m.

Getting Out of the Race

The Next Chapter and Succession Planning- Hear from these two about the tips and strategies to set yourself up for success and what to expect. Ask all your questions!

William W. Erhart, Esquire
Estate and Elder Law Services

Carol Waldhauser
Former Executive Director of DE-LAP

11:45 a.m. – 12:30 p.m.

Tune- Up Time!

Lunch & Mingle with Exhibitors

12:30 p.m. – 1:15 p.m.

Alone at the Front

Growth Mindset: How your firm can grow sustainably and intelligently- In order to get your firm to its ideal state, you must examine both the business of law and the practice of law as well as successfully implement scalable systems and processes that can grow with your firm. It's important to honestly assess your firm now and envision your firm of the future. Developing solid Standard Operating Procedures, generating and analyzing critical reports, and intentional automation are keys to firm growth. Lastly, regularly measuring success is critical in recognizing when adjustments in goals or direction are necessary.

Mary Ellen Murrah
*Strategist and Operations Consultant,
Vista Consulting Team*

1:15 p.m. – 2:15 p.m.

Getting to the Finish Line

Ins and Outs of ADR- Hear from this dynamic duo on effective dispute resolution to help parties reach the finish line.

Bernard G. Conaway, Esquire
Conaway-Legal LLC
Yvonne Takvorian Saville, Esquire
Weiss, Saville & Houser, P.A.

2:30 p.m.

Vroom, vroom!

Ride along with a professional driver
on "Monster Mile"! (See page 1)



Moderator

Jimmy C. Chong, Esquire

Chong Law Firm, P.A.

Chair, Small Firms and Solo Practitioners Section

Jimmy was born and raised in New Castle County, Delaware and his parents immigrated to America from South Korea. He is the founder of the Chong Law Firm, PA which has offices in Wilmington, Philadelphia and Lansdale, PA. His practice focuses on Plaintiff Personal Injury representation but he has handled cases in many different fields of law.

He is a certified mediator and arbitrator through the Superior Court of New Castle and he is a member of the Hearing Committee for the Pennsylvania Supreme Court Disciplinary Board. He is the Chair of the Small Firm and Solo Practitioner committee and the Secretary to the ADR committee of the Delaware State Bar Association. Additionally, he is a member of the House of Delegates for the Pennsylvania Bar Association and member of the Council of Mediators in Pennsylvania.

He earned a BS in Business and BA in Economics from Bucknell University, JD from Widener University, and Estate Planning Certificate through the LLM Graduate Tax Program at Temple University Beasley School of Law.

Outside of the practice of law, he was appointed to the Human Relations Commission in Lower Gwynedd Township, a member of Congresswoman Madeleine Dean's Racial Advisory Committee and he is a member of Gwynedd Mercy University's President Council. He sits on the board of directors for Montgomery County's Workforce Development Board, the Philip Jaison Memorial Foundation, Penn Asian Senior Services (PASSi), Montgomery County Community College Foundation, and the Montgomery Bar Association.

Jimmy is married with three children. He has coached youth soccer and ran multiple half marathons during his free time. He is involved in community events and was awarded the Horace A. Davenport award for his activism to further diversity, equity and inclusion.

Start Your Engines

Opening Remarks from Small Firms and Solo Practitioners Section Chair

Jimmy C. Chong, Esquire
Chong Law Firm, P.A.

Increasing Your Firm's Horsepower

Phil Bolton

Vice President of Accel Marketing Solutions, Inc.

Waving the Red Flag

David A. White, Esquire
Office of Disciplinary Counsel

Charles Slanina, Esquire
Finger & Slanina, LLC

Jessica L. Tyler, Esquire
Office of Disciplinary Counsel

David A. White
Chief Disciplinary Counsel, Office of Disciplinary Counsel,
Delaware Supreme Court

Mr. White is a frequent speaker/moderator in the areas of legal ethics and Alternative Dispute Resolution. In March 2021, the Delaware Supreme Court appointed Mr. White Chief Disciplinary Counsel of the Office of Disciplinary Counsel (“ODC”), and Arm of the Court.

The ODC, which functions as an educational and professional resource for members of the Delaware bar, receives, evaluates, investigates, and when necessary, prosecutes complaints of lawyer misconduct and the unauthorized practice of law. The Office also recommends sanctions for attorney misconduct to the Board on Professional Responsibility and the Court.

Previously, Mr. White was in private practice and was the office managing partner in the Wilmington, Delaware office of McCarter & English, LLP. There, he was a member of the firm’s business litigation, products liability, and bankruptcy practice groups. A substantial portion of his practice was devoted to ADR and representing lenders in the areas of commercial loan workouts, commercial litigation, commercial real estate, and related bankruptcy issues.

Mr. White was a Superior Court Commissioner from 2001-2008 and for several years he taught a civil litigation course for the University of Delaware, Division of Professional and Continuing Studies, where he was awarded Excellence in Teaching awards in 2007 and 2008.

Mr. White has served on the Executive Committee of the Delaware State Bar Association for many years and he is also an Honorary/Volunteer member of the Professional Guidance Committee.

Education:

Widener University School of Law, J.D 1986

University of Delaware, B.A. 1982

Charles Slanina

Finger & Slanina, LLC



Charles Slanina, a native Delawarean, graduated from the University of Delaware and Catholic University School of Law. He is admitted to the Bars of the Supreme Court of the State of Delaware, the United States District Court for the District of Delaware, the United States Court of Appeal for the Third Circuit, and the United States Supreme Court.

Upon graduation from law school, Mr. Slanina was the sole law clerk for the Delaware Family Court statewide.

He then joined the Delaware Department of Justice. During his eight-year tenure as a Deputy Attorney General, he headed civil and criminal trial units, including the Family Court, Medicaid Fraud and Patient Abuse Unit, and represented state administrative agencies while prosecuting high profile criminal cases.

