

**#178: Tech Competency for Law Firms
with Mitchell Zoll**



Full Episode Transcript

With Your Host

Melissa Shanahan

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I'm Melissa Shanahan, and this is *The Law Firm Owner Podcast*, Episode #178.

Welcome to *The Law Firm Owner Podcast*, powered by *Velocity Work*. For owners who want to grow a firm that gives them the life they want. Get crystal clear on where you're going, take planning seriously, and honor your plan like a pro. This is the work that creates *Velocity*.

Melissa Shanahan: Hello. All right, so today, we have a conversation coming to you between me and Mitchell Zoll. He's a longtime Mastery Group member. It was a pleasure talking to him about the way he thinks about things, and also some things he's really into, and he's presenting, and he's working on.

It's all to do with tech inside of his law firm, and automation and workflows, and making sure that things are as easy as possible. He's very into delegation, but he's even more into automation. Listening to him really think through some of his own resources that he's come up with. He has a knack for sharing with other attorneys that same thing, and helping them brainstorm, and think through, here's where you start.

Now, he and I have been chatting, and he's going to start hosting a workshop, for Mastery Group members, every single quarter. And I am pumped about this. He's got so much wisdom to share, and he's the kind of guy... I mean, he's on calls with Mastery Group members all the time, thinking through these things and helping people. And, I really love that. He loves connecting with other members in a helpful way.

So, he's going to start leading this workshop every quarter, around tech and automation, for Mastery Group members. And for those of you who aren't familiar with Mastery Group or what it is, it is an incredible program for law firm owners. We facilitate quarterly strategic planning, with accountability and coaching in between the quarters, so that you can honor your plan. So that you stay focused on the work that creates *Velocity*.

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The community is rich, and this is just another example, with Mitch hosting this workshop, of that being the case. So, if you would like to be in the know for the next enrollment window, go to velocitywork.com/join, so that you can get yourself on the list and be clued in when enrollment opens. Which will be in the middle of the first quarter, probably towards the end of February.

But yeah, go get on the list, so you can take part in fun things like this. With amazing law firm owners who are doing it; they are doing the work that creates *Velocity*. And *Velocity* they are creating, my friends, towards their goals and their vision.

Alright, everybody, without further ado, enjoy my conversation with Mitchell Zoll.

Welcome to this week's show everyone. I am here with Mitchell Zoll.
Thanks for coming on the show.

Mitchell Zoll: Thanks for having me. It's funny. I've listened to your podcast and I hear everybody start with, "I'm so excited to be here." And honestly, being on this side of the mic, I'm excited to be here. It's fun; I get what they're feeling, now.

Melissa: Oh, that's funny, because I also always say, "I'm so excited to have," and I really am, every time. It's not just a line. So, yeah. Well, Mitch, I have known for over two years now, maybe two and a half years. And we can talk about how we met, but he was like, oh, gee, with Sprints and Mastery Group way back in the day. So, he's been around.

He is a very interesting human. He lives in Texas. He has an awesome business, an awesome law firm. And he's up to interesting things, which is why I wanted to have him on today. Just all of the above. I thought that, as a listener, you probably appreciate the kinds of things we're gonna talk about today.

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I told Mitch, before he came on, the reason I wanted to have him on is because he and I have conversations. And sometimes I wish that other people could hear the conversation, because I think they would like it and they would probably get value out of it. So, I just thought; well, come on. We'll do it. We'll just have one.

Well, Mitch, do you want to share a little bit about yourself; who you are, where you are, your law firm, etc.?

Mitchell: Sure. I am a solo in Austin, Texas. I represent small businesses, as I say, "from startup to wind up." I stole that from somebody else. So, no trademark there. And I help form businesses, and buy and sell businesses. I started my career with large regional firms; 200-person statewide Texas firms, and kind of bounced down. And pre-COVID, had the opportunity to go solo, and a supporting wife and an opportunity, so I thought; let's make this happen. So, I've been solo since 2019.

Melissa: That's so great. You're saying solo, but you're not solo. This is the bone I have with people, to pick.

Mitchell: I know, I stuttered on that, wanted to say true solo. I have two virtual assistants that have been with me. I have an outsourced CPA that I use, but I'm the only one in this room. So, fighting the thing, I am a true solo in my heart, even though I have people who help me.

