

# Basic Boot Camp Master Index

## Module 1 - Firm History & Culture [11 Minutes]

History: 0:25

Core Story: 2:37

Vision: 3:45

Mission: 3:50

Values: 5:08

## Module 2 - Practice Areas [13 Minutes]

Probate Administration: 0:37

Trust Administration: 1:20

Beneficiary Representation: 2:16

Conservatorship Appointment: 3:34

Conservatorship Disputes: 4:26

Probate Disputes: 5:32

Trust Disputes: 6:32

Estate Asset Recovery (850): 10:04

Estate Planning: 11:52

## Module 3 - Team Member Services [18 Minutes]

Staffing & Promotions: 0:30

Training & Development: 6:40

Compensation: 9:11

Compliance: 14:57

## Module 4 - Managing Daily Activities [40 Minutes]

File Review: 1:14

Client Objectives: 10:57

Strategy: 14:35

Assignments: 19:46

Tasks: 25:34

To-Do Lists: 28:28

Mastering Time Management: 32:07

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### Module 5 - Systems [8 Minutes]

- Best Practices Systemized: 0:46
- People Trained to Run Systems: 3:23
- Systems Run Firm: 5:28
- Systems Frequently Updated: 6:28

### Module 6 - Software [24 Minutes]

- Pin Frequently Used Tabs: 0:32
- G-Suite (7 Parts): 1:35
- MyCase (20 Parts): 9:36

### Module 7 - Resources [10 Minutes]

- Introduction: 0:31
- Athena (3 Parts): 1:15
- CEB: 3:35
- Adobe: 4:40
- Document & File Builder: 5:24
- Judicata: 6:13
- Estate Planning Software: 7:47
- Title Search: 8:08

### Module 8 - Calendar Management [27 Minutes]

- Managing Your Schedule: 0:27
- Coordinating with Court: 3:27
- Entering Hearing Dates: 13:22
- Calendar Conflicts: 15:51
- Entering Due Dates: 19:18
- Time Blocking: 20:28

### Module 9 - The Business of Law [34 Minutes]

- Purpose of Business: 0:38
- Entrepreneur Mindset: 6:29
- Working on Funded Cases: 11:38

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Don't Drain The IOLTA: 16:13

Balance Evergreen & Deferred Comp Cases: 20:26

Risk Management: 23:23

Never Burn Bridges: 26:41

### Module 10 - Client Service Agreements [32 Minutes]

4 Tricky Rules: 0:34

Evergreen: 9:16

Estate Plan: 13:49

Probate Administration: 15:32

Contingency: 22:25

Modification: 25:51

Conflict Waivers: 30:00

### Module 11 - Client Care [48 Minutes]

What are their objectives?: 1:10

Why did they hire us?: 4:46

Overview of sales process: 9:39

How to build relationships: 12:45

How to destroy relationships: 19:11

How to rehabilitate relationships: 25:20

Managing Expectations: 31:10

Client Control: 36:11

Client Reviews: 40:00

### Module 12 - Meetings [20 Minutes]

Team Meeting (new case): 0:51

Initial Client Meeting: 3:40

Calendar Meeting: 9:49

T-D Meeting (to-do list): 11:37

Open Door Policy: 14:24

Mentor Meeting (Text): 17:07

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### Module 13 - Case Theme & Strategy [21 Minutes]

- Planning to Win: 0:38
- Develop Characters: 2:41
- Clearly Identify Villain: 5:26
- Pick Right Fight: 9:24
- Organize Story: 14:17
- Repeat Theme (Story) Often: 19:20

### Module 14 - Initial Client Meeting [15 Minutes]

- Scheduling: 0:49
- Phone v. Office Appointment: 4:16
- Purpose: 6:43
- Action Items: 10:58
- Do's and Don'ts: 13:42

### Module 15 - Drafting Time Entries [36 Minutes]

- Enter after completing task: 1:19
- Reflect benefit (value): 3:43
- Write in complete sentences: 8:52
- Don't block bill: 11:44
- Finish with disposition: 15:40
- When to use No-Charge: 17:10
- Examples: 21:06
- Billing Time v. Serving Clients: 31:47

### Module 16 - Legal Memorandum [11 Minutes]

- Who Should Write Them: 0:37
- When to Use Them: 1:17
- How Soon Should They be Written: 3:22
- What Format: 5:11
- How Much Billable Time: 6:56
- Why Are They Important: 8:00

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### Module 17 - Initial Pleadings [13 Minutes]

Non-Litigation: 0:43

Litigation: 1:18

Probate Court Wobbler: 1:56

Note: Probate Code 1022: 4:28

### Module 18 - Motions [38 Minutes]

Basic Procedures: 0:28

Pleading Stage: 6:11

Discovery Stage: 13:27

Motion Stage: 21:08

Settlement Stage: 23:48

Trial Stage: 27:20

Closing Stage: 34:24

### Module 19 - Court Appearances [1 Hour, 41 Minutes]

Confirm Logistics: 1:04

In Court v. Court Call: 4:36

Purpose of Hearing (6 parts): 10:32

Prepare/Is Client's Presence Necessary?: 44:23

Managing Delays (Yours/OPCs): 53:38

Parking/Arrival/Screening: 58:54

Check (Posted) Docket, Case Call Order (RFA): 1:00:27

Checking in with Court Staff/Filing Documents: 1:13:49

Stating Your Appearance for the Record: 1:25:38

Listen to Judge/Be Flexible/Present Options: 1:32:28

Working With Court Reporter: 1:36:28

Notice of Ruling (Don't Waive): 1:39:21

### Module 20 - Court Orders [21 Minutes]

Preparing Orders: 0:31

Judicial Council Forms: 2:38

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Order Form & Content (8 Parts): 4:10

