

**#189: Automation, Delegation and Growth:
A Conversation with Mastery Group Member
Bobby Botnick**



Full Episode Transcript

With Your Host

Melissa Shanahan

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

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: All right, everyone, welcome to this week's episode. I see your name says Robert Botnick. I always call you Bobby Botnick. Bobby's fine?

Bobby Botnick: Bobby is absolutely fine. Absolutely.

Melissa: So, Bobby. I was pretty thrilled that he was willing to come on and share some of his story. Because I've known him for about, we just discovered, it's about a year and a half, a little bit over that now. And I so enjoy working with you. So I was really excited that you wanted to come on to share lessons learned, realizations that you've had through the work that you've been doing. So first, I guess, how about you introduce yourself and your firm, where you are.

Bobby: Sure, I can do all that. It's great to be on the podcast. Thank you, Melissa. I'm Bobby Botnick. I have the Botnick Law Firm. I founded it in January 2012. Before that, I was a prosecutor. And so I was a felony prosecutor for about seven years. I left the prosecutor's office, and I became a criminal defense attorney.

And so focusing on felonies, misdemeanors, DUIs, traffic tickets, and that's what we do. Up until about a year and a half ago, I was a true solo, doing everything all by myself. And then, in the past year and a half, I added my wife, who's also an attorney. She joined me as a partner. And then we also brought on a legal assistant last June. She's been with us now for coming up on seven months.

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

We're in Cleveland, Ohio, or Shaker Heights, Ohio, Cuyahoga County. So we cover all traffic and criminal matters throughout Northeast Ohio. That's a little bit about us.

Melissa: I can't believe you've had the legal assistant is June.

Bobby: I can't believe it either.

Melissa: Time's flown since you... I mean, you needed her about a year before you had her.

Bobby: Oh, that is for sure. And you kept encouraging me. I just need to hire somebody already. "When are you doing it already?"

Melissa: Encouraging or pestering, I don't know.

Bobby: Thank goodness, I did.

Melissa: Can you imagine life without that person now?

Bobby: No, not now. And I gotta tell you, when she takes time off or she's out sick, I'm dying. It's like going back to the Stone Ages. And it's just like, oh, my God, I need her so badly. So it's really funny. That once you start, you know, delegating responsibilities, it's like, oh, my gosh, I have to go back and do it myself?

Melissa: Yeah. Well, there are a few talking points we chatted about that I wanted to cover. I would love it if you would open up and talk about pre-COVID versus now and what you were sharing with me about the difference. Okay, go for it.

Bobby: So as a criminal attorney, and I'll tell you in Velocity Work Mastery Group, we see a lot of attorneys from different paths. And I see more transactional attorneys and not so much in litigation. And as a litigator, you know, I was a true solo. So what I was looking at were just other solo

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

attorneys. Other, you know, criminal attorneys kind of going from court to court and just doing their thing.

It didn't really appear that anybody had a business or ran a law firm, they were just a lawyer. And so that's what I was doing. And so pretty much from when I started in 2012, up until very early 2020, I didn't have any true goals. I didn't have my sights set on anything.

Really, it was just a matter of who's gonna hire me. Can I answer the phone, you know, quicker than somebody else? How are people finding me? And the real only goal was, can I make more money than I did the year before? And that pretty much worked. But it was really just a lot of hope.

You know, there wasn't anything in place to say how I was going to do it. It was really just, you know, trying different things, trying different online fads or something like that. And then, before we knew it, COVID happened, and the world shut down. People weren't getting arrested. People weren't getting traffic tickets. DUIs weren't happening because the bars were closed.

And so that was really just a time for a lot of reflection about what I was doing, how I was running my firm; which really was just me. And what I needed to do to try and move myself forward. Really just to sit, take a break, evaluate, and see what I needed to do for advancing myself and the firm.

Melissa: I wish I had your revenue, year over year, from 2012 all the way till now, just to see the percentage increase. Because you said, the goal was just to beat what you did the year before. I'm wondering how much did you beat it by typically?

Bobby: Typically, it was maybe 2,000 to 5,000, 10,000.

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

Melissa: Oh gosh. I thought you were gonna say percent.

Bobby: No. I mean, the percentage was like next to nothing. It was a lot of assigned counsel work. So getting paid like pennies on the dollar practically for what my actual fee was, and just really relying on the courts for a lot of that. And I remember, I think it was maybe five years or so into private practice, and watching it tip from the retained earnings versus the court-appointed earnings. And I was like, "Oh, this works. I like it when people actually hire me and pay me." And now we're almost entirely out of the court-appointed cases.