Melissa: Well, that's yeah, that's fair. As long as people understand. I don't know, sometimes I think people say that, and they do themselves a disservice. Because I mean, think about, I have been a part of your journey. I know you've had to really train these people, some people haven't worked out, like there's real time and commitment has been put into team.

So, it's like undercutting yourself and your firm by saying solo. It's like, no, I got a team. And, you know, maybe it'll always stay that size, I'm not saying you always want to keep growing it. But I just like for people to give credit

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where credit is due. And you've done a lot of really cool work with these assistants. So, okay, and you have a background in consulting.

Mitchell: I do. Before going back to law school, I was with Accenture™. So, I was what we called “a business process redesign consultant”. And we would come in, and help companies do what they do better through technology. And then, we did some strategy consulting, as well. And it was everything from the largest companies that you know, to government, to startups. We looked at: What do you do? How can you do it better through technology?

Melissa: Okay, that fascinates me, your knowledge set there. I know that your knowledge set there is pretty powerful. And it kind of explains what we're going to share with everybody. Just what you're up to, what you're focused on, right now. It just lends itself to you being really great at what you're focusing on now, because of your history. That's cool.

Well, okay. There are a few things I want to cover with you. First, can you please tell the story of when you took a trip to Rome, and an epiphany or not an epiphany, I don't know, you were floored by something you learned.

Mitchell: I finally... I was sharing with you during one of our coaching groups, I finally understood a phrase that I had been hearing for a very long time, which is, “Rome was not built in a day.” And I had always heard this phrase and thought, yeah, it takes a long time to build something big. Or, you can't build something in a day, takes a couple of weeks, give it time.

But as we were walking around Rome, we had a tour guide, who could have been making up half the stories they were telling, but I loved it. And you would see some current cars, the roads, the bus stops. But you would also see where they excavated and its time BC, and the churches that had been raised and lowered. And some of these parts were taken from other parts.

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And he said, “Yeah, that's what we mean by ‘Rome wasn't built in a day.’ It is constantly evolving. And to have this great city and this great monument, it's not built in a day. It's something that's continuing to evolve and continuing to be worked on.”

Melissa: I mean, I remember you talking about you were looking at a building, and the street, I don't remember exactly, but it seemed like the street that you were standing on, looked like the bottom of the beginning of the building. But that there were so many layers below the street, is that correct?

Mitchell: Yeah, one of the churches, you can't even get to the front door without climbing up 20 feet. And then, all the layers down. And you can see all of the different buildings. They're still excavating things now. And even one of the tour guides said, “If we had more money, we would find more things.” It's just a matter of the constant build and constant extra excavation. There are always more stories underneath the rubble that you're on.

Melissa: Wow. “There are always more stories underneath the rubble that you're on.” Okay. Well, I'm sure that this sort of spread through your brain in many areas of life, and how this is applicable. But you did explain how you think about that, or how it shaped some thinking around business, and building and growing your firm.

Mitchell: Yeah, I've been part of the coaching group, since I think, May 2019. And we're constantly working on what's next and what's next. And as a solo, if you're solo, or just a solo, you're thinking this linear path, right? If I keep building the bricks, it becomes this great monument. And, I just need to keep building the bricks.

But taking that phrase, you start realizing it's not this linear path of growth to this big firm with your name on the building. Sometimes it's building up, sometimes it's digging down. And it's this constant evolution of, where am I today? And, what do I need to do, this next step? But it's not going to be

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built in a day, and it's not going to be straight and linear path to the plan that you want to execute.

Melissa: Yeah, 100%. I feel like that's something that makes it interesting and fun to have a community around that in Mastery Group, for example. Because everybody's on a different point in their journey. And sometimes it feels like two steps forward, one step back. Or, one step forward, two steps back; it's not linear. It's very pieced together, deliberately and intentionally.

But it's like one foot, and then the next foot, and then the next foot, all lining up with this place that you've said, "This is what I want to create. This is where I want to ultimately go." And, you're lining yourself up with that. But to your point, it's not a straight line; it's like a zigzag. It's up and down, and all around, and that's just the nature of it.