Order Dispute - Defend: 14:02

Order Dispute - Prosecute: 19:00

### Module 21 - Court Personnel [21 Minutes]

Bench Officers: 0:28

Courtroom Dynamics: 2:42

Probate Attorney: 5:21

Court's Clerk: 6:53

Bailiff: 10:11

Law Clerks: 11:54

Disqualifying a Judge: 14:53

Court of Appeal: 18:38

### Module 22 - Interacting With Opposing Counsel [34 Minutes]

General Civility & Professionalism: 0:37

Civility During Discovery: 9:38

Civility in the Courtroom: 18:12

Meeting Locations: 24:57

Communications With Opposing Party: 28:44

### Module 23 - Interacting With Experts [51 Minutes]

Types of Experts: 0:31

Decision to Retain Expert Witness: 1:21

Working With Experts: 3:54

Disclosing Experts (5 Parts): 6:48

Gamesmanship: 8:22

Expert Deposition (17 Parts): 20:53

Benefit of Expert Reports: 50:12

### Module 24 - Discovery Plan [34 Minutes]

When Should You Do Them: 0:30

Content & Format: 1:23

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Sample (14 Parts): 1:55

Benefit to Client: 27:17

Updating: 32:21

### Module 25 - Settlement Conferences [20 Minutes]

Types: 0:25

Preparation: 2:38

MSC Brief Format: 9:56

Mediation Tips: 13:07

### Module 26 - Client Files [24 Minutes]

Types: 0:31

Folder Labels & Purposes (Litigation): 1:18

Folder Labels & Purpose (Administration): 2:47

Folder Labels & Purpose (Estate Plan): 3:06

Naming: 4:07

Maintenance: 5:48

Voluminous Records: 12:33

Related Cases: 16:34

Tear-Down & Shredding: 20:09

### Module 27 - Probate Notes [14 Minutes]]

Finding Probate Notes: 0:24

How They're Used: 4:35

Clearing Notes: 7:22

Uncleared Notes: 9:16

### Module 28 - Discovery I - Scope, Protective Orders, Workflows, Templates, e-Discovery [48 Minutes]

Scope (2 Parts): 0:32

Limits (2 Parts): 2:41

Keeping Information Private: 8:18

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Protective Orders: 9:58  
Workflows: 22:38  
Templates: 24:49  
Doc Builder: 30:34  
Electronic Discovery (6 Parts): 32:59

### Module 29 - Discovery II - Types, Subpoena, Depositions [1 Hour, 4 Minutes]

Practice Tip: Working with Clients: 0:42  
Form Interrogatories FROGs: 9:06  
Practice Tip: Interrogatories: 12:05  
Special Interrogatories SROGs: 13:58  
Request for Production of Documents RPOD: 20:05  
Request for Admission FRAs: 22:03  
Request for Inspection of Property & Things: 26:00  
Subpoena (19 Parts): 29:30  
Notice to Appear & Produce: 59:13

### Module 30 - Fiduciary Accountings [32 Minutes]

Accounting Types: 0:38  
Trust Accounting Basics: 4:08  
Fiduciary Accounting Goals: 6:59  
Case Types Requiring Accountings: 8:18  
Working with Client: 8:45  
Six Pass Method: 16:18  
Accounting Format (10 Parts): 18:44  
Conservatorship Accounting (2 Parts): 26:21  
Court Compel, Approval & Objections: 28:41

### Module 31 - Serving Notice [15 Minutes]

Due Process Rights: 0:34  
Ex Parte (without notice): 4:19  
Notice Required for Jurisdiction: 6:17  
Methods of Service: 8:00



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Waiving Notice: 11:42

Using Action Slip - Service: 12:33

### Module 32 - Trial Preparation [48 Minutes]

Be Courteous To The Court Staff: 0:53

KISS (Keep It Super Simple): 5:26

Have Strong Trial Themes: 6:40

Use Best and Most Experienced Experts: 8:35

Understand Court Staff Watches Everything: 12:54

The Three C's - Credibility, Creditability, Creditability: 22:12

Don't Be Adversarial With The Judge: 29:55

Preparation, Hard Work is Key: 32:55

Always Wear White Hat: 39:14

Know the Law: 40:43

Organize the Trial: 42:36

### Module 33 - Trial Notebook [30 Minutes]

Purpose: 0:32

Completion Date: 1:12

Materials: 2:55

Sections (10 Parts): 5:09

### Module 34 - Fixing Mistakes [9 Minutes]

Mistakes Happen: 0:34

Fatal Mistakes: 1:23

Turning Mistakes Into Opportunities: 2:17

473 Motions: 3:58

### Module 35 - Client Separation [20 Minutes]

Reason for Separation: 0:29

Disengagement Letter: 5:45

Substitution of Attorney: 8:20

Motion to be Relieved: 9:20

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Request for Special Notice: 12:14

Internal Procedure (MJR Review): 14:04

Settling IOLTA Account: 16:34

Client File: 18:27

### Module 36 - Common Ethical Issues [20 Minutes]

Who is the Client: 0:40

Client Capacity: 6:03

Certificate of Independent Review: 9:46

Case - "Inactive Status": 12:27

Representing Multiple Parties Same Case: 17:05

Conflict of Interest Check: 19:35