Melissa: Yeah. Which was a really deliberate decision by you. I remember that.

Bobby: Yeah. Yeah. We talked about that last year. Just how do we get rid of all that? And at this point, we're just about all wrapped up with our state court-appointed cases. And we're only taking federal court-appointed cases.

Melissa: Nice. Okay, to finish that growth thing, though. You told me before we started, since COVID, you have 3X your annual revenue. That is insane.

Bobby: That's true, yeah. I don't know how all of that happened. Other than, you know, we harnessed technology. We learned about systems. We looked to see what other people were doing around the country. And then I think a lot of it had to do with meeting you and figuring out how to take a look at the firm, looking at what our numbers were.

And the numbers aren't just dollars, but it's, you know, how many cases are we handling? What types of cases? You know, how many new clients do we have? We were looking at all those different things so that way we can figure out, do we need more of a certain type of case? Do we want less because we have too many? How do we try to diversify more?

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

And that's really helped us tremendously. And so, without having the ability to sit down and go over those things, I was clueless; I was just kind of going with my gut. And one of the things that we talk about are facts, not feelings. And there's no doubt I was going off of feelings forever.

And it was really sitting down and working with you to figure out, well, what are the facts? And that was the major eye-opener, really, to be able to sit down and figure out, okay, what have I done? What am I doing right now? And what needs to be done?

And to be able to keep track of all those things? I mean, I'm a numbers guy. I'm not afraid of math. And to be able to have access to all that information, to data, to help guide us and steer the ship, that's incredible.

Melissa: That's so good. I mean, what was coming to mind... Well, two things. I said that you mentioned your 3X revenues since COVID. And you said, "I don't know how all that happened." But in my head, what I was thinking was, I know exactly how it happened. You got really intentional.

I mean, because you were talking about, you know, we learned about new technologies. And I can't remember exactly what you said. But the reason you did all that was because you got very intentional about making some decisions, constraining down to what you were going to focus on, getting those things done. It feels like such a mess sometimes when you're in it. But, bird's eye view, if you could look at intentionality, pre-, and post-COVID, if that's the line, I bet yours was exponentially increased.

Bobby: Maybe I play things down. Maybe I'm too, you know, humble or something like that. But that's exactly what I did. You know, I was introduced to Calendly. Which is like, okay, what's that? Oh, just for scheduling? Okay. And that's really what opened the door.

So it was looking at Calendly, it was looking at RingCentral for my phones and messaging, it was taking online payments. And then going with a case

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

management software, to be able to automate documents and sending out contracts and invoices, and ultimately being able to track all of those things.

Once it got to a point where I wasn't doing everything myself, but I had help, I was able to do a lot more. I kept hearing, you know, once you bring on employees, once the business begins to grow, the revenue will grow too. I didn't believe it. It's exactly what happened. Yeah, even having an answering service before having an assistant. That helped.

Melissa: I will say, though, I want to toot your horn because you were, again, really intentional. I don't know how much of what you just said about, you know, Calendly and then RingCentral, I don't know how much that came out of strategic planning. You decide that's what you're gonna focus on, and you do it. Or, if it was just a side thing that you decided you were going to do.

But I will say, I think people are either on one side of the fence or the other, one end of the spectrum or the other, where they don't hire because they don't really understand or believe fully that it's an investment. And if they spend this, they should expect a return. So there's that. But on the other end, people just spend out of desperation, and they don't know their numbers. And so that's kind of messy, too.

You really did a good job of, again, being intentional and looking at the numbers and saying, okay, this is what it's going to cost the firm to have this person fill this position here. And if that person fills the position here, this is what I think... I don't know if you entirely believed it, as you were just saying. But you had some measure in your mind of what that would mean for the business if that person were able to come in.

So you were pretty organized about it. And going on facts, not feelings, as much as you possibly could before you made the hire. I don't know if it feels that way to you. But from the outside looking in and watching you move through some of that process, you did a good job of just staying

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

intentional. Not making decisions on a whim or being paralyzed and not being willing to make a decision because you just weren't willing to do the math.

Bobby: So I'll tell you, I was definitely willing. I was scared. I mean, I was really nervous because I was aware of what the past was. And I didn't want to, you know, find myself in a situation of the revenue that I had in 2012 and 2013. And, quite frankly, I don't think we're going back there ever again. But it's still nerve-racking to bring on somebody else. Even the thought of now you have to pay them and taxes and all these different things. It really was a major growing pain of all these different things, from just being you to now being responsible for others and doing things properly. And, yeah, it's nerve-racking.

