

## **CASE #1**

**Background:** 34-year-old female client with 3 years experience as defense insurance associate in large firm. Works in metropolitan area.

**Goal:** To establish a partnership practice in the area of Personal Injury/Plaintiff

**Strategy:** 1. Business Plan, 2. Marketing plan 3. Partnership Agreement

**Results:** Client decided on a virtual office as she has young children at home and wants to work from there.

Partnership wasn't feasible because of life style and time commitment differences. This was discovered while working on the partnership agreement.

Was decided that client would work with intended partner on some cases as they came up and would keep a good relationship for possible future partnering.

### **Long Range Planning:**

1. Strengthen referral base which is in place.
2. Build practice carefully so as not to conflict with time for the children.
3. Set up network
4. Look to expanding out of home office when children are older.

## **CASE #2**

**Background:** A 32-year-old male client practicing for 4 years as a litigation associate in a small but very aggressive office handling large cases.

**Goal:** Create a steady growth pattern ending in a sole practice in an area guaranteeing a high level of satisfaction.

**Strategy:** Long Term Business Plan which will support growth but be flexible enough to provide a path for eventual solo practice.

**Results:** Client was able to make a transition to a larger firm where he could earn more, and have exposure to more cases. After 3 years at that firm, he was able to start his practice. This provided the support to then make a transition into full time mediation which is fulfilling as well as very lucrative and where he is presently practicing. Plan took over 5 years to complete.

### **CASE #3**

**Background:** A 53-year-old female client who had been in public service for the past 10 years after entering the legal field later in life as a second profession. Background had been with Corporations. Job did not seem fulfilling and was too stressful.

**Goal:** Explore the reasons that the job was not satisfying and determine if a job change was reasonable.

**Strategy:** Work on lists of must haves, nice to haves, and not to haves in the job. Create a working mission statement which will guide the client in resolving what her real needs are in the workplace. Identify long term goals for growth and working towards semi-retirement.

**Results:** At completion of work, it was discovered that the job was satisfying but that through poor time management, the client's life was out of balance and more focus needed to be put into creating personal fulfillment outside the office.