How to Launch a New Practice Group at Your Law Firm: A 7-Step Guide from Preparation to Liftoff

So, you're really doing it. Like only a fearless adventurer can, you've committed to exploring a strange new galaxy of law, to seeking out new clients and embarking on new quests. You're all strapped in and ready to boldly go where, well, at least *your* firm has never gone before.

The good news is that launching a new practice group is nowhere near as terrifying as launching a rocket into outer space. Where you're going, there will still be plenty of oxygen and, therefore no need for any of those bulky, pressurized suits that make it rather difficult to interact with clients.

You will, however, encounter various alien life forms, including unfamiliar bodies of law, terminology, client needs, and subcultures of the legal profession. But you're not alone in this universe. Countless California law firms have successfully completed this mission before, and many have relied on CEB's decades of experience, extensive course catalog, and roster of renowned experts to guide them through it.

We've got you covered. Below is CEB's step-by-step roadmap for taking your practice group from conception to completion. It's time to prepare for launch.

Step 1: Do Your Research

You wouldn't take on a new client without considering the strength of their case. It would be equally unwise to launch a new practice group without first analyzing the decision from all angles. To help ensure you're making the right move, ask yourself the following questions related to market demand, strategy, competition, risk assessment, and potential clients:

Market Demand

- [ ] Is there a demonstrated demand for services in your proposed practice area?
- [ ] Are there emerging legal trends or regulatory changes driving demand for specialized expertise in this area?
- [ ] How saturated is the market in this practice area, and what opportunities exist for differentiation?

Strategic Fit

- [ ] Does the proposed practice area align with your firm's overall strategic goals and areas of expertise?
- [ ] How would the practice group complement existing service offerings and client base?
- [ ] Would the new practice group contribute to your firm's long-term growth and profitability?

Competition

- [ ] Who are the key competitors offering similar services in the market?
- [ ] What are the strengths and weaknesses of those competitors?
- [ ] How can your firm differentiate itself and establish a unique value proposition?

Risk Assessment

- [ ] What are the potential risks and challenges associated with launching the proposed practice group, including financial, reputational, and operational risks?
- [ ] How can your firm mitigate these risks?
- [ ] Are there any regulatory or compliance considerations to address?

Potential Clients

- [ ] Is there a sufficient client base for the proposed practice group, either within your firm's existing client roster or in the broader market?
- [ ] What are the specific needs and challenges of potential clients?
- [ ] How can the firm attract and retain clients for the new practice group, and what strategies can you employ for client acquisition?

If the benefits of launching the new practice group outweigh the costs, you're onto something. If not, consider additional avenues for business within your current focus or explore a different practice area. Try targeting an area of law that overlaps with your current focus. For example, trusts and estates work dovetails nicely with family law, while real estate law has synergies with contract law. Combining two complementary practices will encourage organic growth without your firm straying too far from its core competencies.

Step 2: Make a Plan and Allocate Resources

Now that you've decided on your focus, your answers to the above questions can help you create a business plan and allocate your resources.

First, define your objectives and goals by identifying the target market and establishing long-term aims for the new practice group. Then identify your path to success by outlining strategies for client acquisition, service delivery, and growth. In addition to defining your vision and strategy, determine what resources you'll need to support the new practice group. This should include personnel, technology, and budget considerations.

Financial planning is crucial. Just like opening a new law practice, expanding into a new practice area will require investment and take time to generate returns. This means you'll need to have the financial and organizational discipline to budget for lean months and set aside cash for reserves in flush months.

In addition, notify your malpractice carrier that you're expanding into a new practice area to ensure appropriate coverage and compliance with insurance requirements.

Step 3: Grow Your Knowledge and Skills

Under the California Rules of Professional Conduct, any attorney lacking the necessary knowledge and skills to represent a client in a case is obligated to either:

- **Decline representation.**
- **Refer the matter out.**
- **Associate with another attorney believed to be competent.**
- **Acquire sufficient knowledge and skills before performance in a case is required — provided they have the time, resources, and ability to do so.**

When expanding your focus, you may have an initial dearth of hands-on experience or familiarity with your new practice area, so this obligation underscores a significant concern. In some practice areas, such as family law, a lawyer with 35 years of experience might view an issue as a thorny problem to solve, whereas a casual practitioner in the field might not appreciate the life-changing implications of a decision or action for the client over the following decades. All areas of practice are not equal, and the amount of skill and experience necessary to discharge one's duty competently varies depending on the task.

Aside from "learning by doing" on a case-by-case basis, there are various ways to get up to speed on your new practice area.

Find a Mentor

Establishing a relationship with one or more experienced attorneys who can answer practical questions or otherwise act as mentors can be immensely helpful when expanding your practice. This will give you a baseline understanding of what's expected in the field and provide important firsthand contact with other practitioners in the area before you take on clients.

You've likely formed friendly or mentoring relationships with other attorneys and even opposing counsel throughout your career. These individuals should not be overlooked as possible mentors to call on for practical advice on cases.

