STATE BAR OF WISCONSIN
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Your Practice. Our Purpose.

WSSFC 2026

Practice Management Track – Session 2

Taking Care of Your Firm So You Can Sleep at Night

Presented By:

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Moderated By:
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About the Presenters...

J. David Krekeler of Krekeler Law, S.C., devotes his practice to solving financial problems for Wisconsin businesses and individuals. He is a past chair of both the Bankruptcy, Insolvency and Creditors' Rights Section and the Solo & Small Firm Section of the Wisconsin State Bar, as well as the Western District of Wisconsin Bankruptcy Bar. Only six Wisconsin lawyers are certified as business bankruptcy specialists, and David has been one of them for many years. He is past chair of the Bankruptcy Insolvency and Creditors Rights section of the Wisconsin State Bar, as well as the Western District Bankruptcy Bar Association. He is also past chair of the Solo and Small Firm section, and the 2021 recipient of its John Lederer distinguished service award. He has been selected as a Super Lawyer every year for at least the last 17, as well as being included in the Best Lawyers of America during those same years. He recently published his first book, "Bankruptcy Asked and Answered" (available on Amazon). His second book, this one on law office management, should be out by this spring. When not solving financial problems, you will find David on dinner dates with his wife, Mary, and enjoying time with his children and grandchildren. Sunday night dinners are a ritual. You can connect with David on LinkedIn at linkedin.com/in/david-krekeler or follow him on Twitter (X) twitter@jdavidkrekeler.com. Subscribe to his free newsletter by sending him an email. He also has a standing offer to meet with you to discuss bankruptcy and related topics. He buys the coffee and bagel.

Erin R. Ogden is a trademark and copyright nerd who loves helping businesses grow. Whether helping clients directly or working with other attorneys to help their clients, she helps identify, protect, and monetize intellectual property while looking at the business holistically. Her firm's points of culture are Make things as simple as possible, but no simpler; Play well with others; Speak English, not legalese; and Be the reason it works. She loves putting that into practice with her colleagues and business clients. Drop her a line or connect on social media. We'll nerd out together!

Nathan Russell is the founder and owner of Russell Law Offices, SC. Born and raised on his family's fifth generation dairy and crop farm in Shullsburg, he returned to Southwest Wisconsin to practice law in 2009. Nathan earned a degree in Agricultural Economics and his Juris Doctorate from UW-Madison. Prior to opening Russell Law Offices, Nathan taught Agricultural Education in Minnesota and served as an agriculture and commercial lender in Madison. With extensive experience in agriculture and lending, Nathan's practice areas include real estate, contracts, business/farm transfer and startup, civil litigation, estate planning, probate & trust administration, creditor collections, municipal law, and family law. Nathan also has extensive experience in contested probate and divorces that involve farms/businesses. Nathan is married to Jennifer, whom he met through the FFA. Jennifer is the agricultural education and FFA instructor in Shullsburg, WI. They have six children: Reagan, Madison, Taylor, McKinley, Lincoln, and Jackson. Outside the office, Nathan is an avid sports fan supporting the Packers, Badgers, Bucks, Brewers, and Miners/Knights. He is heavily involved in his childrens' activities, including assisting them show sheep across the country. Nathan is also very proud to be starting his 14th year serving as the girls' basketball head coach for Shullsburg. Nathan has recently been sworn into the Illinois State Bar and is excited to serve clients in Northwestern Illinois. Nathan has presented to a variety of community and professional groups on numerous legal topics. He has been active in the Lafayette County community by previously serving on the Shullsburg Fund Board, Memorial Hospital Foundation and the Shullsburg School Board.

Mary C. Turke is the founder of Turke & Steil S.C., a Madison and Janesville, Wisconsin law firm built on the idea that smart business decisions and genuine client care go hand in hand. Her practice spans business law, civil litigation, family law, construction law, personal injury, and creditors' rights matters, with particular focus on contracts, entity formation, and technology agreements. Since 2020, she has served as an arbitrator on the American Arbitration Association's commercial dispute resolution panel. A graduate of the University of Wisconsin Law School, Mary has been named a Wisconsin Super Lawyer in Business Litigation every year since 2018, listed in The Best Lawyers in America® for Commercial Litigation since 2013, and recognized with the Wisconsin Law Journal's 2026 Women in the Law award. She is also a 2025 recipient of this conference's John Lederer Distinguished Service Award. Admitted to the Wisconsin bar in 1996, she lives in Madison, where she can usually be found running or playing bad golf.

TAKING CARE OF YOUR FIRM SO YOU CAN SLEEP AT NIGHT

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I. START WITH GOALS

Begin by setting goals for yourself. Goals require a vision of what you want for your future. Know why you want to grow your practice. Know how that growth will fit with your Mission Statement or vision.

Write down your goals. A study of Harvard MBA graduates examined the importance of having written goals. 3% had written goals. 13% had goals, but those goals were not reduced to writing. 84% had set no goals at all.

Ten years later, the 13% who had goals but had not put them in writing had about twice the income of the 84% who had not set goals. The 3% who had written goals had an average income about 10 times as much as the other 97% of the class.

No growth for the sake of growth. Bigger is not always better. But without growth, profits are limited.

365 days

- 104 Weekends
- 7 Holidays
- 15 Vacation
- 6 Sick Days
- 5 CLE/Seminars
- 226 Billing Days

With employees comes leverage

Growing the practice beyond yourself will add complexity to your life. Just as children do.

Having employees changes you from being a technician or an artisan To➔ Business Owner

Having a business requires employees & systems

II. SYSTEMS

Empowerment ➔ Tell employee the goal or objective and let the employee go for it

But systems & processes provide substantial benefits.

Empowerment w/o systems & processes results in having to re-learn mistakes.

Inefficient & costly.

Not having systems and processes discourages delegation: "I can do it faster myself"

"I can do it better myself"

The first system to design is your system.

Write down how you did what you did. Example: Opening the office

- Pick up newspaper
- Newspaper on lobby table
- Make coffee
    - 4 tablespoons of coffee
    - 96 oz. water
- Empty dishwasher
- Move client mugs to reception area
- Boot receptionist computer
- Boot attorney computers
- Pull up attorney to-do list
- Place files on attorney side table
- Turn on copier
- Green button in the lower right corner
- Listen to voicemail
    - Enter 6427#
    - Then Enter 5
- Forward messages

Provide sufficient detail that a new employee could do it right the first time.

Benefits:

- If you cannot make it in first
- If your employee cannot make it in first
- If a new person is handling this task

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Systems can be substantive as well

- You may know every step & detail
- You would delegate if you knew it would be done right

The value of written systems and processes grows as the number of employees grows.

"I would delegate, but I want it done the way I would do it." Systems and processes can be grouped into 3 types of law firm activities:

Systems and processes can be grouped into 3 types of law firm activities:

- Operations –

    Knowledge consists of numerous processes

    "The ability to identify, capture, and leverage the internal knowledge of individuals."

- Project Management - Things you do on an individual client matter
- Schedule/calendar deadlines
- Motion to amend Chapter 13 Plan, e.g.

When something goes wrong, you fix it. But if you don't do more, you are making a second mistake.

- Write down what happened and how to avoid it.
- Incorporate the lesson learned into your firm's policies.
- What you will have is a new procedure or checklist. Or maybe a new clause or template in a pleading or template contract.

You will have taken steps to ensure the error will not recur, whether by you or someone else.

But what about empowerment?

- People are not robots.

No, but beginners (at any task) take comfort in and benefit from systems and checklists.

Empowerment comes from having those people critique and supplement those systems and checklists.

B. Keeping it simple while adding complexity

Systems can be as simple or as detailed and complex as you wish to make them. Lawyers and law firms are late to the game of operations management. Manufacturers have been utilizing operations management tactics for a long time. Some business historians cite Henry Ford as the father of just-in-time ("JIT") production methods.

Popularized in the 1980's by Toyota, these methods and others are continuing to be refined and are now becoming applicable to service industries, including law firms.

POKA-YOKE

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Poka-yoke is a Japanese word generally meaning "error proofing." Again, adopted by Toyota as part of its production system, it is designed to reduce the probability of errors or defects.

Poka-yoke techniques that could be employed by a law firm might include checklists, templates, and manuals. Such aids are essential as a firm grows and adds employees, but even solo practitioners could employ these devices.

The amount of knowledge required to skillfully practice law, and the complexity of that knowledge, exceeds what any one of us can know and remember reliably.

Employing poka-yoke principles can free our minds to consider the significant issues while knowing that the easy or lesser matters are still being covered.

KAIZEN

Kaizen is another Japanese term, roughly equivalent to the word "improvement." The translation of Kai is "change," and Zen is "good." This concept also became widespread and popular in the 1980's.

Some of the features of Kaizen are:

- Continuous improvement. Every member of the firm should always be seeking ways to improve his or her own performance.
- Ideas come from employees themselves. This makes the ideas more likely to complement existing practices and thus easier to implement.
- Small changes generate improvements much more often and much more quickly than radical changes.
- Small improvements typically require much less investment of capital, time or labor than do major changes.
- Because improvements come from employees themselves, morale and motivation are improved and teamwork reinforced.

Kaizen emphasizes continuous improvement.

Each of us should therefore be questioning everything about our methods, and consider how to do something better rather than why it cannot be done.

Mistakes provide opportunities. Correct the mistake and determine what measures would help prevent that error from reoccurring.

You need not seek perfection. Strategy is essential, but of little importance if you do not execute.

Always ask, "Why?"

CONSISTENCY

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Some commentators on business operations believe that systems in some respects are the hallmark of an entrepreneur. They suggest that true entrepreneurs are more driven by creating systems for the work than by actually doing the work.

For example, Ray Kroc, who founded McDonald's, would never have expanded

his burger empire if he were in business because he loved making hamburgers himself.

I use Ray Kroc as an example because Michael Gerber did so in his book, The E-Myth. Gerber asserts that most lawyers are technicians. Not business owners.

To have a business as opposed to a job requires employees and systems. He suggests that lawyers run the law practice like a franchise.