As we're continuing to grow, at least I know now, okay, there are two other people that the law firm is now taking care of, it's not just me. And to be able to continue doing what we've been doing, I know that it works. And I know that there's the revenue that's coming in and the system's set up. So that way, things can be, you know, taken care of.

We're working with a great financial strategist right now to figure out all those different things. And again, that is intentional. Because I know that it's a 'who' not 'how'. I know that I can't do it. And that's why I have to bring on all these experts. So that way, they can help me figure out how to do these things. Yeah, so that's great.

Melissa: That's really great. Okay, so the other thing that I thought of as you were talking about your path and now you're making three times more in terms of revenue. Everybody listening to this podcast knows that doesn't mean necessarily three times more in your pocket, though it could. So I don't want to just jump to that.

But I will say, it gives me goosebumps and just gets me giddy to know that that is happening for you because you deserve it. You've been working

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

diligently and focusing on yourself as the business owner. And my assumption is that the people I get to work with are good lawyers. So there's that assumption for me.

But bettering yourself as a business owner is the key to freedom, it's not bettering your lawyer skills. And so I watch you and others go through this process. And I just love it when the momentum starts. It takes a bit to right the ship and to get your groove as an owner, and your cadence, and how you're going to think about things, and how you're going to look at things. I'm just so happy for you. And this is just the beginning, Bobby, it's just the beginning.

Bobby: And I'll tell you, with part of my background, you know, other than law, I come from a long line of people in retail. And so my dad has a business, a family business, and he took it over from his father. And so, even though I'm not in the family business, I'm running a business. And trying to look at what he's done and how he's worked with his customers. And now I'm running a business.

And that's what they don't teach you in law school. So I had to learn; how do you run a business? How are you an entrepreneur? Yeah, I was picking up books and audiobooks and all that stuff. I mean, one of the things that I had to do in bringing on Abby as my partner... You know, she was working at a law firm, and I needed help.

So one of the things that I told her was, "Listen, I will pay you what you're making at your firm. Just you come on over." I've been able to do that and keep going. That was one of the things where I knew I had to do that. What's been great is, you know, the concerns of, is there going to be enough cases coming in? Will there be enough revenue to cover everything?

Yes, there was. It was because I had somebody else who was helping me. Who was able to do all this work to take things off of my plate. Now that

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

we've been working together, I can actually set goals. Nobody ever really asked me, what do you want? Nobody ever asked me that. I mean, I want to be happy. I want to have a loving family. But beyond that, you know, what do you want?

You really forced me to sit down and take a look at what did I want. And now that I have a better sense of those things, that's that drive. It's like, all right, how are we going to do these things? How are we going to achieve them? It's just knowing you got to have a team in order to do that. So I'm working on that. It's really exciting. I gotta tell you.

I'm really excited because you're absolutely right. I'm in my mid-40s. I know I've got a long road ahead of me. The sky's the limit, as far as I'm concerned.

Melissa: Yeah, exactly. I mean, if you had to start all over, I don't think that's not going to happen. But if you had to start all over, how quickly you could turn the dial up on the business versus before. And it's really just about you developing your own brain and your own abilities, exposing yourself to certain things, and gaining the capacity as a human to handle all the business.

Yes, I do think it's just the beginning. That's exciting because, you know, the sky's the limit. And then also, you've given yourself the ability because of the things you've put yourself through this last year and a half, at least that I've seen.

Now, if, for some reason, you needed to start all over again, you could do it pretty quickly. You would do it, and you would do it faster and better than you did the first time. And not just because you have generalized experience, it's because you have been putting your head down and figuring out the work that actually turns the dial. It's just cool.

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

Bobby: I banged my head a lot the first seven years or so. And things just didn't work. But it's because I had no strategy. It was just; I'll try that. I'll try this. Oh, that looks good. Yeah, why not? And not really putting any real thought into it. You know, what dials are those going to turn? What difference is that going to make?

Melissa: Yeah. Well, okay. We're going to touch on a few things. One that you seem most excited about. I think we should start here. You had a Rock; I think it was Q4. You had a Q4 Rock of 2022 around case updates. So if you could say what the Rock was.

For any of you who are listening but don't know what a Rock is, it's essentially a quarterly priority that each member identifies for themselves. They usually have somewhere between three and six, on the high end, and their priorities. And that's the effort that you're going to put forth in order to be on track for where it is that you want to be.

One of the priorities that Bobby identified was around the ability to have case status updates. But I'll let you say more about it.

Bobby: Okay, thanks. It was to implement a case update system. And essentially, I'm the one who's going to court. This time, I'm the only one in the office who goes to court. So going to court, what happened in court? That way, we can relate information back to the office, so everybody else knows what's going on with the case. What's the status?