You can't get away from that if you're going to build something successful. That's just how it's gonna go. It's nice to be in a group of people that are all experiencing that together.

Mitchell: And there's times you have to tear down your monument. There's times when you build something up and you think; this is it, this is it. And, you get to it, and it was good for the time that it was there.

But if you hold on to it, and you're not willing to tear that down, you're actually stopping your progress to go; you know what? I went down that path, but maybe it's time to tear down that monument and build a new one. And so, that's what you see, in live action, in Rome. And also, can be what you see in our own practices.

Melissa: Yeah, definitely. Well, tell everyone your experience of being a Mastery Group. Like just your high level, just like why are you still in it?

Mitchell: You'll hear everybody talk about the community and the people that have been in it. We all, so we talk offline, sometimes we share stories, we share resources. One of the things that helped me early on... Because I

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think the demographic of people who really connect with what you are working with, are people who want to better themselves. Who are looking at new tools, and tips, and practices.

But there's a lot out there. There is a lot out there that you can get sidewise. And you read all the books, and then you have a stack of books, but you don't have anything, progress, on it. And early on, we were all sharing the tools that we had; oh, I've got a remarkable. And I read this book, and this...

And we had a moment, as a group, where we said; sometimes it's best to just quiet the noise, and stick with one thing and do that well. And that'll get to where you are, versus kind of dipping your toe in, and going; maybe that wasn't it. Dipping your toe in, again. I shared with you that my mom's joking advice, when we had our first child, was, "You can read one book, or you have to read all of them."

Because if you read two, they're not going to match up and you're going to be confused and say, I don't know what to do. She said, "Just read one." We didn't even read the one; abandoned it. And we thought, we can figure it out. And that kid's about to go to college. So, I think we figured something out, eventually.

But in that concept, I've stuck with this one. And like, people in the group, there have been times when other stuff has been going on, where I had to pull back a little bit. We've all... As a solo, you have the family things pop up, you have the work things pop up, and you have to back off.

But there are times, when I know this is my home base. I know this is my community. And, I'm committed to that one. And, it has gotten me to where I want to go. So, I'll come back in and I'll keep going with it. Because I know it's that home base. I've committed to the processes that are here.

Melissa: Mm-hmm. That makes my heart sing. That means a lot, that it's your home base. And, I know that's not about me. It's just, I think this group

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is special. It's just your way of saying the group is special. This is what you come back to. Yeah, definitely.

And gosh, it's come a long way. When you first joined, it really was the Sprints, at the beginning. And they weren't even called Sprints at the beginning, it was called Mastery Group. So, it's evolved. It's kind of like the, the monument you were talking about. And then, it's like, oh, okay, here's the real monument and there'll be another one someday.

But when you joined, it was really the idea of the Sprints, which is something we used to host for the public. And, it is where you claim one result you were going to do that month. And then, we showed up on a call every single day, Monday through Friday. You had to report in, there was a tracker, you had to state a lesson learned; it was it was pretty deep and meaningful. And yeah, it was awesome. I really enjoyed it.

And then, that's hard to do every single month. So, then, over time, it was like, okay, people wanted to still continue a conversation, and continue some accountability, and open to coaching. Didn't know what that looked like, because a Sprint was just not ideal for everybody, every month. And so, that's when we started the group that is more ongoing; which is what it is now.

And over time, it took a bit for me to figure this out, but over time, it just made sense that this group should be centered around quarterly strategic planning. And then, there's coaching, and accountability, and other stuff in between to be helpful and supportive.

And that, finally, when it clicked into place, it was like, oh, this makes sense. There's something that this group is centered around. It's not like we just have a new topic every month, and we're gonna just... It's a little more willy-nilly. We finally got some concrete stuff around it.

So, you've been there to see that whole evolution. And here we are, and we're just getting better. And also, you probably didn't know this, but I'm

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gonna put together like, a board of members, so that we can make community decisions about the things that get implemented first, and, you know, prioritize things. And yeah, it's just getting better, and better; which is awesome. And, the members are awesome. So, I'm really glad...