Legal consultants, advisers, and other subject matter experts can provide strategic insights, market analysis, and best practices tailored to the specific needs of your new practice group. Establishing contacts with an experienced paralegal or legal secretary in this practice area can also be valuable in learning about local practice rules.

Take Continuing Legal Education Classes

The most challenging aspect of launching a new practice group is that you simply don't know what you don't know — and that's why CEB exists. With the most extensive library of California practice guides on the market, we've curated a catalog of legal research, sample forms, guidebooks, in-depth strategy notes, and checklists, plus thousands of hours of on-demand MCLE videos to help attorneys acquire knowledge and skills specific to their practice area and locality.

CEB's resources and training programs can help you fulfill licensing requirements and stay informed about relevant statutes, case law updates, and procedural rules. Our CLE courses also facilitate networking, collaboration, and the exchanging of ideas and best practices.

Here are three ways to take advantage of CEB's offerings when launching a new practice group:

01

Review Secondary Sources, CEB Practice Guides, or Practitioner™ to find answers to basic questions.

02

Watch CLE courses here to gain insights from experienced practitioners to learn the lingo and strategy (CLE Passport™ offers unlimited on-demand access.)

03

Read cases and study regularly. (It's said that it takes 10,000 hours to be an expert in anything!)

Follow Industry News

Another way to continually build upon your knowledge, understand key trends, and anticipate client needs in your new practice area is by keeping up with the latest industry news and developments. CEB's Daily*News* covers more than 30 practice areas with takeaways and practical insights for attorneys.

CEB's team of 30 in-house expert authors and editors are leading practitioners and scholars in their fields. They ensure our content is accurate, up to date, and free of commercial bias. We also collaborate with a vast network of contributing authors, who include practicing attorneys and judges across California.

> *CEB's team of 30 in-house expert authors and editors are leading practitioners and scholars in their fields.*

Join Professional Organizations and Industry Associations

In addition to CEB, look for relevant industry associations, as well as state and county bar associations offering resources, networking opportunities, and educational programs tailored to your new practice area. Participating in their training programs and meetings is a great way to build relationships with other attorneys, helping you foster positive working relationships and build your visibility in a new market.

Individual sections within these organizations often maintain listservs where attorneys can post hypothetical questions or referral requests and get feedback from experienced members. In some respects, this is akin to hundreds of associates interacting with counsel on common issues, such as how to count service/response days or other garden-variety questions. If your question is reasonably put, many participants will likely respond and give significant back-channel (nonpublic) help. You might want to join a large and active forum and simply observe the issues raised and resolved. For example, the Los Angeles County Bar Association Family Law Section has a significant proportion of active listserv members from outside Los Angeles County.

If your practice area has a specialty administered by the California State Bar Board of Legal Specialization, find out what continuing education and social events that specialty group may sponsor. Mixers and other networking opportunities sponsored by county bar sections could yield potential mentors.

You could also meet experienced potential mentors via pro bono or other volunteer activities, sometimes sponsored by local bar associations. In addition, most county bars have a "barristers" section for new attorneys. The American Bar Association also maintains a section on its website devoted to the sole practitioner.

Many law school alumni associations have annual or other social events connecting alumni and the schools' instructors. The events and informational newsletters associated with this offer a potential avenue for finding mentors.

Step 4: Appoint Leadership and Build a Team

Who will be part of your new practice group, and what qualifications and experience will they need to have?

Leadership will play a crucial role in setting your practice group's vision, strategy, and direction, as well as providing guidance and mentorship to team members. Likewise, a talented team of attorneys and support staff is critical for executing the practice group's objectives and delivering high-quality services.

So, who will be part of your new practice group, and what qualifications, experience, and perspectives will they need to have? When building your practice group:

Appoint experienced attorneys to serve as leaders — ideally, individuals with subject matter expertise and leadership skills who are also good mentors and marketers with a passion for the practice area.

Recruit additional team members as needed, considering both internal talent and external hires. Explore opportunities for strategic partnerships or alliances with other law firms or individual practitioners possessing the requisite expertise.

Obtain buy-in from everyone involved. It's better to have a small team that is fully committed to the practice group's success than a large team that is disengaged or spread too thin.

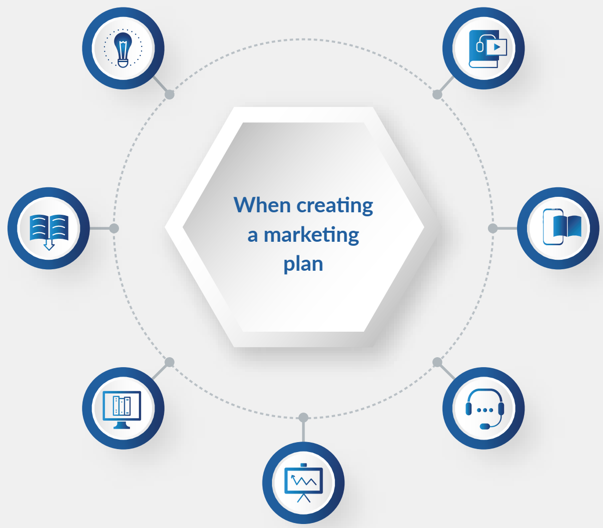
Assign responsibilities to each team member and empower them to contribute to the group's marketing plan and business development activities, get involved with industry trade groups, and enhance relationships with existing clients and referral sources.