And if the client wasn't at court, if they weren't at that hearing, how do we let them know what happened? What was discussed with the prosecutor? What's the judge saying? All those different things. Maybe I don't get to see somebody by the time I get back to the office, maybe it's the next day, and things just get lost.

It was creating a lot of frustration back at the office. So there had to be some way. And the initial thought was just to send a text message. And the

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

problem is that... Abby is my partner, is my wife. I'm sending her text messages. But now the text message is also mixed in with, "You need to pick up the kids. Don't forget about your target run." Now it's all mixed in together, and that's ugly. We didn't want that.

At the same time, there's the phone system. But she's not always looking at that because a lot of the time, she's working remotely. What can we do? What made sense? And so I started looking into different technology that was out there. What could work? Whatever is out there that we could try and use.

Ultimately, it just needed to be simple, right? Is it K-I-S-S? And so it was creating a Google form that was then connected to a Google sheet. And so now I have the form installed on my laptop, it's on my tablet, it's on my phone. So that way, as soon as I'm done with my pre-trial hearing, or sentencing, or whatever it might be, I'm able to hop right in there.

It's all in there. It's now saved into the sheet. Abby, or whoever's gonna take that over from her, is now able to pull up the sheet; it's all right there: what just happened and some of the different details about the case. And then all of that information can then be input into our case management software so that way everybody on the team knows what happened.

And then also, there are tasks that get created for contacting the client; whether it's letting the client know we have a new court date, maybe it's following up with the family to let them know, maybe it's just to say, here's what was discussed at the hearing, here's how much the fines and court costs are; whatever it might be.

But now it can all go into a central system. Where before, everything was really just relying on whatever was stuck in my head. And hopefully, somebody would catch me. But now that we've created the system, it's just taken all that out of my head. Now it's shared with the whole team. And it's in a documented system, so that way, it can always be viewed.

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

That was huge. That was a huge game-changer. And it was something I was able to do. I didn't have to hire somebody to design it. It was really just a matter of doing some Google searches and putting it together. I figured it out. And what a game changer.

I am able to do my three updates from today's three hearings. And that's great. It's great because now, you know, the team isn't frustrated with me. I'm not frustrated because they're frustrated at me. It just makes life easier and smoother. And the way that I have it set up, or whoever does come in next, all we have to do is to add them on as another attorney, so that way we know who it was who handled the case. And these little things are such a game-changer.

Melissa: Yeah. Oh, that's so good.

Bobby: It felt really good to be able to kind of check off accomplishing that Rock. And it really is about, you know, by setting this Rock, how is that going to help advance the firm? It's because we're going to be more streamlined, we're going to be more efficient. And by having a system in place, other people can step in and now use that same system to get word back to the team. That was really cool.

Melissa: The peace of mind that must create for you. I mean, certainly, the clients win because things can be more organized internally, and you're communicating with them if you need to, etc. Your team wins because it's more streamlined inside the firm, and the company's winning too. But for you as the owner, just the peace of mind that you probably have. You're not always wondering, is there something you forgetting? Did you need to tell somebody something? It's just gone. You don't have to have the bandwidth for that anymore.

Bobby: And now I can just hit the little dictate button on the phone, and I can just speak it right into the phone, and boom, it's done. Submit. Done.

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

Melissa: It's so good. I love it. Okay, another thing... For listeners, you may hear me have a few more members on in the future. And I asked anybody who's willing to share lessons learned and realizations, to come on. So that's kind of some of the things that, as Bobby was reflecting, that was one of the big things that stood out in terms of accomplishments, lessons learned, realizations, that you wanted to share.

Another one that you said, like, we could definitely talk about delegation. So I'd love to hear lessons learned or realizations you had around delegation and some wins that you've had. So you can just start speaking about the topic if you want.

Bobby: I did everything myself, right? I had to do all the consultations. I had to gather all the information. I had to send out the contract. I had to schedule the time when, you know, a client would show up to make a payment. I don't have to do all those things myself anymore. I have team members who can take those things off of my plate.

Now I have an assistant who, if somebody calls us or they submit a form that they want to talk to an attorney, she's able to talk with them, gather more information. And you know, when I offer a free 15-minute consultation, I have everything I need ready to go. So that way, I can say, "I'm happy we can handle these cases. And I understand these are things we're looking at. Here's what's going to cost." But now I also already have their email, their address, the case number, the judge, the court, all of it.

