



SCHEDULE

9:00 -9:05 AM	OPENING REMARKS AND INTRODUCTION
9:05-9:45 AM	IDENTIFYING TALENT, ONBOARDING & RETENTION
9:45-10:35 AM	SUPPORT AS A STRATEGY: HOW TO BUILD A STRONGER PRACTICE THROUGH DELEGATION
10:35-10:50 AM	BREAK
10:50-11:50 AM	RUNNING A CASE
11:50-1:05 PM	MENTAL HEALTH AND WELLNESS-RELAX RECHARGE RECOMMIT (1 CLE)
1:05-1:35 PM	LUNCH BREAK
1:35-2:05 PM	BUSINESS OF THE PRACTICE OF LAW
2:05-2:55 PM	ETHICS & PROFESSIONALISM – DEALING WITH DIFFICULT CLIENTS, DIFFICULT OPPOSING COUNSEL, AND BAR COMPLAINTS (ETHICS-1 CLE)
2:55-3:10 PM	BREAK
3:10-4:00 PM	ATTORNEY’S FEES
4:00-5:00 PM	AI IN LEGAL PRACTICE (TECHNOLOGY-1 CLE)

1. OPENING REMARKS AND INTRODUCTION

2. PRACTICE MANAGEMENT- IDENTIFYING TALENT, ONBOARDING & RETENTION

a. RECOGNIZING A NEED

- I. HOW MUCH WORK IS TOO MUCH FOR ONE PERSON?
 1. NUMBER OF CASES
 2. NEEDS OF LAWYERS AND SUPPORT STAFF
 3. TIME FOR BUSINESS DEVELOPMENT
- II. CAN WE AFFORD TO DO THIS/CAN WE AFFORD NOT TO DO THIS?
- III. VISITING OR REVISITING FIRM CULTURE PRIOR TO STARTING THE PROCESS

b. CREATING THE JOB DESCRIPTION

- I. WHAT TO INCLUDE
- II. INPUT FROM COLLEAGUES AND STAFF

c. DECIDING ON SALARY

- I. MARKET STUDIES THROUGH ABA AND OTHER SECTORS
- II. PREVAILING WAGES
- III. BONUSES
- IV. OTHER INCENTIVES

d. ADVERTISING THE POSITION

- I. WARM REFERRALS
- II. ONLINE PORTALS
- III. RECRUITERS

e. INTERVIEW PROCESS

- I. EMPLOYMENT APPLICATION
- II. INITIAL INTERVIEW
- III. WRITING SAMPLES. OTHER TASKS OR PROJECTS PRE-HIRE
- IV. FOLLOW UP INTERVIEWS
- V. BACKGROUND CHECKS

f. MAKING THE OFFER

- I. ART OF NEGOTIATION
- II. BEING FLEXIBLE
- III. FORMAL OFFER LETTERS/CONTRACTS

g. ONBOARDING

- I. IN PERSON OR VIRTUAL
- II. ASSIGNING MENTORS
- III. 90 DAY PROBATIONARY PERIOD

h. ANNUAL REVIEWS

- I. SELF EVALUATION
- II. TEAM EVALUATION
- III. PARTNER EVALUATION
- IV. REVIEW PROCESS
- V. HOW TO DETERMINE RAISES AND BONUSES

i. DEVELOPING A PARTNER TRACK

- I. TIMING
- II. NON-EQUITY AND EQUITY PARTNERS
- III. EXIT STRATEGY FOR SOLOS

j. WHEN THE PERFECT FIT DOES NOT FIT

- I. RECOGNIZE THE ISSUES AND TRY TO RESOLVE
- II. TERMINATION
- III. ENDING A PARTNERSHIP

3. PRACTICE MANAGEMENT – SUPPORT AS A STRATEGY: HOW TO BUILD STRONGER PRACTICES THROUGH SMART DELEGATION

a. INTRODUCTION TO THE CONCEPT OF THE “INVISIBLE LOAD”

- I. DEFINING THE DUAL PROFESSIONAL AND PERSONAL DEMANDS PLACED ON WOMEN ATTORNEYS
- II. THE IMPACT OF COMPETING RESPONSIBILITIES ON PERFORMANCE AND WELL-BEING
- III. RECOGNIZING BURNOUT AND COGNITIVE OVERLOAD IN LEGAL PRACTICE

b. THE BUSINESS CASE FOR MARKETING IN LEGAL PRACTICE

- I. MARKETING AS A DRIVER OF VISIBILITY AND CREDIBILITY
- II. RELATIONSHIP BETWEEN MARKETING AND CLIENT QUALITY
- III. MARKETING’S ROLE IN GENERATING PREDICTABLE REVENUE
- IV. MARKETING AS A TOOL FOR AUTONOMY AND CAREER CONTROL
- V. MARKETING’S CONTRIBUTION TO TIME FREEDOM AND LONG-TERM STABILITY