But is practicing law the same as selling hamburgers? I think not, but we can all improve our practices by expanding our use of documented systems and processes.

III. COMPENSATION

Compensation disputes is the number one cause of law firm breakups. And it is not just about partner compensation. Nearly 20% of law firm associates changed firms in 2025. 83% of those who left did so within the first five years of joining their firm. That is the highest level ever recorded. (1. National Association for Law Placement) Changing firms is often the fastest way to obtain a significant pay increase. (2. BCG Attorney Search)

Salary-based compensation

Under a salary system, an associate receives a fixed amount regardless of the amount billed or collected.

Example

Associate salary: $80,000 per year.

Whether the lawyer bills 1,000 hours or 1,800 hours, compensation remains essentially unchanged (perhaps with occasional bonuses).

Advantages

For the firm

- Predictable payroll expense.
- Lawyers are more willing (maybe) to assist each other because compensation is not tied to individual production.
- Easier administration.

For the associate

- Steady and predictable income.

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- Less stress regarding collections or business development.

Disadvantages

For the firm

- Associates have little economic incentive to maximize productivity.
- Owners often feel they are carrying the entire financial risk.
- High performers can be paid the same as low performers.
- No incentive to grow a practice or a book of business.

For the associate

- Productive lawyers may feel underappreciated.
- Limited ability to increase personal earnings.

Typical Result

- Adequate legal work.
- Decent quality.
- Friction over perceived underperformance.

COMPENSATION BASED ON GROSS BILLINGS

Under this system, compensation is tied to the amount billed rather than the amount collected.

Example

Associate bills $400,000.

Compensation formula: 30% of billings

Associate earns: $80,000, regardless of whether the firm actually collects the money.

Advantages

For the firm

- Usually leads to increased billable hours.
- Associates become more conscious of time entry and productivity.

For the associate

- Strong incentive to increase production.
- Greater control over earnings.
- Clear connection between work performed and compensation.
- Associates view the system as objective and fair.

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Disadvantages

For the firm

- Collections may not increase proportionately.
- Lawyers are rewarded for creating invoices, not cash.
- Associates have little reason to:
    - Screen clients for collectability.
    - Push collections.
    - Avoid excessive write-downs.
    - Consider realization rates.

Typical Result

Billing increases because associates know every additional dollar billed increases compensation.

However:

- Clients dispute bills.
- Accounts age.
- Write-offs increase.

The firm's profitability often does not rise as much as expected.

Lawyers can unintentionally develop a "bill it and move on" mentality.

III. COMPENSATION BASED ON COLLECTIONS

Under this system, an associate is paid based on fees actually received by the firm.

Example

Associate bills $400,000. Firm collects $320,000. At 30% of collections: Associate earns $96,000.

Advantages

For the firm

- Compensation tracks actual revenue.
- Cash flow improves.
- Associates become more conscious of:
    - Client selection.
    - Retainers.
    - Accurate budgeting.
    - Collection efforts.

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    - Realization rates.
- Better alignment between firm profitability and lawyer compensation.
- Grooms future partners

For the associate

- High performers who generate collectible work are rewarded.
- Encourages business judgment in addition to legal skill.
- Learns business side of law
- Helps in becoming an owner

Disadvantages

For the firm

- More complicated to administer.

For the associate

- Less predictable income.
- Factors outside the associate's control might affect compensation.
- Partners may make collection decisions that impact compensation.
- Delays between work performed and compensation received.

Typical Result

Collections generally improve.

However, associates often become concerned about:

- The firm's billing practices.
- Write-offs they did not approve.
- Whether collections are properly credited.
- Cash flow timing.

REWARD ORIGINATIONS

Clients are the lifeblood of our practices. Without them, we have no one to help. We have no income. We have no purpose.

We should encourage all of our lawyers to generate clients. Combining an origination credit with compensating based on collected funds is a fair and balanced approach.

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It rewards:

- Bringing in business.
- Performing work efficiently.
- Producing actual cash collections.

The combination of origination credit and compensating based on collections encourages lawyers to perform work well and satisfy clients at every touchpoint.

Be sure to carefully define what origination entails.

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Russell Law Offices, SC Employee Handbook

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Reviewed – January 2024

Finalized – January 2025

Introduction

The purpose of this Employee Handbook is to provide the Attorneys and Salary of Russell Law Offices, S.C. with the policies and procedures adopted by this Firm. This Employee Handbook should be consulted when any questions arise as to the responsibilities of the Firm to its employees and the employee's responsibilities to the Firm and its clients.

These policies and procedures have been established to ensure that this Firm complies with applicable laws, rules, and regulations and to ensure a pleasant, safe, and rewarding work environment for employees, attorneys, staff, and clients.

From time to time, conditions and circumstances may require the Firm to change, modify, amend, or delete the policies or procedures in this manual. Russell Law Offices, S.C. reserves the right to revise or terminate any or all policies, procedures or benefits in whole or in part, with or without notice at any time. When changes are made, you will be notified of the new or revised policy or procedure.

Questions regarding the interpretation of any of these policies or the procedures and policies contained in this Handbook should be referred to Russell Law Offices, S.C. Managing Partner.

As an employee of our Firm, the importance of your contribution cannot be overstated. Our goal is to provide quality services to our clients. By satisfying our clients' needs, they will continue their relationship with us and will recommend us to others.

You are an important part of this process, for your work directly influences our Firm's reputation and the experience each of our clients has when working with us.

We are glad you have joined us, and we hope you will find your work here to be both challenging and rewarding

Russell Law Offices, S.C. complies with the Wisconsin Supreme Court Rules of Professional Conduct for Attorneys and all applicable provided Guidelines for the Practice of Law in the State of Wisconsin as well as applicable state and federal laws governing employment, the provision of legal services, and debt collection.

Russell Law Offices, S.C. provides debt collection and other debt services to some of its clients. Russell Law Offices, S.C. provides and trains employees on Fair Debt Collection and Fair Credit Reporting practices and maintains and trains employees on FDCPA and FCRA policies and procedures. Training and policies are included herein and updated to reflect current U.S. and State of Wisconsin regulatory requirements.

This handbook may be updated from time to time and is subject to change as applicable laws, guidelines, standards, and procedures are updated to conform with applicable regulation and or other Requirements.

Employees are instructed to read and review the policies and procedures herein contained.

***Failure to adhere to the policies, requirements, and guidelines herein contained may lead to termination of employment, suspension, or other remedial measures*.**

Defined Terms

Agent or Agents: Includes anyone serving Russell Law Offices in any capacity as a contractor, agent, and or representative. This includes non-wage earning hourly, part-time, and all 1099 personnel.

Client or Clients: Legal clients represented by Russell Law Offices, S.C., whether or not the client is currently receiving legal representation.

*Russell Law Offices may owe a duty to former or prospective clients under Wisconsin law. Russell Law Offices has provided this handbook as training and reference material for employees regarding these duties and ongoing efforts to ensure the legal rights and confidences of clients are maintained by our office.

Employee or Employees: Employees as described by this include hourly, salaried, and exempt and non-exempt. Your employment status with Russell Law Offices, S.C. depends on your agreement with Russell Law Offices, S.C. and is not modified by any chapter, section, or material herein contained.

Firm, Our Office, We, or Russell Law: We are Russell Law Offices, S.C., a Wisconsin registered Service Corporation providing legal services in southwest Wisconsin and surrounding areas in areas of general practice and debt collection.

Firm Attorney, Attorney, or Attorneys: Lawyers or Of Counsel designated attorneys, whether licenses inside and or outside the state of Wisconsin working for or with Russell Law Offices, S.C.

Employee Handbook or Handbook: This handbook is the Employee Handbook and contains policies, procedures and rights associated with the function of this office and your employment. Any reference to such a policy manual or handbook refers to this document and the policies contained herein.

Managing Attorney: Designated individual within Russell Law Offices, S.C. who serves as the directing Attorney for all employees.

At-Will Employment

Unless the existence of a written contract stating explicitly otherwise, all employees of Russell Law Offices, S.C. are at-will employees. This means for all at-will employees the employee and the Firm are free to terminate the employment relationship at their discretion. No supervisor or other firm representative has the authority to alter this relationship, and you should never interpret any such person's remarks as a guarantee of continued employment.

Equal Employment Opportunity

Russell Law Offices, S.C. is committed to providing equal employment opportunities to qualified persons without regard to race, color, sex, religion, creed, national origin, disability, genetic information, age, marital status, sexual orientation, pregnancy, veteran status, or any other protected category.

Our continued success depends heavily on the full and effective utilization of qualified persons. We strive to hire, develop, and retain the most qualified people we can find basing our judgment on each individual's job-related qualifications, capabilities, and potential.

Our policies relate to all phases of employment, including advertising, recruitment, hiring, placement, promotion/demotion, training, transfer, layoff, recall, termination, compensation and rates of pay, employee benefits and participation in all employer sponsored employee activities

Standard of Conduct

When groups of people work together, reasonable rules are necessary to conduct an orderly business and make working conditions more pleasant for everyone.

As an employee, it is expected that you will adhere to all policies and practices of the Firm. It is further expected that you will conduct yourself in a professional manner at all times, and exhibit the highest level of integrity in performing your job. It is equally important to maintain a positive work environment through good working relationships with our clients, colleagues, and your coworkers, and that emphasizes our commitment to good customer service.

Discrimination, Harassment, and Retaliation

Russell Law Offices, S.C. expressly prohibits discrimination, harassment and retaliation based on race, color, sex, religion, creed, national origin, disability, genetic information, age, marital status, sexual orientation, pregnancy, political view or affiliation, veterans' status, or any other protected category.

Conduct that interferes with the Firm or an individual's work performance, or creates an intimidating, hostile or offensive working environment is prohibited. The Firm will not tolerate any attempts of retaliation against an employee who raises a sincere and valid concern that this policy has been violated.

The Firm takes all allegations of discrimination, harassment and retaliation very seriously and is firmly committed to ensuring a workplace free of discriminatory activities. Anyone engaging in discrimination, harassment, or retaliation is subject to disciplinary action up to and including termination.