To send a contract, either I can do that, or I can have somebody else on the team send out the electronic contract, it's a DocuSign. And that whole process just frees me up so much. Doing one consultation, which used to be anywhere from a half hour to an hour of my time, now it's probably closer to 15 to 20 minutes. And so that's really been huge.

Sometimes we send out a contract, and we don't hear back from a person right away. Maybe they're still looking at the contract. Maybe it ended up in

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

the spam folder. And so by delegating the task of following up with them to make sure: Did you get it? Do you have any questions? That helps out tremendously, as well.

Probably the biggest part that helps with the revenue is we set up payment plans, we offer payment plans as an option to clients. And now I have somebody else who gets to be the bad cop to say, "Hey, you know, you're behind on your payment. If you don't make it, we can't continue to represent you." That has helped tremendously. That's been really great, too.

All these things that I would have to try and do myself. Sometimes maybe I didn't want to deal with the confrontation of somebody that I'm representing in court, "And by the way, you still owe us money." A lot of times, I would just say, I'll just finish out the case. And there are thousands, tens of thousands of dollars out there just left on the table. And that's not fair to me. It's not fair to my family. So we're doing something about it. And we made some really big changes with that. So that's, that's huge.

Melissa: That is. One question I have around the topic of delegation is, as I was listening to you share some of that, it seems like people know that that can be true or that that is true. And even if they're further along in delegation, it's like, having the knowledge about something, but actually doing it are two different things.

So when you think about how you started to transfer responsibility to someone else for certain things, for you what does that journey like? And I don't know if barriers come to mind that you had to navigate. Or if you have a process now for how you delegate. I don't know, but can you speak about how you made the transition?

Bobby: The first thing was, what am I supposed to delegate? Because I do everything? Right? What am I going to have that person do? And that seemed like a really foreign concept to me; because I'm going to hire

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

somebody, and they do what? I just couldn't figure it out. So I really just had to begin that process.

For instance, with Abby, my partner, going through the types of cases that we handle. What all is involved in how we get copies of police reports? What is it that we're looking for in those police reports or body camera footage? To sit down and go through those with her so that way, she could see those things.

And now, she's really doing all of the discovery review, and then writing up summaries for me. That way, it's saving all that time for me, so I can be doing other things. That was a gradual process. I mean, that certainly took months. But to finally achieve that was really great.

To be able to delegate answering the phones. To go from doing it myself to having an answering service to having somebody live in the office. Having to sit and kind of go over those things. Creating a script. Having somebody listen to my calls and listening to her taking calls.

And then, you know, maybe not enough information is being gathered. So what do we need to do? We need to go back and kind of revise it. And we really need to be gathering these items, too. And the same thing when we have a new intake, a new lead; to gather all that additional information.

It's just finding out that your work can make my life easier. What's going to save me time? Trying to think about what are those little things, what are the things that I don't have to be the person doing that? Somebody else can be doing it, and that's going to then help me.

I'm still figuring it out. There are still times I get hung up. You know, I get excited when I see mail come in. But I also understand that I shouldn't be the one opening the mail. That's really a task for somebody else.

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

Melissa: A follow-up question I have to that especially is, you are in court a lot. And so that drives your schedule in many respects. And you are good at, I think, being intentional with time that you aren't in court. And taking control where you do have control. And I know it's not perfect, nobody is, but when you think about training and delegating and handing things off.

And getting people up to speed to where you are comfortable with them having that on their own, do you schedule time on the calendar to meet and train? Or are you more fly by the seat of your pants? "Hey, I have a minute. Let me show you something." I'm sure it feels messy. But I'm wondering how messy it is. With the evolution that you've had so far, is it pretty organized and dialed in? "This is when we're going to allocate time to learn X." Or, no?

Bobby: It's a hybrid. So let's start off with the messy, let's definitely put that one out there. When your first hire is your spouse, you can say, "I can work after 4:30." We have evenings, after the kids go to bed. Or a weekend. Dinner training: everybody loves that. There's no separation between work and your free time. So I started out doing it that way.

But then, when it came time for a non-family member, I had to set that time in the schedule. Really, when our assistant was going to be starting, and we knew what her start date was, we specifically had to set a time on the calendar to just work with her. To make sure that she understood, and to show the different systems, and making sure that she understood how the phone system work, and the case management software, and things like that. So we did have to do that.

And then there'll be situations where I'm taking a phone call, and I'd have her come on in and sit in with me, so she could hear. But then also explaining why things are done in certain ways. Obviously, she's not practicing law. But to understand why we need to be able to explain certain things to clients. Why we have to have these different conversations.

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

The importance of, now that we've received a notice from the court about an upcoming hearing, we have to look at the calendar. What's on the calendar? Do we need to push it? Do we need to reschedule? Do we need to file a motion? Talking about all those different things.