c. UNDERSTANDING THE DEMANDS OF EFFECTIVE MARKETING

- I. CORE COMPONENTS: STRATEGY, CONSISTENCY, CREATIVITY, AND TECHNICAL EXPERTISE
- II. EVOLVING REQUIREMENTS, INCLUDING TECHNOLOGY, ANALYTICS, AND COMPLIANCE
- III. LIMITATIONS OF ATTEMPTING TO MANAGE MARKETING INDEPENDENTLY

d. COMMON INEFFECTIVE APPROACHES TO MARKETING IN SMALL FIRMS

- I. OVER-RELIANCE ON ADMINISTRATIVE STAFF WITHOUT MARKETING EXPERTISE
- II. DO-IT-YOURSELF (DIY) MARKETING APPROACHES
- III. RISKS OF ASSIGNING MULTIPLE SPECIALIZED ROLES TO A SINGLE INDIVIDUAL

e. COGNITIVE LOAD AND PRODUCTIVITY CHALLENGES

- I. RESEARCH ON COGNITIVE LOAD AND ROLE CONFLICT AMONG WOMEN PROFESSIONALS
- II. IMPACT OF TASK SWITCHING ON PRODUCTIVITY AND EFFICIENCY
- III. CONSEQUENCES FOR LEGAL WORK QUALITY AND BUSINESS DEVELOPMENT

f. DELEGATION AS A STRATEGIC LEADERSHIP SKILL

- I. THE ROLE OF DELEGATION IN EFFECTIVE LAW FIRM LEADERSHIP
- II. PROTECTING HIGH-VALUE ATTORNEY TIME
- III. SHIFTING FROM TASK OWNERSHIP TO STRATEGIC OVERSIGHT

g. OUTSOURCING AS A PRACTICE MANAGEMENT STRATEGY

- I. COST COMPARISON: OUTSOURCING VS. BUILDING AN INTERNAL MARKETING TEAM
- II. TIME SAVINGS AND INCREASED CAPACITY FOR LEGAL WORK
- III. ACCESS TO SPECIALIZED EXPERTISE ACROSS DISCIPLINES
- IV. OPERATIONAL ADVANTAGES, INCLUDING REDUCED HR AND PERSONNEL CHALLENGES
- V. SCALABILITY, PREDICTABILITY, AND STRATEGIC ALIGNMENT

h. CHARACTERISTICS OF SUCCESSFUL WOMEN ATTORNEYS AND FIRMS

- I. RECOGNIZING PERSONAL AND PROFESSIONAL LIMITS
- II. PROTECTING TIME, ENERGY, AND FOCUS
- III. BUILDING INTENTIONAL SUPPORT SYSTEMS
- IV. DELEGATING STRATEGICALLY TO SUPPORT GROWTH

i. IDENTIFYING WHEN TO SEEK EXTERNAL SUPPORT

- I. INDICATORS OF INCONSISTENT OR INEFFECTIVE MARKETING EFFORTS
- II. SIGNS OF OPERATIONAL STRAIN AND ADMINISTRATIVE OVERLOAD
- III. RECOGNIZING GAPS IN REPORTING, TECHNOLOGY, AND EXECUTION
- IV. EVALUATING THE IMPACT OF OVEREXTENSION ON CLIENT SERVICE

j. SELECTING THE RIGHT MARKETING AND OPERATIONAL PARTNER

- I. IMPORTANCE OF LEGAL INDUSTRY KNOWLEDGE AND COMPLIANCE AWARENESS
- II. EVALUATING REPORTING, TRANSPARENCY, AND ACCOUNTABILITY
- III. ASSESSING TEAM STRUCTURE AND AVAILABLE EXPERTISE
- IV. ALIGNMENT OF VALUES AND LONG-TERM STRATEGIC GOALS

k. CONCLUSION: REFRAMING SUPPORT AS A STRATEGIC ADVANTAGE

- I. DELEGATION AS A TOOL FOR SUSTAINABILITY AND GROWTH
- II. THE ROLE OF SUPPORT SYSTEMS IN BUILDING SCALABLE LEGAL PRACTICES
- III. EMPOWERING ATTORNEYS TO FOCUS ON PRACTICING LAW WHILE DRIVING BUSINESS SUCCESS

