### JEP Dashboard

<table>
<thead>
<tr>
<th>Day 1:</th>
<th>Week 1</th>
<th>Week 2 – Month 6</th>
<th>Month 7 - Month 18 (or as they naturally fit into the schedule)</th>
<th>Specific Timing:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>JEP Introduction &amp; Overview (1st program)</td>
<td>Lexis Advance</td>
<td>Akina (Growthplay) Coaching Kickoff (3rd Quarter)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Legal Service Delivery Innovation</td>
<td>Process Mapping &amp; Project Management</td>
<td>Beyond the JEP: Leaving the nest (final program)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Unbundling Legal Services</td>
<td>Client Facing Technology &amp; Communication</td>
<td>Affordable Care Act/Risk Management for Your Practice (October)</td>
<td></td>
</tr>
<tr>
<td>Day 2:</td>
<td>JEP &amp; Beyond: Law Firm Startup Stories</td>
<td>Community Engagement &amp; Mentoring</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Building your Business Development Foundation</td>
<td>Social Media Marketing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any Day During Week 1:</td>
<td>JEP Admin &amp; Communication</td>
<td>JEP Referrals &amp; Participant Check-in Meetings</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Internet Presence for Attorneys</td>
<td>Budgeting</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Law Practice Management and Technology</td>
<td>Accounting</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Introduction to Pricing</td>
<td>Bio Writing Workshop</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>The Legal Service Delivery Landscape (legal aid, pro bono &amp; firms)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Daley Center Tour &amp; Judges Panel (1st or 2nd week)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>JEP Resources Review</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Business Planning &amp; Value Propositions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>The JEP Curriculum</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Privilege, Confidentiality &amp; Work Product</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CARPLS Training</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tax Issues &amp; Entity Structures</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* 1st Quarter:*
  - Lexis Advance
  - Process Mapping & Project Management
  - Client Facing Technology & Communication
  - Community Engagement & Mentoring
  - Social Media Marketing
  - JEP Referrals & Participant Check-in Meetings
  - Budgeting
  - Accounting
  - Bio Writing Workshop

* 2nd Quarter:*
  - Messaging & Media Training
  - Document Assembly & Business Continuity Planning
  - Referring Cases
  - Setting Pricing for your Legal Services & Marketing them on your Website
  - Client Screening, Setting Expectations, Parting Ways & Related Tech Tools
  - Engagement Agreement Workshop
  - Service Standards, Customer Service & Tech Audit
  - Internet Forms, Web Building, Chatbots, and other Tech Tools for Attorneys
  - Resilience/Wellness
  - JEP Firm Presentation Series

* Both Quarters:*
  - Subject matter expertise and skills needed to practice law*

---

* Training on this topic will be acquired through the participant’s participation in their pro bono placement and a CBF Legal Aid Academy or CBA CLE Department training.

*Alumni Trainings:* The JEP organizes additional trainings tailored to the needs of JEP Alumni. These trainings take place every other month. Happy hours are scheduled during the off months.
JEPC Training Digest

The Justice Entrepreneurs Project (JEP) offers the following training exclusively to participants and invited guests. Thanks to the generosity of JEP partners, participants in the incubator also have unlimited access to continuing legal education programs and substantive skill trainings offered by the Chicago Bar Association (CBA) and the Practising Law Institute. The curriculum below takes into account the other free training available to participants through these other channels, which includes an excellent series of law practice management and technology trainings and associated resources through the CBA. If you have questions regarding JEP training, please contact Director of Innovation & Training for the JEP Jessica Bednarz at jbednarz@chicagobar.org or (312) 554-8022.

Table of Contents

Badge 1: JEP Program Specifics ................................................................. 4
- JEP Introduction & Overview
- The Legal Service Delivery System (Legal Aid, Pro Bono & Firms)
- JEP Administration & Communication
- JEP Resources Review
- CARPLS Training
- The JEP Curriculum
- JEP Referrals & Participant Check-in Meetings
- Beyond the JEP: Leaving the Nest

Badge 2: The Delivery of Legal Services .................................................. 5
- There is No Box – Innovation in the Legal Service Delivery
- Unbundling Legal Services
- Introduction to Pricing
- Process Mapping & Project Management
- Setting Pricing for your Legal Services & Marketing them on your Website
- Client Screening, Setting Expectations, Parting Ways & Related Tech Tools
- Engagement Agreement Workshop