And so a lot of that is on the fly. But certainly, right at the beginning, that was very consciously scheduled. And I had to make sure that I had that free space in my schedule to be able to do that. So it's one of the reasons why when she started, her start date was a Wednesday. So that way, I had a lot of extra time, on Thursday and Friday, to be able to dedicate to that because I wasn't going to be in court as long.

Melissa: I do remember when you knew you needed to hire an assistant, but you hadn't done it yet. I remember there being this sense for yourself and for Abby that you had to have things very dialed for that person to walk into. And I'm curious how that turned out. Because I remember looking back, I hope that it didn't seem like I was too insensitive. Because you really were on a learning curve. And I was like, "Stop waiting. Just hire the person."

Bobby: And so, I think that's where you have conflicting personalities. Right? Yeah. I mean, you know, the good news is, you know, Abby and I, we're not the same person. We have similar philosophies, but they're definitely different. I'm more open to the risk. And so for Abby, she loves her systems, and that's been great for me.

But she wanted to be able to have everything documented, ready to go, so that we could plop somebody down and say, all right, now you're good. And there are still plenty of things that we don't have documented. And so, I don't know that we needed to wait as long as we did and have everything documented the way that it was.

And certainly, moving forward, I'm not waiting to have everything documented. Because, for the most part, what we realized was we need

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

this person, we need this person now. And whether it was Antoinette or anybody else, we needed that body; we needed that person to really help.

And I think for that next hire, which is going to be the associate, it needs to be, you know, the right person. But there'll be that time period whether they're following me at court to see how I'm doing things, or just being back at the office, and "This is how we do it. And here's why."

But then, for a lot of it, it's really just letting them go and see how it goes. And when we pick up on little things here and there, then we can really focus on that and say, "Alright, here's what needs to be done," and we'll make those fine tunings. And listen, it's seven months later, and we're still doing that with our assistant, and that's okay.

Melissa: Oh, definitely. I mean, I think, truly, I don't know anyone who really has had it all dialed. Certainly, you want to feel a sense of being organized before someone comes in. I definitely agree with that.

From the vantage point that I had, which isn't in the nooks and crannies of your business, what I was hoping I wasn't too insensitive about was it felt like there needed to be a sense of perfection before this person walked in. And I knew that was never going to happen. And now, it really is actually, great to hear you say, "We're still not all the way there."

Because that's exactly how it is; it kind of evolves and morphs. And if it's the right fit, that person can really be helpful with documenting and clarifying and things like that. So I was curious, if next go around, which you just answered, do you think you'll hire more quickly? Making sure, as you said, it's the right person, but not waiting so long to start the hiring process?

Bobby: Yeah, definitely. Now that I've actually gone through the process of hiring somebody, because I never hired somebody before, it's like, okay, this is how it's done. And, you know, I think it was really helpful, just kind of

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

seeing what other attorneys were doing. To try and get some tips and tricks of the trade. Now that I've done that, it's like, okay, it's really just a matter of this different role. We're not going to wait for perfection. That's not going to happen.

Melissa: Okay. Something else. You said you made a list of all the systems that you have and that you use, and it made you smile. It's not all of them.

Bobby: It's definitely not all. But when I was sitting down, kind of looking at a couple of things, I mean, there were at least seven different systems, just to start a case. And I was like, oh, my God. That's a lot of different things that... Again, the person who wasn't being intentional, you just kind of did stuff; I'll do this, and I'll do that.

But once you actually get intentional about it, and you're sitting down and saying, oh, yeah, we need to be able to do this. And then, we have to do that. For instance, how we collect people's information and learn more about their legal needs. What is the system for being able to do that? What needs to be gathered? How are we collecting that? Where's it going? How's that information being conveyed?

How are we scheduling consultations? How's that information going out? How are the reminders, btw? I mean, they haven't even talked to me yet. Right? And all those different systems already. It's just like, when I stop and think about it, it's like, it's mind-blowing. And once they actually become a client, all the different systems that are in place for gathering additional information, learning more about them, and being able to discuss their case, and the court appearances and all that.

I mean, it's really something else. I will tell you, I never knew these things existed. And that was the game-changer in the past year and a half, is that these things can exist, and they should exist. So that way there's consistency and efficiency. That's why we have to have these systems. I'm very happy that I have them now in my life.

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

Melissa: Oh, my gosh, I bet. So that also makes me think, I thought this a couple of times, I might as well just say. Looking back at how far you've come, even though a year from now, looking back at this first year and a half, it was really hard. I think there were times it was a slog for you to really get some momentum. But you kept putting one foot after the other, you stayed intentional. How beautiful the beginning... Because it's the beginning. It's so beautiful, even though it's so hard.