Mr. Slanina next spent four years at the Office of Disciplinary Counsel as the Chief Disciplinary Counsel, investigating and prosecuting violations of the Rules of Professional Conduct as well as Unauthorized Practice of Law matters.

He has been in private practice since 1993. That practice has included plaintiffs' tort, insurance and toxic tort defense, civil litigation and family law. He has also defended high profile criminal cases, including matters drawing international media attention.

His practice currently focuses on professional responsibility counseling and defense. Mr. Slanina provides ethics advisory opinions for many Delaware, national and international firms and testifies as an expert in professional responsibility matters in Delaware, Pennsylvania and New Jersey courts. In addition, he has served as a special prosecutor for the New Castle County Ethics Commission.

Mr. Slanina is a frequent speaker on legal ethics and professional responsibility topics at seminars and conferences sponsored by the Delaware State Bar Association, Delaware Trial Lawyers Association, University of Delaware Academy of Lifelong Learning, Superior Court Trial Practice Forum, Delaware Supreme Court Pre-Admission Conference and has also been an adjunct professor at Widener University School of Law.

He is the author of "Ethically Speaking," a monthly column discussing legal ethics issues, published in *The Journal*, the magazine of the Delaware State Bar Association. Mr. Slanina is a member of the American Bar Association, the Delaware Bar Association, the Association of Professional Responsibility Lawyers and the Rodney Inns of Court, where he has served as President. Martindale-Hubbard has rated Mr. Slanina as AV for legal ability and ethical standard based on peer review and in 2004, was named one of Delaware's "Top Power Attorneys" in *Delaware Today* magazine.

JESSICA L. TYLER

Jessica Tyler is currently Deputy Disciplinary Counsel for the Supreme Court of the State of Delaware. Prior to that appointment, Ms. Tyler spent 10 years in private practice where she represented individuals and businesses in the defense of civil litigation involving automobile accidents, premises liability, general liability, and products liability. Prior to private practice, Ms. Tyler served as a judicial law clerk for Judges Buckworth and Conner in the Family Court of the State of Delaware. She previously was a member of the Delaware Civil Clinic where she worked with Delaware Volunteer Legal Services to assist clients with obtaining Protection from Abuse Orders and custody of their children. Ms. Tyler also interned with the Camden County Prosecutor's Office and the Pennsylvania Attorney General's Office, Bureau of Consumer Protection. Ms. Tyler is a graduate of Arcadia University and Delaware Law School.

Getting Out of the Race

William W. Erhart, Esquire
Estate and Elder Law Services

Carol Waldhauser
Former Executive Director of DE-LAP

Bill Erhart is the only Certified Elder Law Attorney in the state of Delaware. He is certified by the National Elder Law Foundation; Accredited by the American Bar Association. He practices estate planning, asset protection and elder law at Estate & Elder Law Services. He served in the Marine Corps during the Vietnam War and graduated from the University of Delaware, the Reformed Episcopal Seminary and Rutgers School of Law. After a clerkship in Delaware Superior Court he was a prosecutor for the Delaware Department of Justice for five years in consumer fraud and major litigation.

He has been named top Elder Law Attorney by his peers for the past twelve years in Delaware Today magazine. He is rated AV Preeminent by Martindale-Hubbell® Peer Review Ratings™, in Super Lawyer Magazine and Superb by AVVO.

He is a member of WealthCounsel, the National Elder Law Foundation, the National Association of Elder Law Attorneys, ElderCounsel, the American Bar Association (Real Property, Trust & Estate Section), the Delaware State Bar Association (Elder Law Section; Trusts & Estates Section) and was Chair of the Elder Law Section. He has practiced law for 40 years and has taught numerous seminars to lawyers, financial professionals and consumers.

William W. Erhart, Esquire

Certified Elder Law Attorney

Estate & Elder Law Services

Red Clay Center at Little Falls
2961 Centerville Road, Suite 350
Wilmington, DE 19808

Phone: 302-651-0113

Email: Info@eaels.com

Website: www.eaels.com

The Road Ahead:

Your practice is your life's work.
How do you maximize its value?

Presentation for the Small Firm Section



www.EAELS.com

William W. Erhart

Certified Elder Law Attorney

- ☐ Certified Elder Law Attorney: National Elder Law Foundation, Accredited by the ABA
- ☐ United States Marine Corps
- ☐ University of Delaware, Reformed Episcopal Seminary, Rutgers University School of Law
- ☐ Past Chair Elder Law Section – Delaware State Bar Association
- ☐ Top Lawyer in Elder Law Delaware Today 2012-2022
- ☐ Deputy Attorney General Delaware Department of Justice
- ☐ Rated AV by Martindale Hubble
- ☐ Rated Superb by AVVO 10 out of 10
- ☐ Rated in Elder Law by Super Lawyer Magazine

Numerous Seminars Presented and Articles written



Disclaimer

The information is solely for informational and educational purposes. None of the information should be construed for legal, tax or other professional advice. Nothing should be used as legal, tax, investment or other professional advice.

The discussions are general in nature and not person specific. Laws vary and are subject to change.



**Estate &
Elder Law**
SERVICES



**Estate &
Elder Law**
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Why Have an Exit Strategy?

1. No Plan, No Action
2. Provides stability for everyone at the firm
3. Allows time to think through options
4. Allows time to understand and maximize value
5. Provides time to identity successor
6. Time for successors to develop funding

Basic Suggestions

Three Key Elements for Every Plan

1. Establish a practical Exit Strategy (measurable and timed) that is thought out and tested.
2. Listen to other law firm owners and how they are planning with transition.
3. Take time to think through and discuss the important transition scenarios.

Exit Strategy Process

1. Understand options & develop Vision
2. Identity Assets & Baseline Value
3. Funding Your Exit
4. Build & Execute a Roadmap



Exit Strategy Terms

Exit – Your final departure from the firm

Transition – the point you (the exitor) shift primary responsibility to successor and start winding down

Sale – Transfer of ownership to successor/buyer



Lots of Options: What is your path?