Badge 3: Marketing, Communications & Business Development .................. 7
- Building your Business Development Foundation
- Internet Presence for Attorneys
- Social Media Marketing
- JEP Firm Presentation Series (2-3 sessions)
- Presentation Training
- Bio Writing Workshop
- JEP Service Standards, Customer Service & Tech Audit
- Akina (GrowthPlay) Coaching Kickoff
- Community Engagement & Mentoring
- Messaging & Media Training
- Internet Forms, Web Building, Chatbots & Other Tech Tools for Attorneys

Badge 4: Risk Management ........................................................................ 10
- Risk Management
- Trust Accounting and the Rules of Professional Conduct
- Privilege, Confidentiality & Work Product
- Referring Cases
- Document Assembly & Succession Planning

**Badge 5: Entrepreneurship & Innovation** ................................................................. 11
- JEP Law Firm Startup Stories
- Entrepreneur Series – Legal
- Entrepreneur Series – Startups

**Badge 6: Law Firm Operations & Technology** ......................................................... 12
- Tax Issues & Entity Formation
- Business Planning & Value Propositions
- Law Practice Management & Technology
- Document Assembly & Business Continuity Planning
- JEP Firm Presentation Series (2-3 sessions)
- Legal Technology Vendor Series
- Budgeting
- Client Facing Technology & Communications
- Accounting
- Paralegal Use
- Retirement Planning
- Affordable Care Act & Other Types of Insurance

**Badge 7: The Practice of Law** ................................................................. 15
- Daley Center Tour & Judges Panel
- Lexis Advance
- Resilience/Wellness
Badge 1: JEP Program Specifics

Target Outcome: By the end of the program, the participant will understand the importance of the JEP and how it and the CBF fit into the legal service delivery ecosystem in Chicago and be familiar with the various resources available to them through the JEP, CBF, CBA, and legal community at large.

JEP Introduction & Overview dashboard
- **Speaker:** Bob Glaves, Executive Director @ The Chicago Bar Foundation
- **Key Learning Objectives:**
  - Understand the driving forces behind the JEP’s creation
  - Define the target client population
  - Understand the value of and reasoning behind using market based solutions
  - Gain context for the importance of innovation in the practice of law
- **Timing:** First up

The Legal Service Delivery Landscape (Legal Aid, Pro Bono & Firms) dashboard
- **Speaker:** Samira Nazem, Director of Pro Bono and Court Advocacy @ The Chicago Bar Foundation
- **Key Learning Objectives:**
  - Understand the high level legal needs of Chicago residents and how the CBF and the JEP fit into the legal service delivery ecosystem
  - Learn about other nonprofit legal aid organizations and their areas of focus
  - Gain insight into how the CBF interfaces with courts and elected officials
  - Hear about resources available through the CBF
- **Timing:** First Week

JEP Administration & Communication dashboard
- **Speaker:** Trevor Clarke, Director @ the Justice Entrepreneurs Project
- **Key Learning Objectives:**
  - Go through office use policies and etiquette
  - Tour facilities and relevant JEP surroundings
  - Discuss communication guidelines for current and past participants, as well as other supporters of the JEP
- **Timing:** First week

JEP Resources Review dashboard
- **Speakers:** JEP Alumni
- **Key Learning Objectives:** Identify physical and digital resources available at the JEP
- **Timing:** First week

CARPLS Training dashboard
- **Speaker:** Leslie Wallin or another staff member from CARPLS
- **Key Learning Objectives:**
  - Learn the ins and outs of CARPLS and its hotline, which is a national model
  - Learn the basics of family, landlord/tenant, and consumer law (online portion of training)
- **Timing:** First Week
The JEP Curriculum dashboard

- **Speaker:** Jessica Bednarz, Director of Innovation & Training @ the Justice Entrepreneurs Project
- **Key Learning Objectives:**
  - Provide JEP participants with an overview of what they will learn and when
  - Discuss how JEP uses PeopleVine for training management
  - Identify other training resources outside of the JEP
- **Timing:** End of first week