Harassment Prohibited – Definition

As used in this policy, the term "harassment" refers to conduct relating to a person's race, color, religion, creed, sex, age, national origin, marital status, genetic information, sexual orientation, pregnancy, political view or affiliation, veterans' status, disability or perceived disability, which fails to respect the dignity and feelings of the individual. This policy protects and covers the conduct of all employees, vendors, clients and visitors.

Harassment that is forbidden by this policy can take several forms, including, but not limited to:

Sexual Harassment

The definition of Sexual Harassment includes unwelcome sexual advances, requests for sexual favors, or other verbal or physical conduct of a sexual nature which unreasonably interferes with an employee's work performance or creates an intimidating, hostile or offensive environment (and/or) where the individual is made to feel as if he or she must agree to the request or submit to the advance in order to get favorable treatment at work.

While not exhaustive, the following is a list of some examples of sexual harassment:

- Unwanted sexual advances.
- Offering employment benefits in exchange for sexual favors.
- Making or threatening reprisals after a negative response to sexual harassment.
- Visual conduct such as leering, making sexual gestures, displaying or distributing sexually suggestive objects or pictures, cartoons or posters.
- Verbal conduct such as making or using sexually derogatory comments, epithets, slurs or jokes.
- Verbal sexual advances or propositions.
- Verbal abuse of a sexual nature, graphic verbal commentaries about an individual's body, sexually degrading words used to describe an individual, suggestive or obscene letters, notes or invitations.
- Physical conduct or threat of physical conduct, such as touching, assault, or impeding or blocking movements.

Racial, Color, Religious, National Origin, Marital Status, Genetic Information, Sexual Orientation, Pregnancy, Political View or Affiliation, Veterans' Status, Disability or Age Harassment

This form of harassment can include any verbal, written or physical act that makes an employee uncomfortable at work or interferes with an employee's ability to perform their job, and is based on race, color, religion, national origin, disability, political view or affiliation, marital status or age.

Reporting and Investigating Discrimination, Harassment and Retaliation

In an effort to eliminate all workplace discrimination, harassment, and retaliation, the Firm will utilize an internal investigation process to respond to any such complaints. Anyone who believes he or she is being subjected to discrimination, harassment, or retaliation, or who has witnessed such conduct, must report the conduct to a Managing Attorney immediately.

A thorough investigation will be conducted and there will be no retaliation against victims or witnesses for participating in the investigation.

Anyone who knowingly fails to report a witnessed incident of discrimination, harassment, or retaliation may be subject to disciplinary action.

Confidentiality

In cases involving a report of harassment or discrimination, all reasonable efforts will be made to protect the privacy of the individuals involved. In many cases, however, the Firm's duty to investigate and remedy harassment makes absolute confidentiality impossible. The Firm will try to limit the sharing of confidential information with the employee on a "need-to-know" basis. Employees who assist in an investigation are required to maintain the confidentiality of all information they learn of or provide.

Assurance of Non-Retaliation

The Firm expressly prohibits retaliation of any kind against anyone for reporting harassment or discrimination. Any such retaliation will not be tolerated and may result in discipline up to and including termination.

Standards of Conduct

As an employee, it is expected that you will adhere to all policies and practices of Russell Law Offices, S.C. It is further expected that you will conduct yourself in a professional manner at all times and exhibit the highest level of integrity in performing your job. It is equally important to maintain a positive work environment through good working relationships with our coworkers, clients, the court and court system affiliates, adverse counsel, and other legal services.

Unacceptable Conduct and Activities

Generally speaking, Russell Law Offices, S.C. expects each person to act in a mature and responsible manner at all times, even outside of work. Your behavior, both in and outside of the office, reflects on this Firm. If you have any questions concerning any work or safety rule, or any of the unacceptable activities/conduct listed below, please see a Managing Attorney.

Note that the following list of unacceptable activities/conduct does not include all types of conduct that can result in disciplinary action, up to and including termination. The Firm in its sole discretion will determine the appropriateness of the employee conduct. The following is a list of non-exhaustive unacceptable activities/conduct both in and outside of the office, for all employees, is as follows:

1. Violation of any Firm rule in this handbook; or any action that is detrimental to the Firm's efforts to operate profitably or reflects poorly upon the Firm's mission or reputation.
2. Violation of any Rule of Professional Conduct as set by the Wisconsin Rules of Professional Conduct for Attorneys.
3. Negligence or any careless action, which endangers the life or safety of another person.
4. Being intoxicated or under the influence of a controlled substance while at work; use, possession or sale of a controlled substance in any quantity while on the Firm's premises, except medications prescribed by a physician which do not impair work performance.
5. Unauthorized possession of dangerous or illegal firearms, weapons or explosives on the Firm's premises.
6. Engaging in criminal conduct or acts of violence.
7. Insubordination or refusing to obey instructions properly issued pertaining to your work.
8. Negligently causing the destruction or damage of Firm property, the property of fellow employees, clients, or visitors in any manner.
9. Theft or unauthorized possession of Firm property or the property of fellow employees; unauthorized possession or removal of any Firm property, including documents, from the premises without prior permission from

management; unauthorized use of Firm equipment or property for personal reasons, using Firm equipment for profit.

10. Dissemination of internal Firm documentation, data, proprietary information, or other trade secret that is not generally known to the public and is disclosed written or orally, or appears to a reasonable person to be proprietary or confidential.
11. Dishonesty; falsification or misrepresentation on your application for employment or other work records; lying about sick or personal leave; falsifying reason for a leave of absences or other data requested by the Firm.
12. Engaging in work for a competing firm while an employee; engage in any outside employment or other activity that conflicts with employment duties and responsibilities without written approval from a Managing Attorney.
13. Engaging in behavior which creates discord and lack of harmony; interfering with another employee on the job; restricting work output or encouraging others to do the same.
14. Disclosure of co-worker information.

Conflict of Interest and Ethical Standards

The Firm's reputation for integrity is one of its most valuable assets and is directly related to the conduct of its employees. Management is responsible for the overall direction for the ethical standards and may provide additional guidance that addresses specific circumstances with private conduct and employment conduct. Employees are responsible for knowing and adhering to any component regarding specific guidance.

Employees must never use their position at the Firm or any of its clients for private gain, to advance personal interests, or to obtain favors or benefits for themselves, their families, or any other individuals or business entities. The Firm adheres to the highest legal and ethical standards applicable in our business. The Firm's business is conducted in strict observance of both the letter and spirit of all applicable laws and the integrity of each employee is of utmost importance.

Employees of the Firm shall conduct their personal affairs in such a fashion that their duties and responsibilities to the Firm are not jeopardized and/or legal questions do not arise with respect to their association or work with the Firm. Any employee who has access to client's records, or has access to files that contain sensitive records, and discusses any material with another person, except in duty while working that file, may be subject to immediate dismissal for gross misconduct.

Safety

The health and safety of employees and others visiting the Firm is of utmost concern. It is therefore the policy of the Firm to strive constantly for the highest possible level of safety in all operations. It is our commitment to comply with all applicable health and safety laws, and to ensure that public and work areas are free of hazardous conditions. The Firm will make every effort to provide working conditions that are as healthy and safe as feasible, and employees are expected to be equally conscious about workplace safety, including proper work methods, reporting potential hazards, and reducing exposure to known hazards. You should immediately inform your manager of any unsafe condition or act that you observe. If you can correct an unsafe condition without possible risk of injury to yourself or others, you should take steps to correct it.

The Firm complies with the Occupational Safety and Health (OSH) Act was enacted to "assure safe and healthful working conditions for working men and women" by setting and maintaining the policies contained herein. This includes whistleblower and other occupational protections provided by the Act. For additional information please speak with a Managing Attorney.

The exterior of our building may be under video surveillance and is recorded. Even during normal work hours, the exterior doors to our office should be monitored and when no one in in the office or during office closures kept locked.

Firearms

Russell Law Offices, S.C. has a legal obligation to provide a workplace free of conditions or activities that either the employer or industry recognizes as hazardous and that cause, or are likely to cause, death or serious physical harm to employees where there is a feasible method to abate the hazard. RLO may prohibit employees from carrying concealed weapons on the job, whether on or off the premises, but will not prohibit employees with a CCW license from keeping a weapon in their own vehicle. RLO will not condition employment on prohibiting an employee who has a CCW from carrying a concealed weapon outside the course of their employment. Firearms on RLO property is subject to Management approval.

Worker's Compensation

If an accident does occur while you are working, you must immediately report the incident to a Managing Attorney. A report will be completed by a Firm Attorney. If an injury results from the accident and medical attention is necessary, a claim will be filed with our workers' compensation carrier. For more information on the Workers' Compensation policy, consult with a Managing Attorney.

Reasonable Accommodations

It is recognized that employees may experience either a temporary or permanent impairment, which may impact their ability to perform any, or all of the physical and/or mental requirements of their job duties.

The Firm will consider providing reasonable accommodations for employees which would allow them to continue to perform the essential functions of their position, and which do not impose an undue hardship on the Firm's business.

Any employee having a physical or mental impairment that substantially limits one or more of his or her major life activities and which impacts their ability to perform their job duties should notify a Managing Attorney.

Attendance and Punctuality

Regular attendance and punctuality are important job requirements. The Firm must be able to respond to its clients' needs. In order to perform this obligation, it is essential that all employees report to work regularly and on time. It is each employee's responsibility to overcome minor inconveniences and to strive for perfect attendance.

General working hours for all locations is from 8:00AM to 4:30PM Monday – Friday. Each location may vary slightly, pending Managing Attorney's approval. The Firm's priority is that someone is in each office during these times to best serve our clients via walk-ins and phone calls.

While we understand that flexibility is one of the many benefits of Russell Law Offices, S.C., we require salary employees to maintain a consistent work schedule that aligns with the firm's needs and core working hours. Attorneys and Salary

Employees must be available and responsive during these core hours. Outside of these core hours, employees may arrange their work hours flexibly, so long as required tasks are completed and effective communication is maintained with the firm and Attorney Manager. A regular schedule is preferred for all employees, while the Firm is considerate of circumstances that may arise.

