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Simple Secrets to Reaching the 10-Year Mark

We are proud and grateful to reflect on how we have managed to reach the 10-year anniversary of our boutique law firm as of May 15.

By **Rebecca Rosenberger Smolen and Amy Neifeld Shkedy** | June 24, 2022

Rebecca Rosenberger Smolen, left, and Amy Neifeld Shkedy, right, of Bala Law Group.

We are proud and grateful to reflect on how we have managed to reach the 10-year anniversary of our boutique law firm as of May 15. In prior articles, we have shared some of tidbits gleaned from running our firm and managing our practices, including the initial launch of our firm, our experiences and observations as women in the legal field, certain components we came to see as integral to sustaining a law firm, and the preliminary impact of the pandemic on our law firm's operations. Perhaps the most important thing we have probably learned over the last 10 years is to expect the unexpected and stay nimble and make adjustments as appropriate every single day because we cannot safely predict the future to any significant degree. The good news for us (and our fellow practicing lawyer readers) as attorneys is that the widespread consistent need for our services is certainly the one of the most important contributing factors to our ability to reach the 10-year milestone.

As we start this retrospective, it's noteworthy to remember the 10 focal points for us in our Jan. 3, 2019, article about sustaining a small law firm: communication, respect, triage, budget maintenance, staffing, billing, reliability, clients, conflict management and enjoyment of work. Thinking about those elements, it's clear that these categories must be focal points for all practicing attorneys, whether you might be a solo practitioner, work at a law firm founded by others, or, like us, may be a founding members of a small firm. It's interesting how the further we proceed in our careers, the more it becomes clear that the keys to our staying power seem to be relatively simplistic, reminiscent of the well known book "All I Really Need to Know I Learned in Kindergarten" by Robert Rulghum. Here is that author's core list list:

- Share everything.
- Play fair.
- Don't hit people.
- Put things back where you found them.
- Clean up your own mess.
- Don't take things that aren't yours.
- Say you're sorry when you hurt somebody.
- Wash your hands before you eat.
- Flush.
- Warm cookies and cold milk are good for you.
- Live a balanced life—learn some and drink some and draw some and paint and sing and dance and play and work every day some.
- Take a nap every afternoon.
- When you go out into the world, watch out for traffic, hold hands and stick together.
- Be aware of wonder. Remember the little seed in the Styrofoam cup: The roots go down and the plant goes up and nobody really knows how or why, but we are all like that.
- Goldfish and hamster and white mice and even the little seed in the Styrofoam cup—they all die. So do we.
- And then remember, the Dick-and-Jane books and the first word you learned—the biggest word of all—LOOK.

We can easily frame our retrospective with this simplistic yet poignant overview of what is important in life in general. Yes, in any law firm we do share everything. Whether that's revenue, resources, or our time and expertise. We share with our internal and external colleagues, our clients, the legal community, and the larger community (whether via this column in the Legal, public speaking to educate potential clients or other professionals, or support for community events and organizations).

Also, within our law firm, and in the community at large, as good colleagues and citizens we need to play fair, avoid "hitting" people (the concern being verbal rather than physical assaults in the legal "playground"), put things back where we find them (so we and our colleagues can find them later when needed), clean up your

own mess (in our case, we need to leave our conference room ready for the next meeting, refill the stapler or printer supplies), respect what belongs to others (whether client funds, or firm revenue attributable to another colleague, or another lawyer's client), and be prepared to apologize when you hurt somebody (such as an abrupt email or agitated tone in conversation which can develop from time to time when under pressure).

The habit of washing your hands before you eat can be recognized as the importance of always being appropriately prepared for meetings. Whether that means dressing appropriately (including having a mask available these days), or, simply having reviewed the key background information, any relevant law, or having prepared any required documentation (such as an agenda) to have as productive a meeting as possible. Perhaps "flush" can be understood as meaning to exhaustively address and resolve every detail necessary to meet a client's needs.

Just like warm cookies and cold milk (in moderation) can be good for us, we learn that our coffee and tea breaks, our supply of snacks for clients and colleagues, and our external networking over meals or "adult beverages" provide key sustenance for our body, mind and spirit. A balanced life is also a key factor in supporting longevity in our careers and our law firm —whether that means exercise, time with family and friends, indulging in hobbies, or enjoying the arts and travel a bit here and there. While taking a nap every afternoon may be impractical in our typical workday, we do try to regularly take a "mental break" at some point each day through small talk with clients or colleagues, or simply checking out social media when we are in between addressing the needs of our legal practice. And, regular vacations, are certainly essential and may allow us to catch up a bit on those missed naps.

When we leave the confines of our office (or break from our computer screens at home), and go out into the world, whether in reality or on social media, we take care to manage our engagements with others by staying in our lane ("watching out for traffic") and maintain connections to our clients and colleagues with our loyal and dedicated conduct (thereby "holding hands" and "sticking together"). We stay aware of "wonder" by continuing to educate ourselves about what is going on in our world and in our practice area—despite all these years of experience, there is always more to learn which can help us be better colleagues, business owners, and lawyers. One of the many wonders of the pandemic has certainly been the incorporation of the virtual meeting into nearly every aspect of what we do personally and professionally, yet, it has also made us value more than ever the gradually increasing opportunities for in person engagements as we emerge from the relative isolation of pandemic times.

Yes, as children, we do learn that we are all mortal and nothing and no one lasts forever (goldfish, etc. die). As time marches on, some of our dear clients, colleagues, and family members pass away, and that teaches us to value them even more while they are with us. Of course, as trust and estates lawyers, that also provides the sustenance of our practice— planning for those inevitable transitions and guiding our clients through them when they suffer a loss. While most of our clients have lived long and productive lives by the time of their deaths, the passing of each client necessarily leaves a void. We find it a great honor and privilege to be of service to a family or other group of beneficiaries as they must navigate the legal process to tie up many of the loose ends.

We are all taught early on to "look" around us, in front of us, behind us, besides us, as well as up and down. Perhaps for us that can means that we need to pay attention to our surroundings (both in our daily interactions and in the community at large), reflect on the past (to sort out what has worked, and what we should try to improve on), try to have vision into the future (as we try to make the best decisions each day which will be impacted by future developments, such as inevitable changes in the law), and seek out the sources of future work opportunities and the resources we will need to ensure they are addressed as well as possible.

One core "learning" that seems to be missing from this seemingly exhaustive list is to maintain gratitude and

avoid any sense of entitlement. Simple things like saying “please” and “thank you” (which we certainly did ALSO learn from our kindergarten days), and really meaning it, makes a huge difference in a law practice. We learn this at the very beginning of our law practice days as we are guided in how to compose letters seeking support from various parties. We were directed that that we need to take care to thank the Judge, as well as the court clerk, in advance for their “kind attention” to a matter. Common courtesies are the way we show respect and appreciation for the roles that so many other folks play in allowing us to properly serve the needs of our clients, and thus sustain our livelihoods.

Undoubtedly, there are a number of other key factors that have allowed us to reach this milestone. However, we truly hope that our shared gleanings will be of use to many of our readers in mapping out their own careers as time goes by. And, we are endlessly grateful for the opportunities we have been entrusted with by our clients and referral sources over the years, as well wonderful support from other professionals in the community who, year after year, assist us in meeting our clients’ needs. We very much hope we will be successful in continuing to earn and benefit from that trust and support for many years into the future, and plan to continue to apply these lessons in our efforts to do so.

Rebecca Rosenberger Smolen *and* **Amy Neifeld Shkedy** *are members and co-founders of Bala Law Group. They focus their practices on tax and estate planning.*

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