JEPI Referrals & Participant Check-in Meetings dashboard

- **Speaker:** Trevor Clarke, Director & Jessica Bednarz, Director of Innovation & Training @ the Justice Entrepreneurs Project
- **Key Learning Objectives:**
  - Check in with each JEP participant individually to see how their pro bono placements are going and whether they are meeting practice management requirements and milestones
  - Understand how referrals are made to the JEP and where they originate
  - Learn how to use the JEP LegalServer and CARPLS Salesforce databases to evaluate and accept referrals
  - Discuss the rules and etiquette involved in accepting referrals and reviewing brief case descriptions
  - Identify data that can be collected during the course of representation to provide feedback to the JEP program
- **Timing:** First quarter

Beyond JEP: Leaving the Nest dashboard

- **Speaker:** Trevor Clarke, Director @ the Justice Entrepreneurs Project
- **Key Learning Objectives:**
  - Discuss continuing obligations and benefits of remaining in the JEP network
  - Review JEP Alumni Agreement
- **Timing:** Last class

**Badge 2: The Delivery of Legal Services**

*Target Outcome:* By the end of the JEP program, the participant will know how to create, price, and customize legal service offerings for low and moderate income clients.

There is No Box – Innovation in Legal Service Delivery dashboard

- **Speaker:** Will Hornsby, Staff Counsel @ the American Bar Association
- **Key Learning Objectives:**
  - Understand the traditional way of practicing law and its shortcomings
  - Discuss the client (or consumer) engagement deficit and how to overcome it
  - Gain exposure to niche practices, unbundling, collaborative law, fee shifting practices, and nonprofit clinics
  - Consider examples of law being done differently
- **Timing:** Day one
Unbundling Legal Services dashboard
• **Speaker:** Pat Wrona, Legal Director @ CARPLS
• **Key Learning Objectives:**
  o Understand what unbundling and limited scope representation are
  o Learn how and when unbundling of services is possible
  o Understand the rules and ethical considerations of unbundling
  o Consider how limited scope can fit into your practice
  o Identify appropriate limited scope appearance forms
• **Timing:** Day one

Introduction to Pricing dashboard
• **Speakers:**
  o Bob Glaves, Executive Director @ The Chicago Bar Foundation
  o Jessica Bednarz, Director of innovation & Training @ the Justice Entrepreneurs Project
• **Key Learning Objectives:**
  o Understand the origin of the billable hour’s prevalence in legal service pricing
  o Consider alternatives to the billable hour and understand appropriate situations for each alternative
  o Understand fees from a client’s perspective
  o Think of the value provided by attorneys using metrics that do not include time
  o Introduce the CBF Pricing Toolkit
• **Timing:** First Week

Process Mapping & Project Management dashboard
• **Speaker:** Paul Lytle, Lytle & Milan, LLC & JEP Alumnus
• **Key Learning Objectives:**
  o Identify processes within solo/small firms
  o Construct relevant process maps
  o Recognize and remove activities that do not add value and vice versa
  o Learn to engage clients in process change efforts
  o Learn how legal project management can benefit solo and small firm practices
  o Identify techniques to measure improvement in the productivity and efficiency of legal work
• **Timing:** First Quarter

Setting Pricing for your Legal Services & Marketing them on your Website dashboard
• **Speakers:**
  o Bob Glaves, Executive Director, The Chicago Bar Foundation
  o Nora Endzel, Endzel Law LLC & JEP Alumnus
  o Jessica Bednarz, Director of Innovation & Training @ the Justice Entrepreneurs Project
• **Key Learning Objectives:**
  o Review examples of alternative pricing structures and apply them to individual practice areas and legal service offerings
  o Use real world examples to workshop innovative pricing options
  o Explore the benefits of a dedicated pricing page on your website and associated tips, examples, and resources
• **Timing:** Second Quarter
Screening Clients, Setting Expectations, Parting Ways & Related Tech Tools

- **Speakers:**
  - Agostino Filippone, Chokshi Filippone Law, LLC & JEP Alumnus
  - Cindy Campbell, The Law Offices of Cindy K. Campbell & JEP Alumnus
  - Roya Samarghandi, Carmel Law, LLC & JEP Alumnus

- **Key Learning Objectives:**
  - Discuss how to develop case acceptance guidelines the importance of sticking to them
  - Learn techniques for effectively screening clients and warning signs of problem clients
  - Learn how to discuss alternative fee arrangements and payment plans with potential clients and how to determine when limited scope representation is an appropriate option
  - Learn techniques to establish attorney-client relationships built on trust and mutual respect
  - Discuss what to do if problems arise during the attorney-client relationship
  - Highlight tech tools designed to make the client intake process more streamlined and user-friendly

