

# PROGRAM AGENDA

October 7-9, 2020 | 3-Part Virtual Meeting

## WEDNESDAY, OCTOBER 7, 2020

## GOTOWEBINAR SESSION

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| 10:00am – 10:20am PT | <b>PROGRAM INTRODUCTION</b>   Philip Kavesh  |
| 10:20am – 11:50am PT | <b>BUSINESS INFRASTRUCTURE</b>   Live Video Presentation by Philip Kavesh <ul style="list-style-type: none"> <li>– Developing the proper mindset and approach to your estate planning practice</li> <li>– Class exercises to determine what barriers are holding you back</li> <li>– How to create a blueprint for your practice, increase the value of your law practice and develop a sustainable exit strategy</li> <li>– How to properly build your team by finding, hiring, managing and training the right associate attorneys and support staff</li> </ul>  |
| 11:50am – 12:00pm PT | <b>BREAK</b>   |
| 12:00pm – 1:50pm PT  | <b>BUSINESS INFRASTRUCTURE</b>   Live Video Presentation by Philip Kavesh <ul style="list-style-type: none"> <li>– How to set up financial and performance goals and ensure that your firm hits these goals</li> <li>– Systems for improving productivity, reducing interruptions and increasing efficiency in the office</li> <li>– Compensation packages for associate attorneys and support staff that encourage productivity and teamwork</li> <li>– How your marketing plan directly impacts your business infrastructure and how to develop systems for properly managing and monitoring both for maximum results</li> <li>– Evaluating your fee structure and how to properly determine the right price to set for your services</li> <li>– Ways to structure and manage your calendar for maximum productivity</li> <li>– Developing accountability for you (the business owner) so that you can begin to move your practice to the next level!</li> </ul> |
| 1:50pm – 2:30pm PT   | <b>LIVE INTERACTIVE Q&amp;A SESSION</b>  |

## THURSDAY, OCTOBER 8, 2020

## GOTOWEBINAR SESSION

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| 10:00am – 10:15am PT | <b>DAY 2 OPENING REMARKS</b>   Philip Kavesh   |
| 10:15am – 11:30am PT | <b>MARKETING</b>   Live Video Presentation by Philip Kavesh <ul style="list-style-type: none"> <li>– Overview of common misperceptions of marketing and new ways to look at marketing your law practice</li> <li>– How to properly set up your marketing “budget” and make sure that you’re doing enough marketing</li> <li>– Why nice looking brochures and other marketing material mean <i>absolutely nothing</i> if they don’t meet the 7 Key Components to Effective Direct Response Marketing!</li> <li>– Marketing strategies for targeting your existing clients and how your existing clients represent a huge short and long-term revenue source that most attorneys are overlooking</li> <li>– Why most paid annual client maintenance plans fail! (and a better alternative!)</li> </ul> |

11:30am – 11:45am PT	<b>BREAK</b>
11:45am – 1:15pm PT	<b>MARKETING</b>   Video Presentation by Philip Kavesh <ul style="list-style-type: none"> <li>- Why public seminar marketing is still the most effective way to bring in new business (and not difficult to get started!)</li> <li>- How you can develop low and potentially no-cost seminar presentations to drive new business into your practice</li> <li>- Tested and proven strategies that will improve your results from seminars</li> <li>- “New” estate planning services and niches that can be added to your practice to maximize your marketing efforts</li> <li>- Effective use of your firm’s website, social media and blogs as a marketing strategy</li> <li>- How to generate more referrals from clients</li> <li>- Utilizing overlooked and “outside the box” marketing techniques</li> </ul>
1:15pm – 2:00pm PT	<b>UPDATED MARKETING STRATEGIES IN TODAY’S ENVIRONMENT</b>   Philip Kavesh
2:00pm – 2:30pm PT	<b>LIVE INTERACTIVE Q&amp;A SESSION</b>   Philip Kavesh

<b>FRIDAY, OCTOBER 9, 2020</b>	<b>ZOOM SESSION</b>
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10:00am – 10:10am PT	<b>DAY 3 OPENING REMARKS</b>   Philip Kavesh
10:10am – 11:00am PT	<b>PROGRAM IMPLEMENTATION &amp; CREATING ACTION PLAN</b>   Kristina Schneider
11:00am – 11:40am PT	<b>INDIVIDUAL CONSULTATIONS BEFORE GROUP</b>   Philip Kavesh & Kristina Schneider
11:40am – 12:00pm PT	<b>BREAK</b>
12:00pm – 1:50pm PT	<b>INDIVIDUAL CONSULTATIONS BEFORE GROUP</b>   Philip Kavesh & Kristina Schneider
1:50pm – 2:30pm PT	<b>Q&amp;A AND PROGRAM WRAP-UP</b>   Philip Kavesh