Bobby: I gotta tell you, I think one of the big things for me is seeing my peers. Whether they've been practicing longer, or less time, it doesn't really matter. But seeing what is possible. What other people have been able to achieve in their practices, and saying, "I can do that. Why not? Why not me?"

Just making sure that I surround myself with the right people to achieve those things. To be able to achieve these visions for myself and for my family. It's great, but you're right. I mean, it is a slog to get this thing moving. You got to figure out how are you going to keep yourself on task. How are you going to push yourself? And, I think once you begin to see that this is actually achievable... I'll tell you, just like the growth from '21 to '22, it still amazes me.

Melissa: You know what I saved? You wrote a Facebook post, and I saved it. Probably once every five or six months, I look at it. At the end of 2021, you posted... I think you just slid into your goal number at the end of the year or something, and you posted when you did. And you're like, "I can't believe it!" It makes me so happy to read that because, like, you blew your own mind.

Bobby: I gotta tell you, I did. And I was so excited. I drew on the big Post-it chart; I had the thermometer. And so I had that posted on the back of my door. And I remember a client came in, and I closed the door for a meeting; it was right there. And I was like, oh, please don't turn around. But, I was

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

able to list how many leads we had, how many new cases we had, and then what our revenue was. And it was just like a fundraiser, right? You got to keep filling in the thermometer until you get to the top.

That was so exciting. That was such a great feeling to be able to do that. And again, I never had goals before. There wasn't anything that I was shooting for. And to be able to have these goals and to hit them, to exceed them, was really fantastic.

I know that we talked before this podcast... I was able to hit all but one of my goals for last year. And that's because I got a nice heaping of COVID on Christmas Day. And had that not happened, I'm convinced I would have hit my revenue goal for '22. That's okay. That's all right. We did pretty good. I still blow myself away.

Melissa: So good. I have two questions left. I'm trying to think. I'll end with the more positive one. Okay, so two questions left.

Bobby: It's a real negative, okay, got it.

Melissa: Not real negative. You've come a long way, and the barriers that you did have a year and a half ago, the barriers that you had six months ago, are different from the barriers you have now. So what are your barriers now that you're working to overcome? It's like your new version of your challenges now.

Bobby: The biggest barrier that I have is because of the growth that we've experienced over the past two years. We have a lot of work, which is a wonderful problem to have. And so the biggest issue that I have right now is that there's only one of me. That's why we need to have more bodies, you know, to cover court appearances.

And so that's where my focus is now for 2023. Now that we've gotten to where we are, we have to continue to grow. And so that means, you know,

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

taking a look at our office space. It means taking a look at personnel. How do we advise clients that I'm not necessarily going to be the one who's going to be appearing in court with them?

There are a lot of different things that we have to think about in terms of growing from the law firm that is just the attorney, to the law firm that is now all of the attorneys. That they're not just hiring Bobby Botnick, they're hiring the law firm. And so that's going to be a major focus.

There are a lot of different things that we have to think about, you know, for this year, for next year, of what's going to be the right strategy for doing those things. And so that's the big barrier right now that I have to tackle. Because I know I can't keep operating the way that I am right now. It's just not going to work.

And you know, what's that going to look like by bringing on 1, 2, 3 associates? What's it going to look like to run a law firm but maybe not be practicing the law? That I have other attorneys doing all of that work for me. These are, you know, visions, goals that I have set for myself that I have to keep working towards.

I think now, just having this past year, year and a half, you know, setting Rocks and trying to achieve those Rocks. Now I have a better sense of why it's important to set those necessary Rocks for being able to move the firm forward. And so I think when we're talking about being intentional, to be a lot more intentional about setting those Rocks for myself, because they're really for the firm. So I think that's the big growth that's happening right now.

Melissa: So you are on the hunt for an associate this quarter.

Bobby: Right. And for apparently an associate. We're looking for a paralegal. So that way, a lot of the work that I'm doing can be delegated to somebody else to go to court. And then a lot of work that Abby is doing with

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

discovery can also be delegated to somebody else, and that way, she can focus more on management, and I can focus more on growth.

Melissa: That's so good. So good. Okay. And for the last question, you mentioned that now you have a vision for why you're doing what you're doing and why you want to get to certain goals. I mean, you could share as much as you want. But what does that look like? Or, what is something that would represent, ah, yes, here we go, for your own world, for your own life?