Sell Practice

Hire Successor

Close the Doors

Transfer Clients

Merge with another firm

Become of Counsel [Whatever or however you define that]



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Exit Strategy Scenario

Take some time to set out in a short list:

My Exit Strategy

1.

2.

3.

4.



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Future Scenarios to Consider

1. Succession with Buy Out
2. Sell Practice
3. Firm Merger with Exit
4. Of Counsel Options
5. Transfer Book, then Exit
6. Act as pure shareholder, Hire Manager/CEO
7. Walk Away

Exit Strategy Transition Timeline

- How much time do I have to prepare?
- How do I value my practice?
- How do I increase the value between now and exit?
- Where do I find and how to develop a successor?

Exit Strategy Transition Timeline

- Age today _____

Began transition: Date/Age _____

Exit the Practice. Date/Age _____

Exit Concerns & Considerations

- Financial
 - Emotional
 - Partners
 - Relationships
 - Physical
- Infrastructure
Professional
Team
Other

Next Steps: in 90 Days

Draft your Exit Strategy Vision

One thing to minimize or eliminate a consideration or concern?

Determine a baseline value of your firm

Identify the assets and drivers of the true value of your firm;

Create a game plan to improve those assets.

Resources

Brokers who find buyers and sellers for law firms

Coaches who teach and help you enhance your firm's value

Articles on valuation of law firms

Consultants

Contact me and I will send you this information



Thank You

William W. Erhart, Esq.

Certified Elder Law Attorney

Estate and Elder Law Services

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Wilmington, DE 19808

(302) 651-0113

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**Estate &
Elder Law**
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www.EAELS.com



**REFUSE TO ACT YOUR AGE;
BUT PLAN ACCORDINGLY**

*Carol P, Waldhauser, CIEAP,
CWIC, (former DE-LAP, LLC
EXECUTIVE DIRECTOR)*

Outline:

WHAT ATTORNEYS NEED TO KNOW FOR
SUCCESSION PLANNING AND BEFORE
THEY RETIRE

PSYCHOLOGICAL PITFALLS AND
OPPORTUNITIES

RETIREMENT – BE PREPARED TO ENJOY

SUGGESTED READINGS/links



keep
GOING

**How Long Can I
Keep Doing this?**

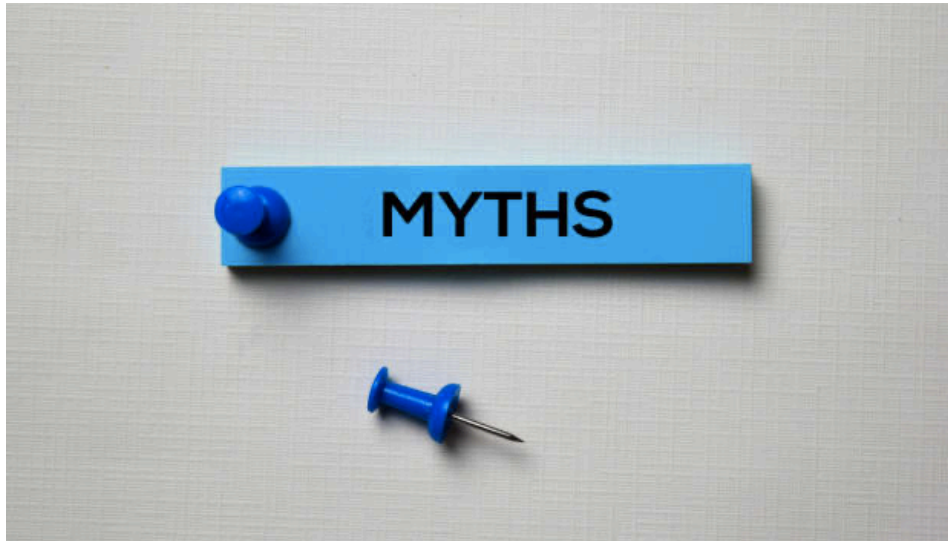
**Take the time to
Reflect & Prepare
Now!**



- *Remember there is as much planning to take down the shingle as it is to put it up.*

"I have always said if there ever came a day when I could no longer meet my duties and expectations as Apple's CEO, I would be the first to let you know. Unfortunately that day has come." Steve Jobs' August 2011

AN ASTUTE ATTORNEY PLANS.....



- Bad things happen to other lawyers;
- I am strong: I can handle my law practice when and if disaster strikes
- I'll do that tomorrow
- I have malpractice insurance; that is my preparation
- If I don't think about it, then there is nothing to be concerned about!

THIS IS why some lawyers do not plan:

Many lawyers struggle with succession planning and/or retirement because their identity is so closely tied to their work that they have difficulty stopping their work.