- **Timing:** Second Quarter

Engagement Agreement Workshop

- **Speakers:**
  - Roya Samarghandi, Carmel Law, LLC & JEP Alumnus
  - Sonny Thatch, Thatch Law Group & JEP Alumnus
  - Alyease Jones, The Law Office of Alyease Jones & JEP Alumnus

- **Key Learning Objectives:**
  - Understand ethical obligations in attorney-client engagements
  - Discuss essential elements of client engagement, non-engagement, and disengagement documents
  - Learn what to keep in, and what to keep out, of personalized engagement documents
  - Discuss how to set guardrails and what types of pricing and communications provisions should be included in your engagement agreements

- **Timing:** Second Quarter

Badge 3: Marketing, Communications & Business Development

Target Outcome: By the end of the JEP program, the participant will be equipped with the skills and knowledge needed to create and market a value proposition and build and maintain client and business development relationships.

Building Your Business Development Foundation

- **Speaker:** Holly Barocia, Principal Consultant @ Akina, a GrowthPlay Company

- **Key Learning Objectives:**
  - Create a framework for successful business development
  - Learn to effectively communicate what you do, who you can help, and what problems you solve
  - Identify tools that can help develop business opportunities during the early months of JEP participation
• **Timing:** Day Two

**Internet Presence for Attorneys** dashboard
• **Speaker:** Gyi Tsakalakis, CEO and Founder @ AttorneySync
• **Key Learning Objectives:**
  o Learn about tools to create websites and best practices in web design and hosting choices
  o Introduce common social media platforms that increase outreach
  o Identify free and low cost resources available to increase internet visibility and impact, including search engine optimization (SEO)
• **Timing:** First Week

**Social Media Marketing** dashboard
• **Speaker:** Chelsey Lambert, Social Media Expert & Founder of LexTechReview
• **Key Learning Objectives:**
  o Learn about maintaining relationships and driving business through social media
  o Understand how to leverage a personal brand to create authentic communications and engagement
  o See examples of successful digital outreach campaigns
• **Timing:** First Quarter

**Bio Writing Workshop** dashboard
• **Speaker:** Erin Baxendale, Director of Business Development & Marketing @ Sidley Austin
• **Key Learning Objectives:**
  o Overview of principles for a good attorney/firm bio for a solo or small firm lawyer serving the consumer market, and tips on talking about JEP involvement
  o What research tells us consumers/potential clients look for from their lawyers and how bios can help accentuate the most important characteristics
  o Hands-on participant involvement in reviewing or drafting their website bios, possibly with feedback from the presenter or others
  o Tips on adapting the website bio for LinkedIn and other key social media outlets
• **Timing:** First Quarter

**Community Engagement & Mentoring** dashboard
• **Speaker:**
  o Dan Cotter, Partner @ Butler Rubin & Past President of The Chicago Bar Association
  o Daniel Brown, The Main Street Attorney & JEP Alumnus
• **Key Learning Objectives:**
  o Discuss benefits of community involvement
  o Understand opportunities for attorneys to become involved in their communities through board service and leadership, volunteering, pro bono work, mentoring, networking, teaching, writing, and speaking
  o Understand benefits of mentoring from both sides of the relationship
• **Timing:** First or Second Quarter

**JEP Firm Presentation Series (2-3 Sessions Total)** dashboard
• **Speakers:** JEP Participants
• **Key Learning Objectives:**
  o Learn how participants honed in on their practice areas
  o Understand who JEPers consider their target clients to be and how they developed that focus
  o Discuss the process of pricing legal services transparently and affordably
  o Discuss practice management technology and tips
  o Hear business development and marketing success (and failure) stories
• **Timing:** Second Quarter for Newer Participants; Final Quarter for Presenters

**Messaging & Media Training** dashboard
• **Speaker:**
  o Colleen Strasser, Senior Public Relations Specialist @ Skadden
  o Brooke Loucks, Global Marketing & Communications Project Administrator @ Skadden
• **Key Learning Objectives:**
  o Discuss useful JEP talking points and messaging strategies
  o Formulate messaging specific to individual practices
  o Learn tips and techniques to successfully interact with interviewers
  o Workshop responses to common questions in interview simulations
• **Timing:** Second Quarter