Bobby: So it's not about having things, I don't need a sports car or a garage full of them. They're nice and all. But for me, it's about being able to have experiences, to be with my family, and, you know, start having those ideas. And so when I'm writing down my goals and my vision, it's about being able to spend time with my family.

I want to be able to have that weekend retreat cabin. I want to be able to take my family on vacations. And in fact, last summer, I took my family on a vacation. It was the first one, a real vacation we had taken together; we took the kids to a tropical resort. It was awesome.

I remember seeing the kids playing on the beach together, and I just started getting all teary-eyed. And I'm thinking to myself, "Damn, this is what we're working on in Velocity Work. This is all about, you know, having these visions and setting these goals. And why do we do it? And it's so I can watch my kids having this great time together, literally in paradise."

I was like, okay, so I've been able to achieve this. Let's keep this thing going. I don't have a vision board, but I do get my regular updates from Zillow, letting me know about the different cabins that are coming up on the market. And that lets me know, okay, that's the type of thing that I want to be able to have.

So that way, you know, the family can go there for the weekend or the summer or whatever it is. What's it going to cost me? It's not just like, oh,

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

it'd be great someday. It's what do I need to do in order to achieve this? To take the kids on that on that vacation to the resort? How much did it cost? Okay, now I know.

That way, as I'm setting all of my goals and figuring out what needs to be done and all the different costs, I can figure out, okay, this is what it's going to cost me. And as long as I keep working toward that, so that way I can achieve those, those visions are in sight. They are attainable. It's not just, oh, wouldn't be nice, someday?

No, we're not just working towards someday. This is happening in the next five years. It's not going to happen next week, necessarily, but we're gonna make that thing happen.

Before working with you, I didn't have any of that. It just didn't exist. And so now, I do have this. You talked about a major benefit of working with you and your team, and the podcast and our weekly calls in our strategic planning. It's to realize the things that I want in life, that I want for myself, that I want for my family. And it's an incredible feeling.

Melissa: It makes me think about, you know, I always try to think about why do we do what we do. You know, I geek out on the numbers, and I know the meaning of the group. And certainly, I do know that there's a ripple effect for you guys. In your own world, you have ripple effects from the planning that you do and from honoring the commitments.

But you just put words in my head that I haven't had there, which is just to wake up, like when you woke up to what you really wanted. Then you can work towards something, it just goes faster, and you can streamline yourself towards something specific.

But it's almost like the difference between running towards the horizon, which is like, what is that? We're running to that tree over there with cupcakes on it, like, all right, I could do that. Let's go. And that just gets

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

people to move. I don't know, there's something about making some decisions about what the vision is that you want.

And what does that need to mean for numbers and goals? And the growth of the firm? And in the ways that you want to grow it? It's like waking up to a world that maybe you didn't know existed before, but there's no turning back. That you will never be able to go back and be the person that's like, "Just as long as I get ahead of next year."

Bobby: Yeah, right. And just this idea of dream big, go bigger. You push me to do that. Here's what I thought I could achieve, and here's what I said no to. But when you really push yourself, you can. I've just been amazed. But what I have been able to achieve, either by myself or with a team now, it's really incredible. And that's how I know I'm not going back to the open, "I can do better than I did last year."

Melissa: One more point. Because I know how much your family means to you, what an example you've become for your kids. Being a lawyer, in and of itself, is such a huge accomplishment. So I'm sure that there's, I don't know, I mean, I'm a newer mom. But in my head, there's probably pride when your kids think about, "My dad's a lawyer."

But it's a different thing when they see what you've built and what it takes to build something like that. That's them watching you, you become an example of what's possible to them in a way that you couldn't otherwise. So yeah, it's just really neat, man.

Thanks for coming on the podcast. I love getting to spend time with you. And you're coming in person, so work with you more closely next month. So that's exciting.

Bobby: I'm looking forward to that.

Melissa: Me too. All right. Well, thank you so much, Bobby.

#189: Automation, Delegation and Growth: A Conversation with Mastery Group Member Bobby Botnick

Bobby: Thanks, Melissa. Appreciate it. See you soon.

Hey, you may not know this, but there's a free guide for a process I teach called Monday Map/ Friday Wrap. If you go to velocitywork.com, it's all yours. It's about how to plan your time and honor your plans. So that, week over week, more work that moves the needle is getting done in less time. Go to velocitywork.com to get your free copy.

Thank you for listening to *The Law Firm Owner Podcast*. If you're ready to get clearer on your vision, data, and mindset, then head over to velocitywork.com, where you can plug into Quarterly Strategic Planning with accountability and coaching in between. This is the work that creates *Velocity*.