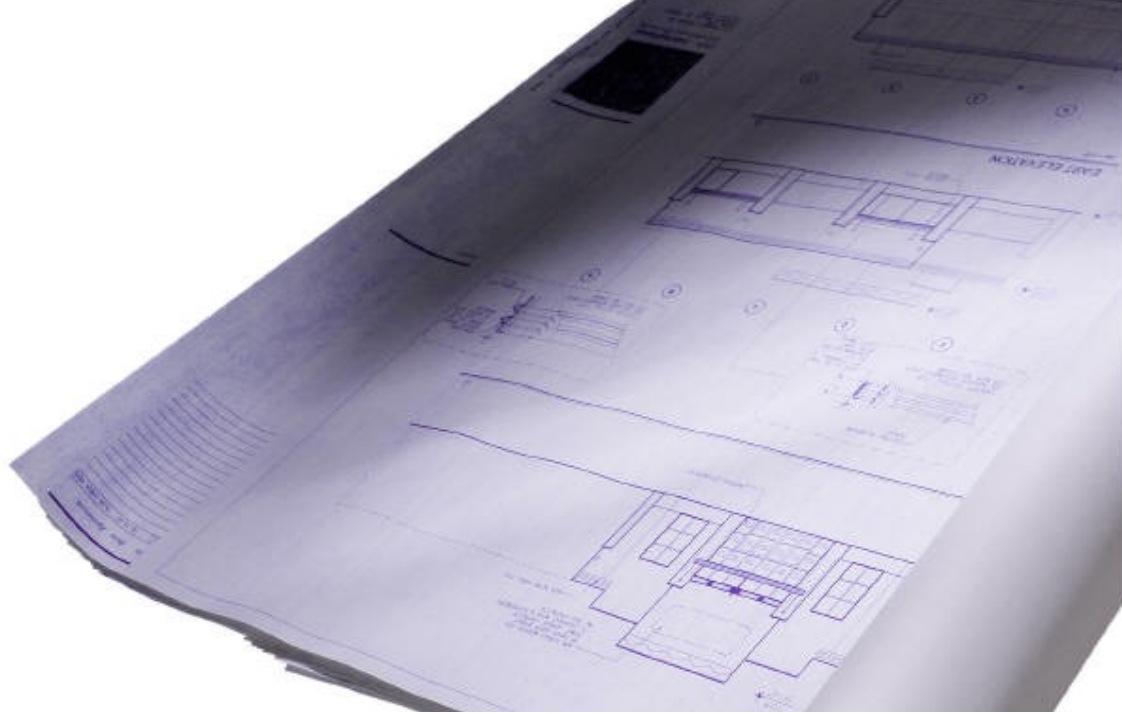
Remember, history has shown that the most important gift we can give ourselves is the gift of “being prepared”.



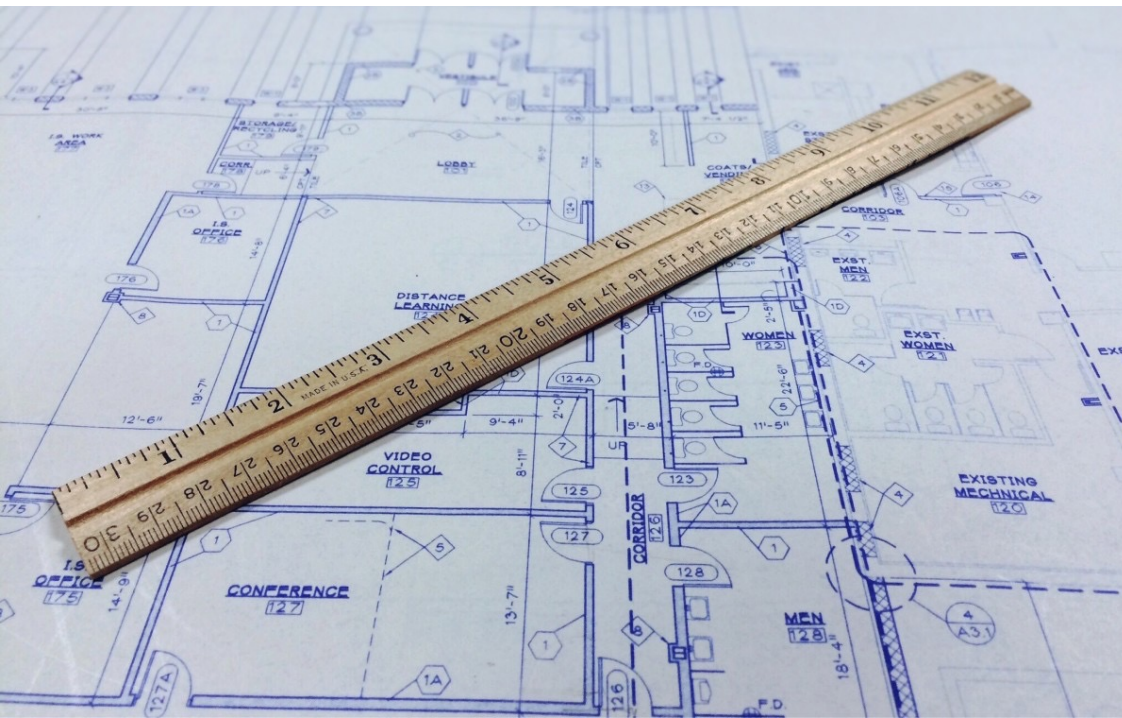
Other Concerns:

- 1. Projecting long-term financial needs.**
- 2. Living without a paycheck**
- 3. Investing – when- where -how**
- 4. Loss of professional identity**
- 5. Lack of structure**
- 6. Lack of intellectual stimulation**
- 7. Loss of social interactions**
- 8. Loss of opportunity to use professional skills**
- 9. Uncertainty about how to spend one's time**
- 10. Maintaining one's self-identity**