**JEP Service Standards, Customer Service & Tech Audit** dashboard
• **Speaker:**
  o Trevor Clarke, Director @ the Justice Entrepreneurs Project
  o JEP Alumni
  o Someone from Wicker Park Group?
• **Key Learning Objectives:**
  o Understand requirements of JEP Service Standards
  o Discuss brand consistency and the opportunities created by consistently high standards
  o Workshop strategies to address any potentially challenging standards
  o Understand the importance of good customer service and how it relates to business development
  o Learn tools for collecting and analyzing client feedback and taking action
  o Construct client journey maps
  o Discuss the tech audit
• **Timing:** Second quarter

**Akina Coaching Kickoff** dashboard
• **Speaker:** Holly Barocia, Principal Consultant Akina, a GrowthPlay Company
• **Key Learning Objectives:**
  o Meet individual coaches to work with one on one over the coming months
  o Review effective communication strategies about
  o What you do
  o Who you can help
  o What problems you solve
  o Schedule follow up meetings and definitive next steps with an Akina business coach
• **Timing:** Third Quarter
Presentation Training dashboard
- **Speaker:** Anne Gallagher, Director Global Communications @ Jenner & Block
- **Key Learning Objectives:**
  - Understand principles for giving effective presentations in any setting
  - See examples of good and bad practices in presentations
  - Gain hands-on practice using the techniques and principles
  - Leave with tools and techniques for your own presentations in your practice
- **Timing:** Annually

Internet Forms, Web Building, Chatbots & Other Tech Tools Tools for Attorneys dashboard
- **Speaker:** Conor Molloy, Chi City Legal LLC & JEP Alumnus
- **Key Learning Objectives:**
  - Bask in glow of JEP’s own tech guru and ABA Hackathon winner
  - Understand options available through common website plugins
  - Learn to incorporate internet feedback into practice documents
  - Discuss using technology to make your practice more efficient
- **Timing:** Annually

Badge 4: Risk Management

Target Outcome: *By the end of the program, the participant will understand ethical and security concerns associated with operating a law firm and how to mitigate these risks.*

Risk Management dashboard
- **Speaker:** Bill Lansdon, Regional Sales Director, and a claims attorney from Minnesota Lawyers’ Mutual
- **Key Learning Objectives:**
  - Identify common areas of malpractice
  - Understand the best practices for intake and engagement
  - Learn about common sources of malpractice claims (and how to avoid them)
  - Gain tips to minimize risk (hint: avoid dabbling!)
- **Timing:** Day Two

Trust Accounting and the Rules of Professional Conduct dashboard
- **Speaker:** Christine Anderson, Director of Probation & Lawyer Deferral Services @ the Illinois Attorney Registration and Disciplinary Commission
- **Key Learning Objectives:**
  - Learn how and when to use a trust account
  - Understand ethical pitfalls for new and solo attorneys and how to avoid them
  - Learn about the resources and support available through the ARDC
- **Timing:** Day Two

Privilege, Confidentiality & Work Product dashboard
- **Speakers:**
  - Alan Neff, Attorney and Author
  - Trevor Clarke, Director @ Justice Entrepreneurs Project
  - Jessica Bednarz, Director of Innovation & Training @ Justice Entrepreneurs Project
- **Key Learning Objectives:**
  - Understand privilege, confidentiality, and the work product doctrine
  - Apply concepts of privilege and confidentiality to a shared office environment
  - Discuss ethical representation obligations, including conflict checks
  - Understand requirements and responsibilities of partnering with another attorney
  - Discuss different firm structures and alternative relationships between co-working attorneys
  - Consider benefits and downsides of partnering
  - Ask the ethics guru anything in the “ethics free for all”

- **Timing:** First Week

**Referring Cases dashboard**
- **Speakers:** Alex Memmen, SharksAtLaw, and Jeff Moskowitz, Esq.
- **Key Learning Objectives:**
  - Understand ethical rules and obligations associated with referring cases
  - Discuss continuing responsibilities and liabilities in some referral relationships
  - Consider reasons to refer cases and benefits gained from quality referrals
  - Hear war stories about referrals from experienced practitioners
- **Timing:** Second Quarter

**Document Assembly & Business Continuity Planning dashboard**
- **Speaker:** Catherine Sanders Reach, Director of Law Practice Management & Technology, The Chicago Bar Association
- **Key Learning Objectives:**
  - Learn what document assembly technology is and how it can be used in law practices
  - Discuss free and low-cost options and tricks that are readily available through commonly owned software
  - Understand how to turn on and use features of Microsoft Word
  - Use Microsoft Word to create an automated document to use in practice
  - Learn how to build good succession planning practices into your firm from the beginning
  - Develop a business continuity plan for individual firms
- **Timing:** Second Quarter

**Badge 5: Entrepreneurship & Innovation**

*Target Outcome:* By the end of the JEP program, the participant will have been exposed to numerous examples of entrepreneurship and innovation both inside and outside of the legal profession and will have learned practice tips on how to take a more creative approach to the practice of law.