Work-from-home

If an Attorney / Salary Employee is permitted to work from home, they must function like they are in the office by accepting phone calls, working specifically on a firm computer and responding to communications within a timely matter.

Russell Law Offices, S.C. is committed to updating our work-from-home policy to ensure its continued success and effectiveness. Our process involves the conduct of regular reviews of this policy. Employees will be kept informed of changes to the policy.

Russell Law Offices, S.C. reserves the right to terminate or modify remote work arrangements based on factors including job performance issues, evolving business requirements, or changes in job role responsibilities. If a remote work arrangement is terminated, employees will be given reasonable notice of the change and provided with support for the transition back to the in-office environment.

Dress Policy

Employees are expected to maintain the highest standards of personal cleanliness and present a neat, professional appearance at all times. Business dress is required Monday through Thursday. Fridays are casual dress days when jeans in good condition may be worn. If an appointment must be scheduled with a prospective client, client or outside contact, business casual dress will be required, with an emphasis on “business” more so than “casual.”

There are times when employees are gifted or purchase Russell Law Offices branded apparel. It is expected that employees will maintain good character while wearing Russell Law Offices branded apparel.

Certification, Licensing, and Other Requirements

You will be informed if there are any licensing, certifications, or testing requirements for your position. Failure to qualify or to maintain a certification or license may be sufficient cause for termination.

Salary and Benefits

The following is a list of employee benefits. The Firm reserves the right to modify or terminate these benefits at any time for any reason. Where the benefit arises from an established employee benefits plan, it is governed by the plan documents. If hired after the first of the month, benefits are effective the first of the following month.

Pay periods are paid on the 10th and 25th of each month and are paid via ACH by the Firm.

- The Firm offers a 401K, a Safe Harbor and Profit-Sharing Programs for all full-time employees. The Safe Harbor plan includes a firm contribution of 3%. Employees must set up a plan, even with no personal contribution, to be eligible. The 401K plan is contribution by the firm and there is no required contribution from the employee. The

firm will contribute up to 10% based on the level, position of the employee and profitability of the company. An employee's contributions to their 401K will be deducted from their paycheck whether is it a percentage or flat fee per month.

- Professional Organization Memberships as approved by a Firm Attorney.
- Job Related Seminars, Certified Legal Education coverage, and other educational benefits if approved.
- All employees are eligible for statutory benefits. Statutory benefits are mandated by federal, state or local law and include Social Security, Workers' Compensation insurance and unemployment compensation insurance.

Health Insurance

The Firm currently offers Quarts Tiered Choice Plus Health Insurance. Full time Employee premiums are paid by the Firm at 100% for insurance "Gold Plan". If an employee selects the "Platinum Plan" an employee is responsible for the difference between the "Gold Plan" and "Platinum" The Firm also pays 70% of all dependents of the employee. If the employee does not take health insurance, they may be compensated up to $125 per pay period at RLO discretion as an opt-out incentive.

Dental Insurance

Russell Law Offices offers dental insurance to its employees and their families. Full time Employee premiums are paid by the Firm at 100%. The Firm also pays 70% of all dependents of the employee. The Firm currently offers dental insurance through Principle Dental Insurance.

Life Insurance

The Firm offers its employees a term life insurance policy. Attorneys and Support Staff receive varying levels of insurance. Contact the Human Resources Department for more specific information.

Supplemental Insurance

Russell Law Offices gives each employee a $100 monthly stipend to be applied towards supplemental insurance plans. Russell Law Offices facilitates supplemental insurance for its employees through their servicer. If an employee wishes to purchase plans above the stipend amount, it is the employee's responsibility and will be deducted from their paycheck. The Firm currently offers Colonial Life Supplemental Insurance.

Bonuses

Employees may be eligible for bonuses based on performance. These bonuses are dependent on individual employment contracts vary from person to person.

Expenses/Expense Reports

Employees will be reimbursed for all eligible firm expenses they acquire while doing business. This includes but is not limited to: purchasing office supplies, personal vehicle mileage, etc.

All expense invoices that are received must be entered in Smokeball as an expense (ex: postage, milage, office expenses/supplies, etc.). The invoice and reimbursement form should then be emailed to the supervising attorney for approval and then to the Office Manager to process the payment. To be reimbursed, a reimbursement form must be filled out and sent to the Office Manager with all applicable receipts attached – expenses must be substantiated by receipts or funds will not be paid. Russell Law Offices employees are prohibited from issuing themselves a refund check for expenses. All reimbursements forms are due the 28th of the month, will be reviewed and authorized by the Managing Attorney. Funds will be disbursed around 15th of the following month.

Travel/Mileage

At times employees may be required to use their personal car for business purposes. Reimbursement for the operating expenses of the car will be calculated by multiplying the number of miles traveled by the currently approved Standard Mileage Rate established by Russell Law Offices, S.C. The costs of commuting (travel between home and the work site) will not be reimbursed. Personal vehicle mileage is calculated starting from the closest office location to the destination and back, not from an employee's personal home, unless the mileage from their personal home to the destination is less than from the office to the destination. All incurred mileage will be entered into the client matter as an expense and onto the employee's reimbursement form.

In order to exceed the reimbursement amount afforded in this section, an employee must first have approval from a Managing Attorney. Approved exceptions may include court coverage for another attorney; in which case, an attorney may charge against the General Account any additional mileage incurred.

Vacation Days

The Firm recognizes the importance of vacation time in providing the opportunity for rest, relaxation and general well-being. Vacations days are employee specific and may not be available to all employees. Availability is subject to your individual employment agreement or status.

Employees should recognize that they are valued team members by their fellow office workers, and the clients' needs should not be jeopardized by vacation absence. Therefore, a Managing Attorney has the final approval of the vacation schedule. Vacation requests should be submitted at least thirty (30) days in advance to the Managing Attorney.

Sick Leave

Russell Law Offices recognizes that an inability to work because of illness or injury may cause an economic hardship. It is also recognized that employees may require time off to seek necessary medical treatment. Employees who have an unexpected need to be absent from work should notify a Managing Attorney prior to the beginning of each scheduled work day. In any case where the Firm determines an employee has misused or abused sick leave, the employee may be

subject to disciplinary action up to and including termination. A doctor's note may be required at any time deemed necessary by management.

Maternity/Paternity Leave

Russell Law Offices recognizes the importance of parents bonding with their new child. Thus, all employees are given two (2) weeks of paid maternity/paternity leave immediately following the birth of their child. Following the first two (2) weeks of maternity leave, eligible employees may draw short term disability. It is the responsibility of the employee to coordinate this with our supplemental insurance company prior to birth and after birth. Employees will be required to continue to pay their premium portion of all health insurance, dental insurance, and supplemental insurance while they are on leave to continue their coverage until their return.

All employees utilizing maternity/paternity leave should prepare other staff members, supervisors, and clients for their leave. Employees should work together to accomplish/delegate everyday tasks while leave is being used.

Bereavement Leave

In the event of the death of an immediate family member, the employee may be granted up to five (5) paid absence days. Immediate family members consist of the following relatives of the employee: spouse, children (including step-children), parents (including step-parents), siblings, grandparents, or upon proof, any person in the general family whose ties would normally be considered immediate family and/or living within the same household.

Leaves of Absence; FMLA and WFMLA

Family and medical leave provisions under the Wisconsin Family and Medical Leave Act (WFMLA), and the federal Family and Medical Leave Act of 1993 (FMLA), as amended, provide that under Wisconsin law, an employee is entitled to take up to two (2) weeks per year to care for a parent (including parents-in-law), child, or spouse with a serious health condition. Federal law allows an employee up to twelve (12) weeks per year to care for a parent, child, or spouse with a serious health condition.

An eligible employee may request Family and Medical Leave ("FMLA leave") for up to twelve (12) weeks in a twelve (12) month period due to the serious health condition of the employee, employee's spouse, child, or parent, or for the birth, adoption, or foster care of a child. Eligibility for leave for the birth, placement, or adoption of a child expires twelve (12) months after the birth, placement, or adoption. An eligible employee is an employee who has been employed for a minimum of one (1) year and worked 1,250 hours within the previous twelve (12) months. The twelve (12) month period is measured by looking at the twelve (12) month period immediately prior to the date on which leave is requested. Spouses who are both employed by the Firm cannot take more than a combined total of twelve (12) weeks of leave in a twelve (12) month period for the birth, adoption, or foster care.

Military Leave of Absence; USERRA

For federal military service, the federal Uniformed Services Employment and Reemployment Rights Act (USERRA) establishes employment and reemployment protections and supersedes any state or local law, contract, policy or practice, except that provisions more favorable to the employee may be provided by state law, employer policy, or collective bargaining agreement.

For state-level military service under orders of the governor with the Wisconsin National Guard or state defense force, public health emergency service with the state laboratory of hygiene, or National Guard duty under orders of the governor of another state, Wisconsin Statutes s. 321.65 provides job protections similar to the federal USERRA.

Upon request, employees are eligible for a leave of absence to serve in the active or reserve military services of the United States in accordance with applicable law. The Firm complies with the Uniform Services Employment and Re-employment Rights Act (USERRA). This act applies to all employees who voluntarily or involuntarily perform services in the Armed Forces, Army National Guard, Public Health Services, or any other category of service designated by the President in time of war or emergency.

Jury Duty

Russell Law Offices recognizes employee obligations to serve on state and federal juries. When you are asked to serve on jury duty, inform a Managing Attorney immediately. You are expected to take work with you while awaiting your name to be called and to return to work, when reasonable, during your regularly scheduled business hours if released earlier than anticipated.

The Firm will pay full time employees up to two (2) weeks (max 10 days) for jury duty leave. Any jury duty assignment lasting longer than two (2) weeks will need to be discussed with the Managing Attorney. Part time and temporary employees are not eligible for pay for jury duty. Occasionally, employees may be legally compelled to attend a judicial proceeding. In these circumstances, an employee's attendance at work will be excused. Employees must notify a Managing Attorney immediately upon receiving a summons or subpoena compelling attendance at a judicial proceeding and must present the summons or subpoena to a Managing Attorney.