Designing Your Blueprint For Change



OUTLINE

- 1.Change
- 2.Stages
- 3.Process & Attitude



Growth vs. Stagnation

LEARNING MODE AND PROTECTIVE MODE



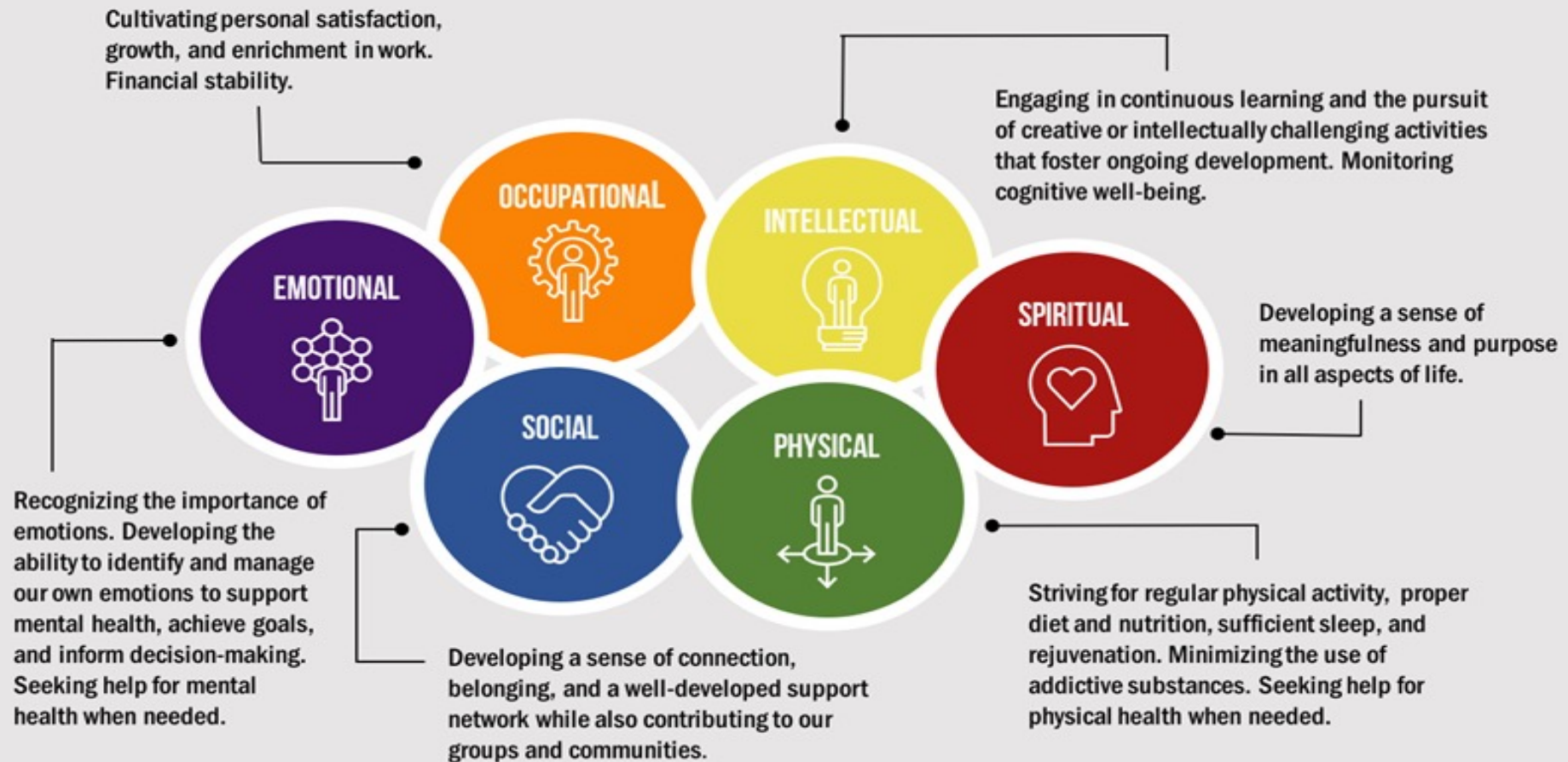
Is your focus on growth and adventure or simply on staying the same?

Do you think change; but fail to take the action steps to acquire it?

What do you want to change?



A continuous process in which lawyers strive for thriving in each dimension of their lives:



Pre-contemplation	Contemplation	Preparation	Action	Maintenance
<p>Consciousness raising – increasing information about yourself and the problem behaviour</p> <p>Dramatic relief – experiencing strong emotional reactions to events associated with the problem behaviour</p> <p>Environmental re-evaluation – becoming aware of the impact of your problem on others around you</p>	<p>Self re-evaluation – affective and cognitive re-experiencing of one's self and problems</p>	<p>Social liberation – noticing and using social conditions that support personal changes</p> <p>Self liberation – belief in your ability to change and commitment to act on that belief</p>	<p>Helping relationships – trusting others and accepting their support in changing</p> <p>Counter conditioning – replacing the behaviour with more positive behaviours and experiences</p> <p>Reinforcement management – rewards for staying quit of the problem behaviour</p>	<p>Stimulus control – avoiding or countering stimuli that elicit the problem behaviour</p>

Successful Transition (succession planning)

- 1. Taper off your work gradually;**
 - 2. Meet with a financial planner for realistic expectations about income, expenses, lifestyle and social security;**
 - 3. Build up your social network prior to retiring;**
 - 4. Develop your repertoire of ways to spend your time.**
- It is crucial to replace the social network and mental stimulation offered by the job. Better yet..
 - Have a network in place outside the sphere of work, along with joining the Senior Law Groups/
 - Committees,



FROM THE DIRECTOR OF 'THE BIG SHORT'



SUCCESSION

SERIES PREMIERE
6/3 10PM **HBO**

SSample Footer Text

5/4/23

TOP TEN LIST FOR THINGS NOT TO DO:

- 10. Don't rush**
- 9. Don't fret**
- 8. Don't go back into the workplace if you are not totally prepared for the changes you will find**
- 7. Don't try to impress people with how important you were in your past life.**
- 6. Don't overlook The Home Front**
- 5. Don't procrastinate – Just Do It!**
- 4. Don't hold resentments – rather – let it go!**
- 3. Don't be afraid**
- 2. Don't overlook a journey inward**
- 1. Refuse to act your age; but plan accordingly!**





Things to remember:

Attitude is Everything

**Accentuate the Positive in a negative world –
work positive and redefine your reality**

Adversity can teach

Keep goals

Be Bold

Be Sharp

Be Generous

Be Silly – LAUGH

Be Amazing

**Let It Go! Keep a spiritual component in your
life**

Eat healthy

Move a muscle; change a mood

**Remember, you control the door to your
thinking: Victim or Victor: It's Up To You!**

[illegible]

Alone at the Front

Mary Ellen Murrah

*Strategist and Operations Consultant,
Vista Consulting Team*



MARY ELLEN MURRAH is an Operations Consultant with Vista Consulting Team. Prior to joining Vista, Mary Ellen spent more than 16 years managing and marketing a national, legal case management software company. That position introduced her to thousands of personal injury law firms across the country. Putting that vast industry insight to good use, she's passionate about helping law firms improve their operations, cultivate an intentional culture, and make their vision and mission a reality.