**JEP Law Firm Startup Stories dashboard**
- **Speakers:** JEP Alumni
- **Key Learning Objectives:**
  - Gain first-hand perspectives on key startup questions including:
    - How did you determine practice areas?
    - Who are your target clients and how did you develop that focus?
    - How can you price legal services transparently?
    - What is the best practice management technology to use?
How did you go about business development and marketing?
What was the hardest part of starting your practice?
Is there anything you know now that you wish you would have known on day one?
Were there times you wanted to give up, and if yes, how did you push through?
  - Learn about vendors and essential resources, provided through the JEP or otherwise, to help practices get up and running (e.g. banking, business card printing, logo design, headshots, etc.)
  - Get inspired!

Timing: Day Two

Entrepreneur Series – Legal dashboard
- **Speakers:** Various entrepreneurs from the legal industry
- **Key Learning Objectives:**
  - Gain first-hand accounts of innovation in a field not known for being innovative
  - Understand motivations and processes of successful legal entrepreneurs
  - Ask questions of, and make connections with, pioneers in the legal field
  - Apply insights gleaned to personal practices
- **Timing:** Once Every 6 Months

Entrepreneur Series – Startups dashboard
- **Speakers:** Various local entrepreneurs from outside of the legal industry
- **Key Learning Objectives:**
  - Gain first-hand accounts of innovation from other industries
  - Understand motivations and processes of successful entrepreneurs
  - Ask questions of, and make connections with, individuals outside of the legal industry
  - Apply insights gleaned to personal practices
- **Timing:** Every 6 Months and as Available for Out-of-Town Presenters

Badge 6: Law Firm Operations & Technology

**Target Outcome:** By the end of the program, the participant will understand how to leverage law practice management resources, technology, and outside support to operate an efficient and profitable law practice.

Tax Issues & Entity Formation dashboard
- **Speakers:**
  - Cliff Helm, Helm Business Law & JEP Alumnus
  - Jim Plucinsky, LP Tax Law & JEP Alumnus
- **Key Learning Objectives:**
  - Understand business entity options and tax considerations
  - Introduce budgeting concepts
- **Timing:** First Week

Business Planning & Value Propositions dashboard
- **Speaker:** Trevor Clarke, Director, Justice Entrepreneurs Project
- **Key Learning Objectives:**
Discuss firm visions, practice focuses, and business planning basics
- Understand the value attorneys can offer to clients
- Circulate the Business Model Canvas and discuss each segment of it and how they apply to law firms and connect them with future trainings
- Discuss key elements of successful value propositions
- Participants will share their business plans the next day

- **Timing:** First Week

**Law Practice Management & Technology** dashboard

- **Speaker:** Catherine Sanders Reach, Director of Law Practice Management & Technology @ The Chicago Bar Association

- **Key Learning Objectives:**
  - Envision the perfect practice from a technology standpoint
  - Understand software options for time/billing, accounting, calendaring, case management, and document creation
  - Discuss differences between SAAS and single license software models
  - Learn about hardware technology options

- **Timing:** First Week

**Client Facing Technology & Communications** dashboard

- **Speaker:** Catherine Sanders Reach, Director of Law Practice Management & Technology, The Chicago Bar Association

- **Key Learning Objectives:**
  - Understand considerations for client email and document sharing
  - Identify web interfacing options and available client portals
  - Evaluate task management tools
  - Learn the best communication practices for engaging and keeping clients
  - Understand the ethics rules associated with technology and data privacy and how you can best protect confidential client information from unauthorized access or inadvertent or unauthorized disclosure.