Mitchell: It is a good community, and it's fun to see... It's not just, join in and get spoon-fed something, and then get out. Folks here are committed. Folks here are talking offline. I've seen people who became members, and then they've evolved to lead their own little offgroups. And it's something available to you to, "Hey, let's work on our Monday Map. Let's work on Friday Wrap together." Because it's training; it's not learning it's training. It's developing the muscles; it's developing the process.

And I was talking with somebody who's in the group, we were talking offline and sharing resources. And they said, "You know, I'm kind of new. What do you know about this group?" And I said, "If you commit to doing the work in this process, then you'll get out of it what you need." And that's a big ask, sometimes. To really sit down on a Monday and think through; what am I going to do this week?

That doesn't always happen. The weeks it happens, I see that huge benefit. Okay, I gotta go back and do that. Like eating healthy, like working out, like all the things. When you really do it right, you say, "Ah, there it is." And sometimes, you need that constant reminder; hey, this is what you got to do. This is what you got to do.

Melissa: Yeah. I think it is tough. I mean, most law firm owners are busy and feel spread thin. And it can feel like; oh, well, there's a new focus I'm bringing into my world. But I said this last week, when I was talking to a group. That I really mean this, the reason the company is called *Velocity Work* is because we focus on the work that creates velocity; that is what I want for everybody.

So, I don't want people to just come in and feel like it's taking up space. I want people to feel like they could come in, and sink their teeth into it, and

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figure some things out, have some support, have the group, but also facilitation. And I love what you just said, “It's not learning, it's training.”

Yeah, I think of myself... I get clumped in with coaching and coaches, and that's fine. But it really is facilitating; that's what it feels like. It's facilitating people to unearth the things they need unearthed, so that they can make the plans that they need to make, and they can line themselves up with it.

There's no blueprint for that. Everybody's kind of got to dig in for themselves and navigate this. And my goal, with what we've built, and what we'll continue to build even more and better in the future is that, that facilitation makes it so that you go faster, further faster, because of the facilitation.

You talked about the “dip the toe”. So, when people come in and onboarding, though, we've gotten it really clear and much better and tighter, so people can get comfy, faster. It is a lot to learn when you first come in, and then after that, it's not that much time. You know, we have a retreat every quarter. That's a day for planning. And then, we have the weekly calls.

And some people make it live, some people don't; they listen to it on their own, they have private podcast feed. They can listen to it later, or video, and it's not that much time. But if you're gonna give focus to the things that are talked about, it does mean that you have to carve out time to give focus to the things are talked about.

And there's no Pass-Fail thing; everybody does what they do. Some people sink in and they jump in with both feet. Some people have one foot in, one foot out, and they're trying to get both feet in. But I will say, if you are a “dip the toe” kind of person, were like, “I'm just gonna try this out and see what it gets me,” that mentality, just don't join.

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Because, I mean, you decide what you're gonna get out of it. Don't put it on us to like, I will meet you, I will meet you where you are. But you can't like dip the toe. What am I supposed to do with that? So, yeah.

Mitchell: Yeah, and no coaching program will. Other than outsourcing it, which is perfectly fine, you put your name on the check, and then you walk out the door; no coaching program will. And all of them can work, if you commit.

And the early groups, we were listening to your early podcasts, and I just wanted to search for the episode so hard. But there's one episode where you're talking about somebody who committed to doing something, but then didn't really follow through with it. And, they started giving excuses.

This is one we were listening to, you're like, "I'm sorry, no." And that actually pops up in my head, every once in a while. When I start to deviate off of my map or, you know, I said I'm going to do something and then someone starts calling. I hear that, Melissa, "I'm sorry, no. I can't do it. Okay, I gotta go back to it."

And so, those little echoes help remind you to get back in. But you have to, as you say, honor your map. You have to actually listen, when you say, "No, don't deviate. Do your plan," and then, it will work out.

Melissa: Yeah. And that's a journey, I totally get that. I don't hold people to a standard of perfection. But you do have to call your own stuff, you know? And you're right, there are great programs out there that will really give you leverage, if you just go all in on it. But people don't do that. And so, I guess that's what I mean. Like if you're not ready... Either, if you identify as a "dip the toe" kind of person, this probably isn't going to be it for you, and probably no program will be it for you.