An employee charged with a crime, who is required to attend a judicial proceeding, is not covered by this policy.

Smoking and Substance Abuse

Russell Law Offices is committed to providing a safe and healthy environment for employees and visitors. To accomplish this goal, smoking and the use of other tobacco products may be allowed only during scheduled breaks outside in designated areas consistent with applicable state and local laws.

The Firm is a drug free environment. Specifically, the Firm is committed to having a workplace free from the improper use of narcotics and other controlled substances (commonly referred to as illegal drugs), the abuse of alcohol, and the misuse of legal or prescription drugs. The following practices will be used to ensure a drug free environment:

- No person will be hired who is an abuser, promoter, or seller of illegal drugs.
- Use, presence in the body, sale, distribution, or possession of illegal drugs by employees, while present on any premise or during scheduled working hours, including break or meal periods, is strictly prohibited and is grounds for termination.

- An employee that is found to be involved in the sale, solicitation, or dealing of illegal drugs will be terminated.
- An employee who is taking prescription medication or other legal drugs that might impair their physical or mental faculties should provide prompt notice of this fact to a Managing Attorney. Employees should not report to work under the influence of any drug that creates impairment or a safety risk.
- The unauthorized use or possession of alcoholic beverages on Firm premises, is also prohibited. Reporting to work or working under the influence of alcohol is cause for termination.
- Any current employee who recognizes their own need for counseling or medical assistance due to dependence upon drugs or alcohol may voluntarily contact a Managing Attorney to receive confidential assistance in determining what options are available and ways in which Russell Law Offices may support their recovery.

Voicemail, Email, Internet and Social Media Policy

The voicemail, e-mail, computer systems and/or access to the internet are provided by Russell Law Offices to assist its employees in carrying out the business of the Firm. The Firm treats all messages, received or stored, as business messages to which the Firm is entitled, if deemed necessary, to access, review, copy, delete, or save for any purpose and to disclose them to anyone that the Firm deems appropriate. The Firm may override any applicable password or codes in accordance with the best interests of the Firm, its employees, clients, colleagues or visitors. Employees may not password protect Russell Law Offices' accessibility to computers, voicemail, computer systems, or otherwise prevent the Firm from carrying out the business of the firm.

The Internet is to be used for business purposes only and should not be utilized for personal reasons. Access to pornographic or other inappropriate websites is strictly prohibited. Checking Facebook or other internet social media websites is prohibited during work hours and if necessary, only during lunch or after hours, but not on office computers. Office wi-fi and business devices only are to be used for the Firm's purposes only. If the Employee is uncertain that use is a permissible purpose, the Employee should ask for clarification by a Managing attorney.

Use of voicemail, e-mail, computer systems, or Internet to engage in communications against Firm policy, such as unethical business practices, defamatory, obscene, offensive, harassing or any otherwise inappropriate messages, is prohibited.

All employees are required to use the Firm's branded email signature and approved font selection for all emails. Any other variation of email signatures is not permitted.

All employees must display a high level of professionalism on all social media channels including personal Facebook, Instagram, and Twitter accounts. Social media profiles may be checked regularly by the Firm's staff to ensure compliance.

All attorneys must have/create a LinkedIn Profile that is linked to the RLO LinkedIn page. Attorney LinkedIn profiles will be monitored regularly. Content featured on profiles must be approved by RLO staff before published. Once attorney leaves or is terminated from RLO, employee has 5 business days to remove the RLO curated header from their page and unlink themselves from the RLO company LinkedIn page.

Russell Law Offices has a Facebook page which is managed by the Marketing Manager. This page must be maintained regularly with Russell Law Offices branded posts.

All employees are subject to reimbursement of any damages caused to Russell Law Offices, S.C. whereby the employee was found to be in volition of the terms above.

Non-Standard Office Equipment

Employees shall be issued standard office equipment by Employer for use in the performance of Employees' official duties for Employer. Employees shall be permitted to, at their own cost, substitute non-electronic, Employer-issued office equipment for alternative equipment of the Employee's choosing. However, should Employee elect to utilize alternative office equipment, Employee shall release, discharge, and hold harmless, Russell Law Offices, S.C. from any and all liability, claim and demands of whatever kind of nature, either in law or in equity, which arise or may hereafter arise relating to Employee's use of the non-standard office equipment.

Law Firm Software

Russell Law Offices, S.C. utilizes a Law Firm Software Program called "Smokeball". Russell Law Offices has created guides for employees to utilize when managing contacts, setting tasks, utilizing memos, setting matters, etc. in Smokeball. It is required that all employees follow the processes and procedures of the firm as explained by the Managing Attorney while using this software.

Firm Marketing

Russell Law Offices prioritizes consistent and engaging content for our website, social media, print materials, advertisements, and presentations. Employees may be asked to participate in marketing efforts such as brainstorming meetings, writing blog posts, being photographed or the subject of educational videos. Employees are expected to participate in these efforts as a part of their based salary within the organization.

Employee Disciplinary Actions

Russell Law Offices, S.C. will implement a process of discipline actions against an employee if necessary. Grounds for disciplinary action or termination include blatant disregard of employee codes of conduct, Firm morals, handbook violations and more.

When determining the best course of action regarding the disciplinary process, the Managing Attorney may utilize, and will record in the employee's personnel file, any of the following:

a. Verbal Warning
b. Written Write Up
c. Final Written Warning
d. Termination

Note: The Supervising Attorney and the Managing Attorney can enforce these disciplinary actions. At any time, the Managing Attorney can terminate an employee without preceding disciplinary actions if they feel necessary.

Employee Polygraph Protection Act

Federal and Wisconsin laws prohibit and or restrict the use of polygraph of truth telling mechanisms as a prerequisite to employment. The Employee Polygraph Protection Act of 1988 (EPPA) generally prevents private sector employers from using lie detector tests, either for pre-employment screening or during the course of employment, with certain exceptions. Employers generally may not require or request any employee or job applicant to take a lie detector test, or discharge, discipline, or discriminate against an employee or job applicant for refusing to take a test or for exercising other rights under the Act.

U.S. and Wisconsin Labor and Employment Law Resources

Russell Law Offices S.C. complies with U.S. and Wisconsin labor laws and employment standards. The State of Wisconsin provides labor and employment related resources in the following locations. Should you have any labor related concerns regarding this handbook please contact a Russel Law Office Attorney to discuss your concerns or to access additional resources.

U.S. Department of Labor: https://www.dol.gov/

200 Constitution Ave NW, Washington, DC 20210

1-866-4-USA-DOL

Wisconsin Department of Workforce Development: https://dwd.wisconsin.gov/

201 E. Washington Ave, P.O. Box 7946, Madison, WI 53707

(608) 266-3131

Separation of Employment

Should you decide to resign for any reason, the Firm requests, but does not require, that you provide as much notice as possible.

This notice will allow for a smooth transition of your duties and working relationships.

Prior to your departure, Russell Law Offices may request that you meet with a Managing Attorney or Human Resources to provide work-related feedback on the Firm. This will allow the Firm to continue to evaluate their policies and practices and to improve such policies and practices if possible.

Prior to your departure date, you will be required to return all Firm documents, materials, and equipment. You will also be asked to turn in any outstanding expense reports, if applicable. No materials or documents should be copied or in any way duplicated and taken with you when you separate from employment.

Severance Pay

The Firm may provide severance pay, solely at the Firm's discretion, to employees upon termination of employment not due to job performance issues. Severance pay is taxable income and can be paid out in regular payments or in a lump sum to be determined by a Managing Attorney.

Unemployment

The Firm is able to monitor and control the cost of unemployment insurance by being responsive to regulatory authorities. Typically, employer information must be submitted to the appropriate state office within seven (7) days of request. Failure to respond in a timely manner often results in unemployment compensation awards to former employees who otherwise would not qualify. A Firm Attorney will research each claim as necessary and advise the company on hearing attendance requirements, as well as required materials and presentation

Confidentiality

The Rules of Professional Conduct promulgated by the Supreme Court of Wisconsin extends not only to attorneys, but also to their employees. Pursuant to the Code, a lawyer's work for a client is that of a confidential nature. Consequently, all work in the office is considered confidential and is not to be discussed with persons not associated with Russell Law Offices, S.C. Furthermore, it is not appropriate to discuss a matter in the office with other personnel whose duties do not require knowledge of the matter. It is unethical to reveal to any persons not employed by the Firm that we represent any particular client for any reason without the client's permission.

When talking to a person on the phone, no information shall be provided to a caller unless the employee verifies the person and unless the release of the information is authorized. Also, all employees are cautioned against the use of a client's name when they might be overheard by other clients or other persons who may be in the office. When meeting with clients, files and written material on other clients must be put away and not visible.

All written material containing any confidential client information must be shredded.

Nothing is more damaging to any lawyer, or law firm, than the perception in the community that his/her clients' business is talked about outside of the office.

At times, lawyers must keep sensitive material that may be of a very confidential nature, regarding the Firm, its personnel, the lawyers themselves, or their clients. To avoid accidental violations of that confidentiality in a lawyer's absence, under no circumstances should a lawyer's office or computer be offered for use to a client, vendor, or other unauthorized person without the direct consent of that lawyer, or in their absence, a Firm Attorney.

Debt Collection Policy and Procedures

Policy Statement

Russell Law Offices, S.C. is in the practice of collecting debt on behalf of Russell Law Offices, S.C. and on behalf of Clients. The purpose of this policy is to establish appropriate practices and procedures for employees, agents, and contractors involved in collecting debt on behalf of Russell Law Offices, S.C. and Clients.

The federal government and the State of Wisconsin have established guidelines governing the debt collection activities of creditors, merchants, and third-party debt collectors, such as Russell Law Offices, S.C.