SPEAKER

Mary Ellen is a familiar face at annual legal events and a frequent voice on topics ranging from legal marketing to data integrity. Whether speaking at conferences, legal events, webinars, or Vista's annual schools, Mary Ellen aims to engage and empower the audience with an entertaining and impactful presence.



LEGAL OPERATIONS EXPERT

Mary Ellen is skilled in identifying law firm business improvement opportunities and brings her extensive operations, team management, and industry knowledge to the Vista team. She has a true prowess for tackling projects with common sense management. Her eye for detail, human resources experience, and deep operations skills are an asset to help law firms grow their businesses and help attorneys foster and maintain efficient, profitable practices.



LEADERSHIP AND HR AUTHORITY

As a SHRM Senior Certified Professional, Mary Ellen has a keen interest in human resources and leadership development. She works with plaintiff law firms to help ensure they have a solid foundation in place that serves to further their ultimate goals and objectives. Her greatest satisfaction comes from helping firms develop great leaders and achieve a culture of trust and accountability.

PRESENTATION TOPICS

- Managing High Performing Remote Teams
- Hiring for Culture
- Unifying Fractured Teams
- Mission and Vision Development
- Diversity and Inclusion Efforts within a PI Law Firm
- Successful Interview Techniques
- Impactful 1:1 Meetings
- How to Step into a New Leadership Role and Earn Respect the Right Way
- Psychological Issues in the Workplace
- Case Management Software Considerations
- Data Integrity and Reporting
- Internal Marketing



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THE BUSINESS RESOURCE
FOR PLAINTIFF LAW FIRMS



Alone at
the Front:
How your firm
can grow
sustainably and
intelligently

MARY ELLEN MURRAH
VISTA CONSULTING

WHAT PREVENTS GROWTH?

The Practice of
Law

The Business of
Law

MENU OF **SERVICES**



COMPREHENSIVE CONSULTING

ASSESSMENT AND IMPLEMENTATION OF BEST PRACTICES IN THESE AREAS:

VISION/DIRECTION • INFRASTRUCTURE/CULTURE
INTAKE/REFERRALS • CASE MANAGEMENT • KPI REPORTS
HR/TRAINING • CLIENT RELATIONS • ACCOUNTING
BUILDING/FACILITIES • TECHNOLOGY



**ONLINE
TRAINING &
DEVELOPMENT**



**INDUSTRY
LEADING
EVENTS**



**LEADERSHIP
AND CULTURE
DEVELOPMENT**



**TALENT
ACQUISITION**



**FRACTIONAL
CFO**



**SUCCESSION
PLANNING**



**MERGERS &
ACQUISITIONS**



**INTAKE
AUDITING AND
COACHING**



**STRATEGIC
PLANNING**

FOUR WAYS TO GROW A LAW FIRM

1

- Obtain more clients

2

- Increase the value of each resolution

3

- Get clients to revisit or refer

4

- Increase process efficiency and effectiveness



SCALABLE SYSTEMS & PROCESSES

STANDARD OPERATING PROCEDURE HOW TOs:

- Involve your team in this process.
- Document it!
- Make SOPs available to all team members and ensure everyone knows how to find them.

STANDARD OPERATING PROCEDURES

- ▶ Enforce them!
- ▶ Revisit them!



COLLECTING GOOD, RELIABLE DATA



ADEQUATE CASE
MANAGEMENT SYSTEM



TICK MARKS &
SPREADSHEETS



DASHBOARDS & KPI
REPORTS

How many people
feel very confident
they get consistently
reliable data about
cases and
finances?

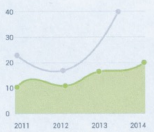


Morris Charts

Line Chart



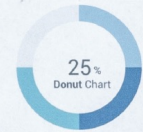
Area Chart



Bar Chart

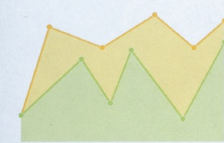


Donut Chart



Sparkline Charts

Line Chart



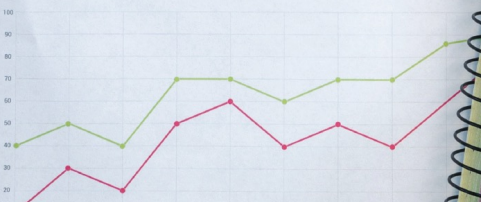
Bar Chart



Pie Chart



Easy Pie Charts



THE TRAPS OF **BAD DATA**

Without Reliable Data, You Can't...

- ▶ Make sound business decisions
- ▶ Effectively analyze and set marketing spends, firm budgets, and productivity
- ▶ Identify personnel or process bottlenecks
- ▶ Produce accurate data that provides you the ability to take both a 30,000-foot view and dive deep to assess the health of your firm

CAUTION: BAD DATA



**BAD DATA QUALITY
MAY RESULT IN
FRUSTRATION AND
LEAD TO DROP
KICKING YOUR
COMPUTER**

KPIs allow
objective
evaluation
and analysis
to aid in
coaching
and
training!