So, there's that. Yeah, that mentality won't get you anywhere very far, very fast. But then, the other part of that, is it dilutes the community when there's dip the toe kind of people in there. And I really do see it as part of my job, is

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to be really protective of the quality of the community. It does not mean that you have to show up to every call. It does not mean you have to... None of that.

But it means that you take full responsibility for the results that you get. And I will definitely, and so will the group, meet you there and be willing to kind of hash through it. But you're responsible for the results you get, ultimately. I want to do everything I can to give you the leg up that you should get. But yeah, just dip the toe people... Also, if they're dip the toe people, they might not be a listener.

I feel like I'm not a dip the toe attractor; but maybe I am.

Mitchell: Well, they're shoppers, and that's fine. This isn't like a beatdown on the person who's not ready to commit. But the element is, if you are thinking about doing something like a coaching program, then think through why.

And the old knock on consultants, that I heard 1,000 times is, oh, you just tell people what time it is with their own watch. And the answer was, yeah, but you had to ask. Yeah, you didn't know what time it was. So, you can tell yourself your time all on your own. But you don't know, and that's why you just hired Accenture, Deloitte™, or something?

It's the same thing. Yes, you can do this on your own. You can lock yourself in your office and get that stuff out. But if you're not, that's the time to start asking yourself; why and what do I do differently?

Melissa: Yes, yeah. And you know, something else, you said... Oh, that's so funny. I love that you just shared that. That also, to build on what you just said, is that you can do it on your own. And some people are just kind of built for that; that's what they prefer. And, that's great. But I would say, that joining something and constraining down to something, no matter what program you pick, will create velocity towards where you want to go.

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So that, I think, joining something will help do that. And on top of that, because that's like the company focus, is we really try to line up the work with that in mind. What is going to give you the most leverage, the quickest? And that does not mean we don't offer solutions for every part of the firm.

Like, I am not a marketer; I will never be a marketer. I'm never going to tell you or give you marketing advice, or tips or tools. But everybody in Mastery Group has Rocks, or quarterly priorities, that at one point or another, they've had one that's centered on marketing. They're very clear on what they need to get done. And they go get the support or help that they need, and they knock it out of the park for that quarter.

So, it like tees you up. I think is the best way to say that, for all the stuff that really should be happening in the firm.

Mitchell: It is funny when you hear things over your lifetime that stick with you, even in the hardest situations. I actually completed a marathon once. And it's been so long ago, that like the people in my orbit have looked at me and go, "You can't claim that anymore." Okay, I can still claim it, I still have a medal.

But we did it through Team In Training™. And there was this guy, his name was "The Penguin." And, some folks may remember who he is. He wrote an article in the *Runner's World*. It was for the Team In Training dinner the night before.

I remember him standing up at the podium and talking about like, "Hey, you guys are out here to accomplish a goal. And you're here to do something big. And you've trained, and you've worked, and you've done something big. Now, out there, tomorrow morning, there will be these runners who just knock it out in under three hours. They're fast. They didn't even have to train as hard. They may not even be paying attention. But just so that you know, they're not like us."

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It was like a... “They're just different. They're just different from the people who are accomplishing the task in this room.” So yeah, there are, absolutely, lawyers who can build fantastic practices without ever having to have a coach. And they might listen to the podcast, take it, make freaking notes, and they're gone. And, they've got it.

But for a solo, they're not like us sometimes. And, you need that extra support. And that's sort of what I found in this group, which is what we were talking about that led to this podcast. I get it that I'm not like that, that I need the group. I need the accountability. I need, if I miss a meeting because of something, someone in the group will be like, “Hey, you good?” And that's all, and I can be like, yes, and then everything's good.

But they know because we're used to accountability. But providing that, just organically.

Melissa: Yeah, that's so true. I don't think this is what you meant to convey, I just want to make sure that it's clear, it's not all solos in the group. There's people with teams. Yeah, it's like the gamut. Which is actually, really healthy, I think, to not just have this echo chamber, of like a certain... I want all of it. I want people who they just lifted a business off the ground, and they've got a sustainable business, and they're plugging in. And/or the people who have developed a team, and are struggling with some of those issues. There's so much value to go around and so, so good.