**JEP Firm Presentation Series (2-3 Sessions)** dashboard

- **Speakers:** JEP Participants

- **Key Learning Objectives:**
  - Learn how participants honed in on their practice areas
  - Understand who JEPers consider their target clients to be and how they developed that focus
  - Discuss the process of pricing legal services transparently and affordably
  - Discuss practice management technology and tips
  - Hear business development and marketing success (and failure) stories

- **Timing:** Second Quarter for Newer Participants; Final Quarter for Presenters

**Legal Technology Vendor Series** dashboard

- **Speakers:** Various

- **Key Learning Objectives:**
  - Identify problems technology is designed to address
  - Understand how to use technology in solo and small firm practices
• Learn how to apply technology to specific practice areas
• Ask questions of the vendors and learn of JEP-specific discounts and opportunities

**Timing:** First Quarter for Case Management Software & as Opportunities Present Themselves for New Tech Partners During the Second Quarter

### Budgeting dashboard

- **Speaker:** Marti Freund, Research Associate @ Cornerstone Research
- **Key Learning Objectives:**
  - Understand the use and applicability of budgets
  - Learn about tools that can assist in budgeting
  - Talk about revenue targets and categories of income and expenses as they relate to law practices
  - Apply real world numbers to the JEP template budget and learn how to customize the template budget to individual practices
- **Timing:** First Quarter

### Accounting dashboard

- **Speaker:** Matt VanHoeven, CPA
- **Key Learning Objectives:**
  - Learn about various expense and deduction categories commonly used by small businesses and solo practitioners
  - Discuss tax consequences of different business entities
  - Understand estimated tax payment obligations
  - Ask a small business accountant targeted questions
- **Timing:** First Quarter

### Document Assembly & Business Continuity Planning dashboard

- **Speaker:** Catherine Sanders Reach, Director of Law Practice Management & Technology, The Chicago Bar Association
- **Key Learning Objectives:**
  - Learn what document assembly technology is and how it can be used in law practices
  - Discuss free and low-cost options and tricks that are readily available through commonly owned software
  - Understand how to turn on and use features of Microsoft Word
  - Use Microsoft Word to create an automated document to use in practice
  - Learn how to build good succession planning practices into your firm from the beginning
  - Develop a succession plan for individual firms
- **Timing:** Second Quarter

### Paralegal Use dashboard

- **Speaker:** Cindy Campbell, Professor of Legal Research @ Wright College & JEP Paralegal Intern(s)
- **Key Learning Objectives:**
  - Meet JEP paralegal interns
  - Learn capabilities of paralegals
  - Discuss appropriate usage of and demands on paralegal support
- **Timing:** As the JEP Brings on New Paralegal Interns
Affordable Care Act & Other Types of Insurance dashboard
- **Speaker:** Drew McCormick, Marketplace Navigator/Additional Training
- **Key Learning Objectives:**
  - Understand the requirements of the Affordable Care Act
  - Discuss marketplace options and strategies for coverage
  - Learn about tax consequences of alternate options
  - Learn about other types of key personal and business insurance options like disability, life, and business liability insurance, including cyber liability
- **Timing:** Annually (October)

**Badge 7: The Practice of Law**

*Target Outcome:* By the end of the program, the participant will have acquired the hard and soft skills and knowledge needed to practice law in Cook County.

Daley Center Tour & Judges Panel dashboard
- **Speaker:** Judges and staff from the Circuit Court of Cook County Clerk’s Office, Sheriff Office, and Library
- **Key Learning Objectives:**
  - Tour the Circuit Court divisions with clerks in the Family, Law, Probate, and Chancery divisions
  - Meet librarians and tour the law library
  - Talk to Sheriffs about service of process procedure
  - Obtain Sheriffs IDs
  - Understand pro se help options in the court system
  - Hear a panel of judges discuss courtroom etiquette
  - Learn the secrets of the Daley Center elevators!
- **Timing:** First Week

Lexis Advance dashboard
- **Speaker:** Jeanne Doran, Client Manager, and Terri Sorrentino, Legal Solutions Consultant @ LexisNexis
- **Key Learning Objectives:**
  - Understand the tools available through Lexis Advance
  - Review techniques for researching case law and statutes
  - Identify templates and form resources useful for solo practitioners
- **Timing:** First Quarter

Resilience/Wellness dashboard
- **Speaker:** A Health and Wellness Professional
- **Key Learning Objectives:**
  - Understand principles of wellness and resilience and how they are key to effectively connecting with clients and colleagues
  - Learn techniques and best practices for managing stress inherent in a startup environment
  - Learn practical strategies for bouncing back from adversity or setbacks
• **Timing:** Second Quarter