- Owner/Manager Scoreboards
- Management Diagnostics
- Coaching Tool (Not Hammer)
- Communicate & Hold Accountable
- TTE (Tools, Training, Expectations)

Operational KPIs

Scoreboard Report

From: 12/1/2022

Intake Summary

1/12/2023 11:01:55 AM

To: 12/31/2022

SPECS: Leads - All entries where the intake date falls within the date range

Wanted - Intake Date within date range and Does This Case Meet Our Sign Up Criteria = Yes

Signed - Intake date within date range; Signed = Yes

Wanted % - Wanted / (Leads - No Decisions)

Conv % - Signed / Wanted

No Decisions - Intake date within date range; Does This Case Meet Our Sign Up Criteria is NULL; Rejected and Signed are null

No Contact - Intake date within date range; Does This Case Meet Our Sign Up Criteria = No Contact

Chasing - Intake date within date range; Does This Case Meet Our Sign Up Criteria = Yes; Rejected and Signed are null

True Signups - Date Signed within date range

Rejected - Intake Date within date range; Rejected = "Yes

Ref Out - Intake Date within date range; Does This Case Meet Our Sing Up Criteria = Referred Out

Case Type	Total Leads	Wanted	Signed Up	Wanted Rate	Conv. Rate	No Decisions	No Contact	Chasing	True Signups	Rejected	Ref Out
AA	119	48	44	40.3%	91.7%	0	17	2	43	37	17
DOG	2	1	0	50.0%	0.0%	0	0	1	1	0	1
EL	44	0	0	0.0%	0.0%	0	3	0	0	11	32
MED	22	0	0	0.0%	0.0%	0	1	0	0	14	8
MT	12	5	5	41.7%	100.0%	0	0	0	5	3	3
NH	6	0	0	0.0%	0.0%	0	1	0	0	4	2
ONI	70	0	0	0.0%	0.0%	0	11	0	0	56	4
OTH	6	1	1	16.7%	100.0%	0	1	0	1	3	2
PL	26	4	4	15.4%	100.0%	0	2	0	4	9	12
SS	36	4	3	11.8%	75.0%	2	10	1	3	19	0
WC	52	3	3	6.0%	100.0%	2	3	0	3	43	0
Totals	395	66	60	16.9%	90.9%	4	49	4	60	199	81

Scoreboard Report

Friday, February 24, 2023


Paralegal Dashboard Stats

Specs: All Case Types; Client Contact is all CC combined (Treating, Non-Treating, WC, SS and EL); Excludes cases where Zulett, Vandana or Cristina G are listed in the Paralegal position

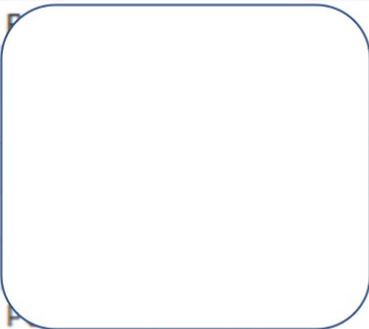
<u>Paralegal</u>	<u>Active</u>	<u>Need Client Contact ALL</u>	<u>Need Client Contact %</u>	<u># of Recs/Bills Outstanding</u>	<u>Demands to Attorney</u>	<u>Demands Sent</u>	<u>Demands Sent YTD</u>	<u>Settled</u>	<u>Settled YTD</u>
	71	5	92.96%	25	1	1	1	0	4
	51	0	100.00%	63	0	0	11	1	4
	71	5	91.38%	51	3	4	7	1	12
	64	3	95.24%	11	0	0	1	0	8
	69	40	42.03%	13	1	0	4	0	16
	73	35	48.53%	48	0	0	2	0	1
	68	6	91.04%	17	0	1	2	1	2

Diagnostic Report

Value Drivers

Matter # ▾	Client ▾	MRI ▾	Physical Therapy ▾	Case Category ▾	TOD (in Months) ▾
17627		Yes	Yes	B	0.9
17453		Yes		A+	2.5
17312		Yes		A	4.1
17252		Yes	Yes	B	4.5
17204		Yes		C	5.0
17021		Yes	Yes	A+	6.7

Statute of Limitations - Expires Within 90 Days

Matter # ▾	Client ▾	SOL Date ▾	Filed Suit Date
16776		5/23/2023	
16762		5/23/2023	
17091		5/23/2023	
16775		5/24/2023	
16764		5/25/2023	
16861		5/25/2023	
16860		5/25/2023	

Diagnostic Report

Demand Sent - Not Settled

Case #	Client	Case Type	CM/Para	Class	Date Opened	DOI	MMI	Demand Sent	Days Since Demand	Case Rank
200722		MVC		NEG	5/12/2022	5/12/2022	9/24/2022	1/23/2023	35	\$30,000 - \$100,000
200669		MVC		NEG	1/10/2022	12/16/2021	5/1/2022	1/25/2023	33	\$30,000 - \$100,000
200788		MVC		NEG	9/19/2022	8/3/2022	9/19/2022	1/27/2023	31	\$30,000 - \$100,000
200810		MVC		NEG	10/27/2022	10/25/2022	2/3/2023	2/3/2023	24	\$30,000 - \$100,000
200785		MVC		NEG	9/12/2022	9/7/2022	11/11/2022	2/7/2023	20	\$30,000 - \$100,000

Cases Settled - Date Range

Case #	Client	CM/PL	Case Type	Class	Date Opened	Settled Date	Insurer	Policy Type	Settled Total
200516			MVC	SETFIN	4/23/2021	2/7/2023	State Farm	First Party	\$30,000.00
200521			MVC	SETPAR	5/24/2021	2/7/2023	State Farm	First Party	\$30,000.00
200564			MVC	LIT	9/14/2021	2/9/2023	USAA Insurance	Third Party (Liability)	\$30,000.00
200409			MVC	SETFIN	7/13/2020	2/10/2023	State Farm	First Party	\$30,000.00
200738			MVC	NEG	6/29/2022	2/14/2023	Repwest	Third Party (Liability)	\$30,000.00
200831			MVC	SETFIN	11/30/2022	2/21/2023	State Farm	First Party	\$30,000.00
200813			MVC	NEG	10/31/2022	2/22/2023	Progressive County Mutual Insurance Company	Third Party (Liability)	\$30,055.00
200754			MVC	NEG	7/13/2022	2/24/2023	Alinsco Insurance Company	Third Party (Liability)	\$30,000.00
Total									\$240,055.00