Mitchell: Regardless how big or small your firm is, Rome wasn't built in a day. I might be building my first monument; you might be tearing down your eighth. But we're all still going through that same process.

Melissa: Yes. I love the way you said that. So, what are your Rocks? You want to share them?

Mitchell: I'll share one that I've been working on, that I'm really excited about. Over the time we've gone through, and I create these Rocks and develop it, and I keep coming back to the business process redesign brain.

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The thing that, you know, how do I do the consulting side? Kind of really look at this.

Melissa: Can I stop you, real quick? Will you share, just in your own language, what is a Rock to you? Like, how do you think about a Rock?

Mitchell: So, I've been around *Velocity Work* enough to know that there's great debate over the term "Rock," and how it applies. But the best example of the Rock, that I always keep understanding to come back to, is the professor, years ago, who held a cylinder and said, "Put the rock, the sand, the pebbles, and all those into place at the same time. And you learn that if you start with those big rocks first, you can fit it all in. If you start with the sand or the pebbles, the little things that feel important, you can't get those big important things into the cylinder."

Melissa: Yeah, so every quarter, we set new Rocks. So, it's like your key quarterly priorities, that you're on the hook for. That's where the accountability comes in, is for Rock accountability.

Mitchell: It's the big firm task, that if I move it to the front of the line, it helps me organize everything else around it. Then, I can accomplish the goal.

Melissa: And yes, so you can get to the goal, which is the number. Yeah. Okay, so one of your Rocks, what's it called? Do you know, off the top of your head? We make them name these very specifically. That's why, to the listeners, that's why I'm asking if he knows what it is, right now.

Mitchell: The Rock is to develop a program of tech competency for law firms. And underneath that, one has been to have two presentations; one of which I've already given. And otherwise, also to produce a certain number of YouTube® videos that relate to that presentation. To help lawyers be better at technology within their practice.

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Melissa: Cool. Yeah, I bet you're really perfectly suited for this. Because of your background with consulting, plus being a lawyer, having your own practice.

Mitchell: It's something that I keep finding my brain leaning to. It's something that I actually enjoy. I serve on the computer and technology section for the State Bar. That's the chair that I'm in. So, it's not just a deviation from my daily work; that's something that I've taken on.

Melissa: Can you explain to everybody like, how does this tie in? I'm thinking, because you have goals for the firm, that are numbers. And this is one of the priorities that you said, "This. This is something that I am prioritizing, so that my firm gets to what I want it to be. So that that goal is inevitable," basically. How does this help you, as the owner of the firm, with the firm?

Mitchell: As a solo, or as a firm owner, even though I have virtual assistants and folks helping, what I find I keep coming into is the friction of getting work out. And how can I reduce that friction using technology? I was listening to the recent podcast from Clio®, and everyone's talking about delegation, delegation. And in my mind, I'm screaming; but what can you automate? Like, that didn't hit the board.

And I kept talking about, what can I give to other people? And how can I give it to them in a way that they know what I want, when I want it? This is a way for a solo or a large firm to delegate it to the technology. So, it's always what you want when you want it, in a way that's really easy to do; with reducing the friction to getting tasks accomplished.

Melissa: That's so interesting. I should do an episode someday with people on automation, not delegation. That'd be really cool. Okay, so yeah, and I love the word "friction" that you used. Before we pushed record, you were mentioning, the language you used that I really liked was the "non-value", like, client value services; it's helped with everything but that. I don't know. So, say what you want to say about that.

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Mitchell: Well, I had a paralegal that I was working with and in the job description it said, you know, let's do processes and things. And I was working with her to try and automate some letters going out, or some notices going out. And she came to me, and she's like, "Wait a minute, like, this is a staff job, or this is a paralegal job. Are you trying to automate that?" I said, "Yes. I'm trying to get things as easy as possible, that do not add value to the client, to be done without any sort of input and time."

So, sending a letter. I've got a form letter that every lawyer has, who's done litigation; here's how to prepare for your deposition. How can I make sure that goes out automatically, without having to depend on somebody? It's not a billable task, so either I'm doing it and I'm eating the cost, or I've got a paralegal doing it and I'm paying the cost, but then eating it from the client.