Federal and State Law

The federal government has adopted the Fair Debt Collection Practices Act ("FDCPA"). This Act creates guidelines under which debt collectors may conduct business, defines the rights of consumers involved with debt collectors, and provides

penalties and remedies for violation of the FDCPA. The FDCPA applies to professional debt collectors only and not to creditors such as Russell Law Offices.

Wisconsin has adopted the Wisconsin Consumer Act, which includes "Wisconsin Consumer Act – Debt Collection." Anyone attempting to collect a debt arising from a consumer credit transaction in Wisconsin, whether a merchant doing its own debt collecting or a third-party debt collector, must follow Wisconsin's debt collection law, Ch. 427, Wis. Stat. Compliance with Wisconsin law does not ensure compliance with the federal law and vice versa.

These provisions of the FDCPA and the Wisconsin rules establish good practices for debt collection activities which are incorporated into this Policy.

Procedures

1. Debt Collection Practices. Russell Law Offices Employees, acting on behalf of Our Office, shall conduct debt collection activities in a fair and reasonable manner and shall be entitled to use all lawful means in performing said duties.
    a. The following practices are <u>required</u>:
        i. The Employee must identify himself or herself, disclose his or her relationship with Russell Law Offices, S.C., and notify the consumer, that the communication is from a debt collector, and that any information obtained will be used to effect collection of the debt.
        ii. If the consumer has an attorney with regard to the debt, Employees must inform Our Office. If the party is consumer if represented by their own attorney, the Employee may not communicate with anyone else concerning the debt unless the attorney fails to respond within a reasonable amount of time.
        iii. Notify the consumer of their right to dispute the debt, in part or in full, with the debt collector within five (5) days of the initial communication with the consumer.
        iv. Provide verification of the debt.
        v. File any lawsuit in a proper venue.
        vi. Comply fully with all applicable provisions of the FDCPA and the laws of the State of Wisconsin.
        vii. *<u>In every communication with the consumer ALL EMPLOYEES MUST Identify themselves and notify the consumer that the communication is from a debt collector and inform the consumer that any information obtained will be used to effect collection of the debt.</u>*
2. In its debt collection activities, Employees acting on behalf of Russell Law Offices will not utilize any conduct the natural consequence of which is to harass, oppress, or abuse a person in connection with a debt collection.
    a. The following practices are <u>prohibited</u>:
        i. Contacting consumers by telephone outside of the hours of 8:00 a.m. to 9:00 p.m. local time.
        ii. Failure to cease communication upon request: communicating with consumers in any way (other than litigation) after receiving written notice that said consumer wishes no further communication or refuses to pay the alleged debt, with certain exceptions, including advising that collection efforts are being terminated or that the collector intends to file a lawsuit or pursue other remedies where permitted.
        iii. Causing a telephone to ring or engaging any person in telephone conversation repeatedly or continuously: with intent to annoy, abuse, or harass any person at the called number.

iv. Communicating with consumers at their place of employment after having been advised that this is unacceptable or prohibited by the employer.
v. Contact consumer known to be represented by an attorney.
vi. Communicating with consumers after request for validation has been made: communicating with the consumer or the pursuing collection efforts after receipt of a consumer's written request for verification of a debt and before the consumer is provided with the requested verification or original creditor's name and address.
vii. Misrepresentation or deceit: misrepresenting the debt or using deception to collect the debt, including a debt collector's misrepresentation that he or she is an attorney or law enforcement officer.
viii. Publishing the consumer's name or address on a "bad debt" list.
ix. Seeking unjustified amounts, which would include demanding any amounts not permitted under an applicable contract or as provided under applicable law
x. Threatening arrest or legal action that is either not permitted or not actually contemplated.
xi. Abusive or profane language used in the course of communication related to the debt.
xii. Contact by embarrassing media, such as communicating with a consumer regarding a debt by post card, or using any language or symbol, other than the debt collector's address, on any envelope when communicating with a consumer by use of mail or by telegram, except that a debt collector may use his business name if such name does not indicate that he is in the debt collection business.
xiii. Reporting false information on a consumer's credit report or threatening to do so in the process of collection.
xiv. Falsely implying that the Creditor is vouched for, bonded, or affiliated with the United States or any state.
xv. Falsely representing that a sale, referral or transfer of any interest in the debt will cause the consumer to lose any claim or defense he or she may have.
xvi. Solicitation or acceptance of post-dated checks.
xvii. Depositing or threatening to deposit a post-dated check prior to the date on the check.
xviii. Charging any person for communications by concealing the purpose of the communication (for example, collect telephone calls).
xix. Taking or threatening any non-judicial action such as seizure of property by Russell Law Offices Employees, Agents, Attorneys, or Agents and contracted agencies acting on behalf of the Russell Law Office.
xx. Communicating with a consumer regarding a debt by post card.
xxi. Using any language or symbol, other than the creditor's address on any envelope when communicating with a consumer by mail.

3. Professional Debt Collectors. Russell Law Offices, at its sole discretion, may employ or choose to refer unpaid debt(s) to professional debt collector(s).
4. Training. Russell Law Office will provide appropriate training to all of its personnel engaged in debt collection activities; including Employees, Agents, and Attorneys. The training will include the requirements of the FDCPA and Wisconsin Law as well as this Policy.

Additional Fair Debt Collection Information

Wisconsin: https://www.wdfi.org/wca/business_guidance/creditors/debt_collection/default.htm

FDCPA: https://www.ftc.gov/system/files/documents/plain-language/fair-debt-collection-practices-act.pdf

Credit Reporting Policy and Procedures

Russell Law Offices complies with the laws of the State of Wisconsin and with the Federal Fair Credit Reporting Act (FCRA). Information compiled by, used by, or produced by Russell Law Offices may be related to or be used by Russell Law Office or Clients pertaining to matters governed by the FCRA, including but not limited to: Debt Collection, Employment, and Legal Services. Russell Law Offices maintains this Credit Reporting Policy to maintain compliant practices with U.S. Federal Law and the laws of the State of Wisconsin.

Policy Summary

The Fair Credit Reporting Act regulates the consumer credit reporting and related industries to insure that consumer information is reported in an accurate, timely, and complete manner to give individuals information when consumer reports are used to evaluate credit applications and to protect the confidentiality of information. The Fair and Accurate Credit Transaction Act (The FACT Act) amends the FCRA, establishing numerous requirements that provide protection for the victims of identity theft, provide more information to consumers about credit reports and credit scoring, limits sharing of information with affiliates, and protects consumer medical and other information.

Covered Information

The Fair Credit Reporting Act defines the term consumer report to include information obtained from a consumer reporting company that is used – or expected to be used – in establishing a consumer's eligibility for credit, employment, or insurance, among other purposes. Credit reports and credit scores are consumer reports. So are reports businesses or individuals receive with information relating to employment background, check writing history, insurance claims, residential or tenant history, or medical history.

FCRA Policy

Russell Law Offices may come into contact or receipt of Covered Information under and including, but not limited to, the following situations:

- While onboarding or initiating representation of a Client or related Matter;
- Debt collections undertaken by Our Office;
- Legal Services provided to our Clients;
- Litigation and or Discovery of Matters;
- Pursuant to the provision of Our other Legal Services; and or
- In Our role as an Employer.

Our Clients may, due to their status as financial institutions, government agencies, and or under other applicable legal regimes or requirements, be required to follow heightened FCRA reporting, retention, and or documentation requirements. Russel Law Offices may retain, destroy, and or manage documentation provided by or for such Clients pursuant to their compliance needs.

Russell Law Offices complies with the requirements provided for retention and protection of sensitive Client data pursuant to the State of Wisconsin Rules of Professional Conduct for Attorneys.

Disposal of Covered Information by Russell Law Offices

Russell Law Offices uses disposal practice and follows procedures to prevent the unauthorized access to – or use of – information in a consumer report. Russell Law Offices uses the following internal procedures to protect and destroy documents containing Covered Information:

- Use and Maintenance of locked filing systems for paper documents and files.
- Firewall, password protected, local-drive, and remote server protected filing systems for digital data, documents, and materials.
- Scheduled shredding services for all paper documents, drafts, or filed not retained by a certified third party.

Russell Law Offices takes the safety and privacy of Client information and Covered Information retained, created, or recorded for Russell Law Offices or Client purposes seriously when maintaining the security of paper and digital documents and data.

Additional Fair Credit Reporting Information

FCRA: https://www.consumer.ftc.gov/articles/pdf-0096-fair-credit-reporting-act.pdf

Law Firm Software Program Procedures and Policies

Leads

Client leads may come into the Firm via phone calls, walk-ins, emails, and web inquiries. A lead or matter must be created in the platform for each potential client. Each lead is also required to be completed accurately in our system. If the client is already in our system, add the matter under the existing contact. A complete lead includes contact information, the case information, and the referral type. This is required.

Intake Process

The minimum intake process is outlined in the Intake Process Guide. This is the minimum information required to capture from the potential client. Each attorney may have greater expectations for their intake process, and each legal assistant is expected to abide by their Supervising Attorney's recommendations.

Closing a Matter/Non-Representation

When an Attorney has closed a lead via "non-representation" or no longer represents the parties in a matter, a closing letter/non-representation email will be sent to the potential client/client from the Attorney. Closing letters will come directly from Attorneys to clients, opposed to sending an email from the Legal Assistant. It is expected that Attorneys use the Firm's template for closing letters which includes a Google Business Review link in the body of the letter. If retainer funds are due back to the client – notify the Human Resources Department to issue the refund. If the client owes the Firm money, funds need to be collected as soon as possible. The Attorney and the Legal Assistant are responsible for efforts in collecting past due funds. Once the account has a zero balance, CLOSE the matter in Smokeball.

Documentation

Russell Law Offices employees often work collaboratively thus making all materials accessible is critical to time management and effective employee collaboration. All documentation including files, emails and correspondence for all matters must be uploaded to the platform in an accurate and timely matter. Employees are prohibited from storing client files on their hard drives, servers or computers instead of the Law Platform.