4. RUNNING A CASE

- a. **DISCOVERY**
- b. **MANDATORY DISCLOSURE**
- c. **INTERROGATORIES**
- d. **REQUEST FOR PRODUCTION**
- e. **REQUEST FOR ADMISSIONS**
- f. **DEPOSITIONS**
- g. **SUBPOENAS**
- h. **CONSULTING WITH ALLIED PROFESSIONALS**
 - i. ACCOUNTANTS/BUSINESS VALUATION ANALYSTS
 - ii. APPRAISERS
 - iii. HEALTH INSURANCE CONSULTANTS
 - iv. REALTORS
 - v. CHILD SPECIALISTS
 - vi. QDRO SPECIALISTS
- i. **SETTLEMENT**
- j. **PREPARATION**
- k. **DIRECT NEGOTIATIONS**
- l. **MEDIATION**
- m. **POST-MEDIATION NEGOTIATIONS**

5. MENTAL HEALTH AND WELLNESS--RELAX, RECHARGE & RECOMMIT

This interactive, neuroscience-informed workshop is designed to help high-performing professionals understand burnout through a brain health lens and learn practical strategies to reduce overwhelm, restore energy, and reconnect with purpose. Participants will leave with tools they can immediately apply to manage stress, improve mental clarity, and operate from a more grounded, intentional state.

a. **Welcome & Reset (5 minutes)**

- I. Framing the session: shifting from survival mode to intentional living
- II. Setting tone: permission to pause, reflect, and reset

b. **The Brain on Overload: Understanding Burnout (10 minutes)**

- I. Burnout as neuro-fatigue, not weakness
- II. "Too Many Tabs Open" metaphor
- III. How chronic stress impacts thinking, emotions, and performance

c. **Recognizing Burnout Patterns (10 minutes)**

- I. Signs and symptoms:
 - 1. Cognitive (fog, indecision, overthinking)
 - 2. Emotional (irritability, numbness, overwhelm)
 - 3. Physical (fatigue, tension)
 - 4. Behavioral (avoidance, overworking)
- II. Guided reflection exercise

d. Experiential Exercise: “Mental Backpack” (10 minutes)

- I. Identifying invisible burdens participants are carrying
- II. Letting go vs continuing to carry
- III. Connecting awareness to emotional load

e. Thought Patterns & Mental Habits (10 minutes)

- I. Introduction to ANTs (Automatic Negative Thoughts) How thoughts
- II. drive feelings and behaviors
- III. Common cognitive distortions in high achievers

f. Experiential Exercise: “Driver vs Passenger” (10 minutes)

- I. Distinguishing reactive vs intentional thinking Reclaiming control
- II. over responses and decisions

g. Practical Tools for Regulation & Reset (10 minutes)

- I. Quick nervous system reset techniques (breathing, grounding)
- II. Cognitive reframing strategies
- III. Creating mental space and focus

h. Reconnection & Recommitment (5 minutes)

- I. Aligning actions with values and priorities Small, realistic shifts for
- II. sustainable change

i. Takeaways & Q&A (5 minutes)

- I. Participants will leave with:
 1. A clearer understanding of their burnout patterns
 2. Tools to regulate stress in real time
 3. Strategies to shift unhelpful thinking
 4. A personalized starting point for change

6. BUSINESS OF THE PRACTICE OF LAW

a. INTRODUCTION TO STRATEGIC PLANNING

b. MISSION STATEMENT, VISION STATEMENT, CORE VALUES

c. ACTION PLAN

d. SWOT ANALYSIS

e. GOALS AND OBJECTIVES

f. CONSTRAINTS TO GOALS

g. REMOVING CONSTRAINTS

h. ACCOUNTABILITY

i. UNDERSTANDING TIME AND TASK MANAGEMENT

- I. DEFINITION AND COMPONENTS OF TIME MANAGEMENT
- II. KEY PRINCIPLES OF EFFECTIVE TASK MANAGEMENT
- III. LINK BETWEEN EFFECTIVE TIME MANAGEMENT AND IMPROVED PRODUCTIVITY

j. PRIORITIZING TASKS AND SETTING REALISTIC DEADLINES

- I. ASSESSING TASK URGENCY AND IMPORTANCE APPLYING
- II. THE EISENHOWER MATRIX FOR TASK PRIORITIZATION
- III. TECHNIQUES FOR SETTING ACHIEVABLE DEADLINES

k. DASHBOARDING & USING FINANCIAL STATEMENTS

- I. IMPORTANCE OF ACCOUNTABILITY USING
- II. YOUR METRICS
- III. CREATING A BUDGET
- IV. REVIEWING FINANCIAL STATEMENTS
- V. REVIEWING WEEKLY CASH FLOW