Because it's not value add. But it's something that we can get out easily, and automate, and get out the door. Simple things. One of the things I do sometimes, when I'm working, I'll turn on some of the local court hearings, and I'll listen to some of the attorneys as they're preparing their motions, just so I can keep up with where people are going sideways.

Calendaring, something that should be the most automated thing in the world. Lawyers on bended knee trying to get permission to file late file pleadings, because they missed the calendar. Or, one lawyer, who was aggressively trying to argue to let them present evidence of attorney's fees during the trial, because they just missed the time to say that they needed to have an expert on attorney's fees. Block and tackle stuff.

I get that people miss it. But watching, those are the things that I think, "That should be automated and get out the door, to protect your client."

Melissa: Yeah, yeah. 100%. Okay, so I'm assuming you've read like, the Lean books, *Lean Startup*, Lean methodology. Are you familiar with that, or no?

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Mitchell: I know the methodology and I've read the website articles. I have not read the book.

Melissa: Oh, that's fine. I mean, everybody knows, I've barely, I don't finish any books. I mean, I start a bunch and I get stuff from them, but I don't finish them. So, lean methodology, you're just using a lot of language that I learned from that, from learning about that. And, gosh, there's such a deep appreciation I have for the concept of it.

That's what you're digging into. Is how to be “lean”, using that branded language, how to be lean behind the scenes with everything that is not a value add. And so, that you can reduce the resources, and time, and effort that is spent on everything that doesn't generate value.

Well, it generates value, but you know what I mean. It's not what people are paying for. It's everything that people aren't paying for, that you're trying to get streamlined well, is that correct?

Mitchell: Yeah. I understand why firms do, but this isn't something that the client will find value in. It's almost like charging them to send them the bill. You just can't do that. But I was meeting with another member of our group, because we share resources, and building out a phased, deliverable-related approach to each phase of the litigation, from opening the file to securing the judgment.

And this was one of his Rocks and so I said, “I think I've got some examples.” I was sharing it with him. And he said, “Mitch, there's nothing like this, that I found at all googling it.” I'm sure someone will have something, but it's not easy to find.

The template that I was using was from the late 90's in consulting world, for software implementation. Yeah, like lawyers are a little bit behind this. But this has existed for 25 years. We just haven't brought the process in. And then, you get lawyers on bended knee, trying to get attorney's fees to be argued, because they just didn't have that checklist.

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Melissa: Yeah. So, I remember, because I think this ties in, I remember you talking to, I think, just consultatively. Like that you were just trying to navigate and figure out if there's a service out there that could really help do what you wanted it to do with your software. There's a company you talked to, and you're like; no, I just want X. And, they didn't do that, couldn't do that, I don't remember. Go ahead.

Mitchell: I have been lovingly fired by a number of the consultants that I've been working with, because there are really good consultants out there, who are really good at implementing Clio or implementing process. But I would come to them and say, "Great, give me the starter pack. Give me what you did for the last lawyer who's just like me." And then, we can optimize and benefit from them.

Their process, I understand it, it's not wrong, is to say, let me analyze what you do. First, let's talk about it. And one example I gave a long time ago, when we were talking about this; my mom, when she was driving around a lot more, used to park in like the very last parking space in the parking lot.

And I would talk with her, "No, move your... Here's how to find a closer parking space." And she's like, "Mitch, I can't find my car if I don't park in the very last parking spot." I'm like, "Yeah, but you are burning so much energy to get through all those empty spaces." But that's what you know.

A lot of times when consultants come in, they're saying, "Tell us where you like to park." And so, they're building their process off the last spot in the parking lot. I'm trying to flip that on its head and say, "Start me off with what's best practice. Bring me into; if I were to shut the firm today and go and join somebody tomorrow, I'd be billing in three days because I would adopt their practices. So as a solo, where can I find that?"

That's sort of what I'm trying to build out in the channel that I'm going to put out. I am not going to compete with the really smart, deep work that the other consultants are doing. But I'm going to give people a place to start before they get there.

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Melissa: Hmm. I love that. Yeah, tell people what you're building with this Rock.