Representation Agreements

Each client is required to sign a representation and fee agreement prior to service. Once the signed representation agreement is returned, the Evergreen agreements must be enabled on Smokeball. Additionally, all hourly rates must be assigned accurately per the representation and fee agreement. A representation agreement is the only binding contract to ensure Russell Law Offices is paid for its services. There will be consequences for those who do not follow this procedure.

The following information is required to be input into Smokeball:

- Evergreen Assignments
- Hourly Rates for all Legal Assistants & Attorneys
- File Creation Fee (if applicable)
- Other requirements as provided by Managing Attorney

CONFIDENTIALITY AGREEMENT AND RECEIPT AND ACKNOWLEDGEMENT

I am employed by Russell Law Offices, S.C. I have read and I understand the terms and conditions of the Firm's Employee Handbook, including its office confidentiality section. I understand that the documents and information I will be handling in the course of my work for the Firm are very confidential in nature. The Wisconsin Supreme Court Rules of Professional Conduct, which governs the activities and responsibilities of lawyers, require that lawyers protect their client confidences and secrets. In most circumstances, it will also be inappropriate to reveal the identity of the Firm's clients or that the Firm is in receipt of instructions from any named client. This is particularly the case in litigation. In many instances, the Firm or client confidential information should not be disclosed to other Firm lawyers or employees. Client or firm confidential information must not be disclosed to any lawyer or Firm employee who is not entitled to the information, or to anyone, including family members, either during or after my employment by the Firm.

I therefore unconditionally and unequivocally agree to keep all confidential documents and information I receive or develop in the courses of my work for the Firm and for each respective client. I will not discuss my work with anyone other than the personnel at the Firm and designated client personnel as instructed by each responsible lawyer. I will make sure that any work-related communication between me and Firm personnel, and between me and Firm clients, is kept confidential and is not communicated to third parties.

I will not make copies of client or Firm documents, including computer files or other electronic media, without first obtaining permission from the responsible lawyer for the client or office matter.

I also understand that outside of client matters, I agree to keep confidential all policies and procedures, Firm business, events within the Firm, and my personnel information confidential. I agree to abide by the terms of this Confidentiality Agreement both during and after the termination of my employment with the Firm. I acknowledge receipt of a copy of this Confidentiality Agreement.

I have received a copy of the Employee Handbook and have read or had it read to me. If I have any questions regarding this manual, I understand that it is my responsibility to ask a Firm Attorney about them. I recognize it is my responsibility to review the policies, practices, standards, and rules it contains, and I agree to comply with them during my employment.

I understand the information in this manual is intended to acquaint employees with general policies, principles, standards, and procedures, and does not represent a contractual commitment by the Firm concerning terms of employment or other matters. The Firm is free to act according to the best business judgment of management and to change, interpret, withdraw, or add to the policies, procedures, and standards described in this manual at any time without prior notice, consideration, or approval by an employee. I further understand that this handbook is not a contract between the Firm and me, nor is it a guarantee of any specific policies, procedures, standards, rules, or length of employment. I understand that my employment is considered "at-will".

Employee Signature: _____

Employee Name: _____

Date: _____

Russell
LAW OFFICES, SC

AI Policy | Last Updated: January 2026

I. Introduction

We acknowledge that Artificial Intelligence (AI) is making swift and significant impact on the legal industry both globally and locally. The goal of Russell Law Offices, S.C. is to establish a clear AI policy focusing on ethical considerations, implementation strategies, and staff education.

II. Understanding AI in Legal Practice

AI in the legal context includes tools such as generative AI, predictive analytics, legal research automation, and AI-driven client service chatbots. When AI is used in these materials it is a reference to all of these different subsets of AI. These tools offer benefits like improved efficiency and accuracy in drafting documents, predicting litigation outcomes, and automating legal research. However, there are ethical and practical concerns, including bias in AI algorithms, client confidentiality risks, hallucination risks, and the need for lawyer supervision.

III. Ethical Considerations and ABA Formal Opinion 512

Attorneys at RLO are hereby made aware of the ABA Formal Opinion 512 that addresses the use of AI in legal practice: Although not always required, lawyers should consider disclosing AI use in engagement letters and always ensure human oversight to verify AI-generated outputs. This approach not only upholds ethical standards but also fosters trust and transparency with clients.

All AI usage must comply with Wisconsin Supreme Court Rules Chapter 20, including but not limited to:

a. **Rule 1.1 – Competence**: Lawyers must understand the benefits and risks inherent in the technology they use or seek assistance to help them understand. This means that lawyers need to have a basic understanding of how AI tools work, their capabilities, and their limitations. They should also be aware of the potential risks associated with AI, such as bias, hallucinations, and basis of source information on model training, and take steps to mitigate these risks.

b. **Rule 1.6 – Confidentiality**: AI tools must not compromise client confidentiality. Lawyers need to ensure that the AI tools they use have robust security measures in place to protect client data. They should also be aware of the data privacy laws and regulations that apply to their practice and ensure that their use of AI complies with these laws.

c. **Rule 1.4 – Communication**: Clients should be informed when AI is used in their matters. Transparency is crucial in maintaining client trust. Lawyers should disclose the use of AI in their engagement letters and explain how AI will be used in their

matters. They should also be prepared to answer any questions clients may have about the use of AI.

d. **Rule 1.5 – Fees**: Billing for AI-assisted work must be reasonable and transparent. Lawyers should ensure that their billing practices reflect the use of AI and that clients are not overcharged for AI-assisted work. They should also be transparent about how AI is used to enhance efficiency and reduce costs. Law firms must never bill for time-saved by using AI or any other technology that improves efficiency.

IV. Training and Supervision

Supervision protocols ensure human review of AI-generated content, assign clear responsibility for AI-related decisions, and create protocols for addressing errors or misuse of AI.

Law Firm Generative AI Policy

1. Purpose and Scope

This policy outlines the ethical and operational guidelines for the use of generative Artificial Intelligence (AI) tools within RLO. It applies to all staff, contractors, and affiliates who use AI technologies in the course of legal practice. The goal is to ensure compliance with ABA Model Rules, protect client confidentiality, and maintain professional standards.

2. Ethical Standards

Lawyers must understand the capabilities and limitations of AI tools and ensure they do not replace professional judgment.

3. Attorneys MUST verify all AI-generated outputs before use in client matters.

Checklist:

a. Have you reviewed the AI tool's accuracy?
b. Is the output verified by an attorney?
c. Are clients and courts informed when required on whether Generative AI is used?

4. Data Protection and Confidentiality

AI tools must not be used to process or store client data unless the tool complies with data protection laws, best practices, and confidentiality requirements. Reasonable efforts will be made to ensure that the vendor meets secure data handling practices. Implementation Tip: Maintain a list of approved AI tools and their data handling policies.

5. **Client Consent and Transparency**

   All fee agreements must include the following language:

   "We may use AI tools to assist in your matter. These tools have been selected after careful investigation by the firm and allow the firm to provide quality, efficient legal services to you. You have the right to request information on how these tools will be used with your matter."

6. **Human Oversight and Verification**

   All AI-generated content must be reviewed and verified by an attorney before submission, filing, or delivery to a client. AI should always assist, and never replace, a lawyer's professional judgement.

   AI output created by a law clerk or associate for another attorney must be noted to and verified by the supervising attorney before using anything is submitted to a client or a court. AI should assist, not replace, legal analysis or research. This supervision extends to 3rd party vendors, outside counsel or co-counsel, and service providers (i.e. expert witnesses) that are used in connection with a client matter.

7. **Training and Education**

   All staff must complete annual training on ethical use of AI and compliance. Staff must receive training on ethical AI use, including benefits, risks, limitations, and compliance requirements. Training should be updated and noted in the employee file annually.

8. **Incident Response and Accountability**

   Any misuse or violation of the AI Policy must be reported immediately to the managing attorney immediately upon learning of the incident. The firm will investigate and take corrective action as necessary.

9. **Authorized Tools and Usage**

   Only approved AI tools may be used. The firm maintains a list of authorized tools and their intended uses.

   The following AI tools have been vetted by the firm and are authorized for use:
   Smokeball [Archie] and **Westlaw**.

Use of unapproved AI tools is strictly prohibited. The following uses are of AI tools is prohibited: ChatGPT, Google Gemini, Claude, or other similar public general-purpose AI chatbots.

10. <u>Policy Review and Updates</u>

This policy is reviewed annually by the RLO Managing Partners and updated as needed to reflect changes in technology, law, and ethics.

Employee Signature: _____

Employee Name: _____

Date: _____

Russell Law Offices Lawyer Structure

Last Updated: September 15, 2024

Associate

- 0-7 years of experience
- Base salary range - $70,000-$100,000 – for first $17,500 a month
- Tiered bonus structure based on per month production
    - 1st $4,000 in earnings above minimum – 50%
    - All additional hours/earnings above – 65%
- 401(k) contribution of up to 5%+ if company profit sharing is met.
- $1,000 annually towards CLE
- Unlimited vacation if hit monthly minimums

Senior Associate

- 3-15 years of experience
- Base salary range - $90,000-$135,000
- Salary + 50% & 65% above minimums
- 401(k) contribution of up to 6% if company profit sharing is met.
- Paid WisBar Disability Insurance
- $1,000 annually towards CLE & Travel with approval of supervisor
- Unlimited vacation if hit monthly minimums

Partner

- Salary guaranteed and not tied to bonus or hours worked
- Must have at least 12 months at Russell Law Offices, SC
- Need to bring in at least $325,000 annually
- Base Salary Range - $140,000-$225,000
- 5-15 years of experience
- Entitled to Profit Sharing from regional area pool (Share in 10-25% of Net of that area)
    - Can qualify from up to two different regional areas but can only qualify for 1 total share
    - i.e. (60% of a Western and 40% of Central)
- 401(k) contribution of up to 8% if company profit sharing is met.
- Paid WisBar Disability Insurance
- $4,000 annually towards CLE & Travel