Monthly Attorney KPI Review

Attorney

2023 Key Performance Indicators

Name John Smith

KPI's	January	February	March
File Review Percentage 90%	91.2%	87.2%	7762%
Cases Settled per Month (Goal 30)	22	35	29
All Fees Deposited (Annual Goal \$2,656,000)	\$435,293.66	\$351,704.54	\$446,654.00
Average Pre-Litigation Fee (Goal \$9,000)	\$8,640.43	\$9,625.05	\$8,625.00
Closed Average TOD with Fee (Goal ≤ 14 mths)	16.6	15.8	17.2
Closed With Fee % (Goal ≥ 75%)	74.2%	71.9%	81.9%
Closed Average TOD without Fee (Goal ≤ 6 mths)	5.5	7.1	6.1



TOOLS, TRAINING & EXPECTATIONS

AUTOMATION

- ▶ Think through tech advancements before pulling the trigger
 - ▶ Text messages
 - ▶ AI
 - ▶ Supplement, don't replace





REGULARLY MEASURE SUCCESS

Dashboards, reports, and KPIs are great, but...

- ▶ Who is looking?
- ▶ Is the data actionable?
- ▶ Can you identify bottlenecks?
- ▶ Do you celebrate success?

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Getting to the Finish Line

Bernard G. Conaway, Esquire
Conaway-Legal LLC

Yvonne Takvorian Saville, Esquire
Weiss, Saville & Houser, P.A.

Yvonne Takvorian Saville

Ms. Saville is a director with the law firm of Weiss, Saville & Houser, P.A. where her practice is focused on civil litigation and alternative dispute resolution. She has mediated and arbitrated over 14,000 cases to date. Ms. Saville has also served as a Special Master for complex civil cases in Delaware's District Court for eight years and has been an adjunct professor at the Delaware Law School since 2014. In recognition of her ADR practice, Ms. Saville was named a "Friend of the Court" by President Judge Jurden and was accepted as a Fellow with the American College of Civil Trial Mediators and as a member of the National Academy of Distinguished Neutrals. She has presented over 90 lectures on the topics of Alternative Dispute Resolution, Personal Injury and Workers' Compensation.

Ms. Saville is a Past President of the Delaware State Bar Association (DSBA) and is a member and previous Chair of DSBA's Workers' Compensation Section. She is also a member of the Randy J. Holland Inn of Court and serves on the CLE planning commissions for the DSBA Workers' Compensation section and Delaware Trial Lawyers Association. She co-chaired the Women and Law Section annual conference for 10 years and is a past co-Chair of the DSBA Nominating Committee.

Ms. Saville has been appointed to the Judicial Nominating Commission by Governor Carney and also currently serves on the Delaware Law School Alumni Board. She is a previous co-chair of the Delaware Supreme Court's Access to Justice Commission and served as a member of the Judicial Strategies Committee. She was a board member for 14 years with the Combined Campaign for Justice and served as an officer with the Delaware Financial Literacy Institute.

For the last 26 years, Ms. Saville has been on the Board of Governors for the Delaware Trial Lawyers Association (DTLA) and has served as its' President twice. She is a member of the American Bar Association and the American Association for Justice.

Awards and Honors

- **"AV"** Martindale-Hubbell Peer Review Pre-Eminent Rating 5.0 out of 5 in the areas of Personal Injury, Alternative Dispute Resolution and Workers' Compensation , 2012-2023
- **Kimmel-Thynge Award**, presented by the Alternative Dispute Resolution Section of the Delaware Bar in recognition for outstanding contributions to ADR in Delaware, 2021
- **Amicus Curiae Award** or "Friend of the Court", presented by President Judge Jurden on behalf of the Delaware Superior Court in recognition of ADR practice, 2019
- **Honorable Aida Wasserstein Award**, presented by the Women and Law Section of the Delaware Bar in recognition of professional excellence and significant contributions to the legal community, 2019
- **Women's Leadership Award**, presented by the Delaware State Bar Association in recognition of achievement and activities in matters affecting woman and who has served as an inspiration to and a model for women lawyers in our profession, 2018

- **Alumna of the Year Award**, presented by Delaware Law School in recognition of contribution to community and profession, 2016
- **Eagle of Justice Award**, presented by the Delaware Trial Lawyers Association for dedication to preserving the rights of Delawareans, 2016
- Named *The Best Lawyers in America*® Mediation “**Lawyer of the Year**” in Wilmington in 2015, 2018, 2020 and 2022
- Recognized in *The Best Lawyers in America*® 2015 - 2023 in the field of Mediation
- Recognized by *Delaware Today Magazine* as the **Top Alternative Dispute Resolution Lawyer**, 2013 - 2022; one of the **Top Worker’s Compensation Lawyers**, 2010
- Recognized as a *Delaware Super Lawyer*® for Alternative Dispute Resolution, 2013-2023
- Named as **Delaware Top 10 Super Lawyer**®, 2016 - 2018, 2023
- **DSBA President’s Gavel and Ring** for service as the 67th President of the Delaware State Bar Association, 2014-2015
- **DTLA President’s Award for Outstanding Leadership** on behalf of the Delaware Trial Lawyers Association, 2006-2007
- **Outstanding Service Award**, presented by Delaware Law School in recognition of “dedication and service to the legal community,” 2006
- **Five-Year Volunteer Service Award**, presented by the Office of the Child Advocate in recognition of “pro bono work on behalf of children”, 2006
- **Key Contact of the Year Award**, presented by the Delaware Trial Lawyers’ Association in recognition of “outstanding service in support of Delaware’s civil justice system,” 2003

Law Firm recognition:

- Weiss, Saville & Houser, P.A. named by U.S. News and World Reports as Top Tier 1 **Best Law Firms in Workers Compensation Law and Mediation**, 2011-2023