Mitchell: So, I've done this presentation for the Austin Bar. The first week of December, the computer and technology section is having a full day conference here in Austin. Myself and another lawyer, are doing a tech bootcamp. I'm changing up, not a survey of what is, but starting with, this is what I have, and this is how it works.

So, telling people, "Yes, there are 1,000 tools out there, but these are the ones that I use, and this is the tech stack to use. Along with that, we've got a YouTube channel that we're building out. To try and say, well now, you know what to use, this is how we use them. Everything from macros and Microsoft Word™ or styles, or ways to tie in Faster Law® to Clio.

Things like that, that will help people optimize their ground level practice. We're going to be putting those out online, so people can kind of learn, from the first start, how to compete with the bigger firms that have ten staff doing these kinds of programs.

Melissa: Okay. So, I'm going to, with your permission, make it available to people in the podcast notes. You want to share it with people, right? Not just for these presentations, and...

Mitchell: No, absolutely. The presentation is a member benefit for people who are part of the computer and technology section. So, the all-day workshop, people can look it up, I think is December 2nd. But no, this is something that we're happy to share and get out there. And I've had other lawyers, who saw the Austin bar presentation, say, "I was tech savvy, but I never knew about that."

So, trying to get stuff out there to share it, just because this is something that I like doing. It's the hat that I wear for the section, but it's also something that I'm just trying to scratch that itch, of things that I enjoy building.

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Melissa: Mitch, I know I'm putting the cart before the horse here. But I really think this is like, your next business. If you have any desire to start another business, I think this can be really valuable for people. And you were on the hunt for it, for so long. And you know, you're talking to other Mastery Group members, and they're like; there's nothing out there like this. This is really useful.

I think it's that word "useful." If you could find a way to be useful to people, and you can build on that, I really think you've got something here. Especially with your knowledge set, your experience, your everything that could be, this could be the next thing. I don't even know if you want that. But...

Mitchell: I love doing it. This is something that I've talked with my paralegal on it, when I was working with her. And she's like; wow, you just spent the last hour rebuilding your styles and your macros. And, I said yeah. It's not as nerdy as it sounds, I just do like doing it. And thinking through the problem set, as I'm getting other things out the door.

If someone says I need a contract, I will build the contract. But I'll also put in the variables. So, that Clio can do document automation with it.

Melissa: Yeah, I love that. It's practice technology competency. That's what I had written down at the top of the hour. Yeah. Yeah. This is so great. What else can you share with us, Mitchell Zoll?

Mitchell: That's one of my big Rocks, that I'm working on this quarter, to get out. I sat through the quarterly planning that we do, which is, it's so accessible and so difficult at the same time. Because these are all basic numbers and basic structure; that we all have clients and revenue and things.

Those are usually good reminders of things that I need to keep building, more than things that I have built. It's all a journey. Progress versus

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perfection. But those are the things that I'm working on to connect those dots.

Melissa: Cool. That's so great. Thanks for coming on, Mitch.

Mitchell: I enjoyed it. I always hear people say that, and I can admit, now being on this side of the microphone, for those who are driving around the Starbucks® line. Yeah, this is a lot of fun to do.

Melissa: It was. It was a blast to talk to you for a bit. I love it. Mitch, if anybody wants to engage more with you, or just this kind of information, where should they go?

Mitchell: The easiest thing, if you're in Texas and interested in the State Bar's computer and technology section, which is everything from practice technology to NFT's and blockchain law. Go to SBOT.org.

It's gonna be State Bar of Texas technology section. There, you'll find information about the December CLE, but also Tech Bytes™, and other information that helps people in their practice technology.

Melissa: Okay, that's amazing. If they're not from Texas and they wanted to get in touch with you, should they go to your firm website?

Mitchell: You're always welcome to go through my firm website. Just fill out, in the contact form, why you're reaching out because I get a lot of spam there. There's a contact page on that. It's just ZollFirm.com; Z-O-L-L-F-I-R-M.com

Melissa: Okay, perfect. And then, I will get the YouTube channel URL and put it in the show notes, as well.

Mitchell: That'd be great.

Melissa: Thank you for coming on.

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Mitchell: Thanks for having me.

Melissa: Bye, bye.

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