Tier 4 – Senior Partner

- Non-ownership Partner but gets Profit Sharing – No buy-in required
- Base Salary Range - $175,000-$250,000+
- Must have at least 3 years at Russell Law Offices; Preferably at least 7 years.
- Share in 10-30% of Net Profit
- Need to bill at least $325,000 annually
- First 10 partners selected by President
- All other partners selected by Partnership committee
- Partners receive first opportunity to purchase firm upon sale
- 401(k) contribution of up to 10%
- Paid WisBar Disability Insurance
- $5,000 annually towards CLE & Travel

Additional Benefits

- All attorneys qualify for student loan forgiveness of up to $5,250/year
- All Senior Associates and higher shall have a dedicated assistant to them within 6 months of reaching status
- All Partners will at least share an associate
- All attorneys qualify for Premium health insurance coverage
- Travel Incentives opportunities throughout the year

STILL IN DEVELOPMENT:

Additional Titles/Compensation

- Practice Area Leader/Chair
    - Collections/Business/ Municipal/Real Estate
    - Criminal/Family Law
    - Estate Planning/Probate
    - Civil Litigation/Personal Injury/Disability
- Summer Associate Supervisor

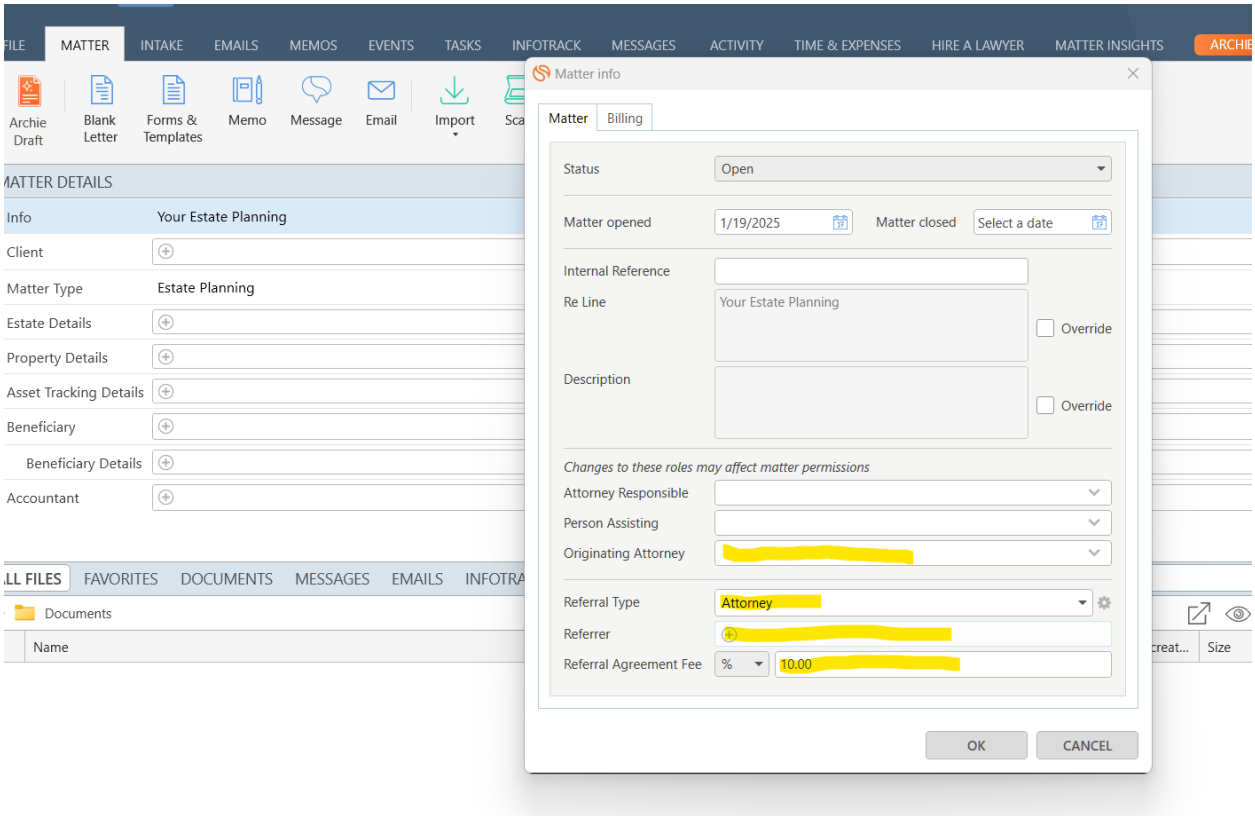
Attorney Referral Policy

January 20, 2025

In order to encourage younger attorneys to refer matters to other attorneys in the firm RLO is establishing a Referral Policy. This is geared towards Associates and Senior Associates as Partners and Senior Partners share in the profits of the company. Any Associate who refers a case to another RLO attorney shall receive 10% of the total amount paid by the client . For example, if a divorce client is referred to another attorney for estate planning work that leads to an invoice of $850 will lead to a bonus of $85 for the referring attorney. This program shall have no impact on the work that is being completed by the assigned attorney completing the work.

Payments will only be made upon payment being made to RLO. The payment will be made during the second payroll of a month. Payment for services has to be made at least four days prior to the payroll for it to be applied. Otherwise, it will be held over to the next month.

In order to obtain credit the highlighted information needs to be completed as shown below in Smokeball.



This policy does not apply to personal injury matters.

Compensation Addendum to Employee Agreement

This Compensation Addendum to Employee Agreement (the "Compensation Addendum") is hereby made as of the date of signature to the signature of the Employee Agreement (the "Agreement").

The Employee shall receive the following compensation while employed by the Employer:

- Salary shall be set at $85,000 for first $17,500 billed in a month. Hourly billable rate is estimated to be $275/hour except as may already be contracted at a lower rate; Flat fees matters will be allowed and applicable in the same manner as hourly
- Vacation/Personal Time as Employee deems necessary while still maintaining $17,500 billed in a month
- Monthly Incentive pay for hours over $17,500 as follows: First $4,000 over $17,500= 50% of billed time
- Any additional earnings over $21,500 = 65% of billed time
- Bonuses are paid a month and one payroll after the month they are billed (Client is billed in March the bonus is paid the first payroll in May)
- Employee also gets 10% of paid attorney fees for any client he refers to another attorney in the firm paid quarterly

Additional Compensation

- 100% payment of health and dental insurance for Employee; 70% for dependents; If no insurance is taken Employee shall receive $135.42 per pay period.
- $45/month reimbursement for cell phone paid quarterly
- 3% 401(k) contribution with up to an additional 3% in profit sharing if company requirements are met
- Paid Bar membership and malpractice insurance
- Up to $500 a year towards Continuing Legal Education (CLE) credits upon approval of supervisor
- Up to $5,250 towards student loan forgiveness

Requirements for employment:

- Wisconsin Bar license

Policy regarding contingency fee cases

Created November 4, 2022

Last Modified March 19, 2023

Participation in contingency fee case work will be completely voluntary for RLO attorneys at this time. Hours worked on contingency cases will not apply to any minimum billable hour's requirements and will not be counted when determining bonuses at any time. Attorneys participating in contingency fee cases are still expected to hit minimum required billable hours monthly as directed by their supervising attorney and directed by any employment agreement. Attorneys will be assigned to work on such cases based upon their experience, work load and familiarity with type of case. The Managing Partner will make such assignments at this time based on those attorneys who state they are interested in working such cases.

All contingency fee cases must first be approved by the managing partner prior to acceptance. RLO will collect its reimbursable costs first. RLO will then receive 40% of the recovered amount. The referring attorney, whether a member of RLO or an outside attorney, will received 15% of any recovered amount. The remaining recovered amount will be divided between all attorneys who actively work on the case on a weighted pro rata basis. All attorneys working a contingency fee case shall document the time working on the case as unbillable time. If there no referral person, RLO will receive 45% of the recovered amount and 55% will be divided prorata between the attorneys working on the matter.

This policy is in effect for all new contingency cases accepted by RLO after the date of creation.

Turke & Steil S.C.

SMALL FIRM & SOLO PRACTITIONER CONFERENCE · OCTOBER 2026

Taking Care of Your Firm So You Can Sleep at Night

Mary C. Turke

1

FRAMING

Why This Matters

Solo and small-firm attorneys carry the caseload *and* run the business.

- Every technology, staffing, and marketing decision lands on one desk
- Get these four systems right, and the firm runs without you personally holding every piece together

2

TOPIC 1

Technology & Infrastructure

Document Management

Document management — every matter's files, versions, and communications in one searchable place

Practice Management

Case & matter tracking — dashboards the whole team can see, no constant status check-ins

AI Tools

Drafting, research & review support

Bottom line: invest in technology — it pays for itself in time saved and risk reduced.

TOPIC 2

Non-Attorney Growth & Hiring

Interns

Intake, collections, and reception — lower cost, professional development

Paralegals

Delegate substantive, non-attorney work to free up attorney time for higher-value matters

Discussion: what's worked — and what hasn't — for you?

TOPIC 3

Attorney Growth & Hiring

Highly firm-specific — no one-size-fits-all approach. Here's our benchmark:

1/3	1/3	1/3
Compensation	Overhead	Profit

Gut-check: will this hire's expected receipts realistically clear that bar?

We've also brought on senior attorneys on a revenue formula basis, paid as a percentage of receipts — a lower-commitment way to add experienced help.

PROTECT YOUR PROFIT MARGIN

TOPIC 4

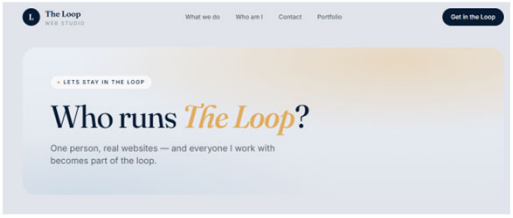
KPI & Advertising

SEO searching, google ads – but what helps the most is a *clean, impactful website.*

Also hire “digital natives” for social media and LinkedIn

Shameless plug:

https://loopwebstudio.com/about



Turke & Steil S.C.

Technology, staffing, and marketing are all systems.

Get them right, and the firm runs without you white-knuckling every decision.

Pick one idea from today and try it this quarter.

Questions & discussion

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