7. ETHICS & PROFESSIONALISM – DEALING WITH DIFFICULT CLIENTS, DIFFICULT OPPOSING COUNSEL, AND BAR COMPLAINTS

a. DEALING WITH CLIENTS

b. DEALING WITH PRO SE LITIGANTS

c. WORKING WITH OPPOSING COUNSEL

d. JUDICIAL DECORUM

e. BAR COMPLAINTS

8. ATTORNEY'S FEES

a. RETAINERS

- I. Written Fee Agreements
- II. Special Clauses
- III. Credit Card Charges
- IV. Evergreen Retainers
- V. Non-refundable Retainers
- VI. Flat or Fixed Fee Retainers
- VII. Trial Retainers

b. BILLING AND INVOICING

- I. Frequency
- II. Contemporaneous time entries
- III. Detail vs. Redaction

c. LITIGATING FEE ISSUES

- I. Discoverability and Admissibility
- II. Burden of Proof
- III. Standard to be applied Attorney's
- IV. Fees Affidavit Objections to time
- V. entries

d. CHARGING LIENS

- I. When are they/are they not available

- II. What assets/payments can/cannot be executed upon
- III. Fees on fees
- IV. Process – motion, notice, order and recording
- V. Expert Witness – when needed or not

e. FEE BASIS

- I. §61.16
 1. Actual or relative need
 2. Available income
 3. At what point in time determination made
 4. Reasonableness
 5. Necessity
- II. §57.105
- III. Rosen fees
- IV. Inequitable conduct *Henry v. Henry*, 191 So.3d 995 (Fla 4th DCA 2016)
- V. To Compel Discovery
- VI. Contempt Fees
- VII. §61.13(4)(C)(2) Failure to Honor Time-Sharing Schedule
- VIII. §61.13001(3)(e)(4) Relocation in violation of the statute
- IX. Contractual basis
 1. Prevailing Party Fees
 2. Unliteral Fee Provisions

f. APPELLATE FEES-10 MINUTES

- I. In which court to file
- II. When to file

9. AI IN LEGAL PRACTICE

a. INTRODUCTION TO AI IN LEGAL PRACTICE

- I. OVERVIEW OF AI APPLICATIONS IN THE LEGAL FIELD.
- II. IMPORTANCE OF STAYING AT THE FOREFRONT OF LEGAL TECHNOLOGY.

b. AI APPLICATIONS IN FAMILY LAW

- I. INFLUENCE OF AI ON FAMILY LAW.
- II. APPLICATIONS INCLUDE AUTOMATED DOCUMENT ANALYSIS, PREDICTIVE ANALYTICS, AI-DRIVEN MEDIATION, MACHINE LEARNING FOR FINANCIAL ANALYSIS, AND CUSTODY DECISION ALGORITHMS.

c. BENEFITS OF AI FOR SOLO PRACTITIONERS AND SMALL FIRMS

- I. INCREASED EFFICIENCY THROUGH AUTOMATION OF ROUTINE TASKS.

- II. COST REDUCTION BY MINIMIZING THE NEED FOR ADDITIONAL STAFF.
- III. IMPROVED ACCURACY IN LEGAL WORK.
- IV. ENHANCED CLIENT SERVICES AND SATISFACTION.
- V. ACCESS TO BIG DATA AND COMPETITIVE ADVANTAGE.

d. CASE STUDY: AI SUCCESS STORIES IN FAMILY LAW

- I. EXAMPLES OF AI INTEGRATION IN CASE MANAGEMENT AND LEGAL RESEARCH.
- II. USE OF CHATBOTS, VIRTUAL ASSISTANTS, AND MACHINE LEARNING FOR DATA ANALYSIS.

e. TOOLS AND TECHNOLOGIES

- I. EXPLORATION OF CASE MANAGEMENT SOFTWARE, LEGAL RESEARCH PLATFORMS, DOCUMENT DRAFTING TOOLS, AND AI IN MARKETING AND DISCOVERY.
REVIEW OF SPECIFIC APPS/SOFTWARE LIKE ADOBE, SMOKEBALL,
- II. CO-PILOT, CHAT GPT, AND OTHERS.

f. IMPLEMENTING AI IN YOUR PRACTICE

- I. STRATEGIES FOR EFFECTIVE AI IMPLEMENTATION IN FLORIDA FAMILY LAW.
- II. ASSESSMENT OF CURRENT TECH INFRASTRUCTURE AND TRAINING.
CLIENT COMMUNICATION, COMPLIANCE, AND CONTINUOUS
- III. EVALUATION.

g. ETHICAL CONSIDERATIONS AND COMPLIANCE

- I. IMPORTANCE OF ADHERING TO ETHICAL STANDARDS AND CONFIDENTIALITY.
- II. IMPACT OF AI ON BILLING PRACTICES.

h. THE IMPORTANCE OF PROMPTS

SAMPLE PROMPTS FOR ANALYSIS IN DIVORCE CASES.