Foster a culture of continuous learning and improvement by encouraging collaboration and knowledge sharing. Offer specialized training sessions, workshops, and seminars focused on the practice area's key principles, regulations, and nuances. Pair attorneys with mentors who have subject matter expertise to provide guidance and support.

Step 5: Develop Branding and Marketing materials

If a new practice group launches at your law firm, but nobody's actually heard about it, did it even really launch?

It's rarely a lawyer's favorite thing to do, but creating a marketing plan — or actively participating in its development, if resources allow for professional assistance — will help your practice group establish an identity and presence in the marketplace that will differentiate it from competitors and attract attention from potential clients. Effective marketing materials communicate what's unique and most valuable about the practice group, highlighting its expertise, experience, and areas of specialization. This can help to generate interest, leads, and business growth.



Develop a compelling brand identity and marketing strategy. This might include creating a distinct name, logo, and visual identity for the new practice group.

Write a practice group description — and keep it simple and concise, using language that demonstrates the firm's expertise. Plan to develop case studies demonstrating relevant achievements as they occur.

Add the new practice group to your website and consider featuring it prominently on your homepage.

Establish the firm and its attorneys as thought leaders in the new practice area through articles, blog posts, publications, online commentary, speaking engagements, panels, and industry forums.

Update your information in legal directories and social media accounts.

Alert current and former clients of your new practice group through email announcements and informal conversations. Consider snail-mailing formal announcements to both clients and prospects.

Tailor all marketing materials to your target audience, highlighting the unique value proposition of the practice group.

Remember, it will take time to establish yourself in the new practice area, so patience and persistence are key. Evaluate your marketing plan regularly to make sure you are using the best and most effective ways to promote your firm.

Ethical Considerations

The practice of law, while a business, is traditionally seen as distinct from other types of commercial enterprises, with the protection of the public and dignity of the profession being key considerations in how attorneys present themselves. Although outright advertising of legal services has been permitted for several decades, attorneys still must keep in mind that ethical rules govern the marketing of their services.

The primary sources of regulation for attorney advertising are:

- Bus & P C §§6150–6159.2;
- The California Rules of Professional Conduct, particularly Cal Rules Prof Cond 7.1, 7.3, and 7.5;
- Bus & P C §§17000–17101;
- Ins C §1871.7; and
- Lab C §139.45.

> *...attorneys still must keep in mind that ethical rules govern the marketing of their services.*

Referral Panels Maintained by Local Bar Associations

Many county bar associations maintain referral panels that the general public can use for assistance with their cases. Newer attorneys — usually after paying a fee and confirming that they maintain a certain level of professional liability insurance coverage — can join these panels. Some bar associations have a general panel that both less experienced and veteran attorneys can join, along with separate panels in specialized subject areas, such as estate planning, family law, and criminal law. Participation on specialized panels usually requires either more years of experience or certification as a specialist by the California State Bar Board of Legal Specialization.

County bar associations often have arrangements with their respective superior courts to establish panels of attorneys from which referrals can be made to handle special types of cases. For example, there are panels for the appointment of attorneys to represent minors in child custody and juvenile dependency matters, as well as to represent defendants in criminal cases. To participate in these panels, an attorney usually must have experience in the practice area involved, although there may be opportunities for attorneys new to a practice area to represent litigants in certain types of cases, such as misdemeanor or traffic offenses. In appointed cases, attorney fees are normally set by the court and often are under $100 per hour.

Step 6: Establish Operational Processes

Your new practice group will function smoothly only if you implement the procedures, protocols, and workflows necessary to deliver high-quality legal services effectively.

Identify core operational areas:
Define key areas such as case management, client intake, document handling, and billing.

Develop standardized processes: Create clear procedures and protocols for each operational area to ensure consistency and compliance with legal and regulatory requirements.

Establish communication channels:
Create open means for communication and collaboration to enable seamless coordination among team members.

Incorporate technology:
Implement software and tools to streamline operations, improve efficiency, and facilitate collaboration among team members.

Regularly review and refine processes:
Continuously evaluate operations based on feedback, performance metrics, and changing business needs to drive continuous process improvement and optimization.

Assign responsibilities:
Clearly define roles and responsibilities within the practice group, ensuring accountability and effective task management.

Step 7: Soft Launch and Engage Clients

Think you're ready? The best way to test your operational processes and gather feedback before fully launching is to gradually introduce your services to a select group of clients or contacts.

For a soft launch, reach out to existing clients and prospects via emails, phone calls, and in-person meetings to inform them about the new practice group and discuss how it can address their needs. Seek feedback, listen to any concerns, and incorporate this input into your service offerings and marketing strategies.

By conducting a soft launch that prioritizes client engagement in this way, you can help ensure the successful rollout of your new practice group while also nurturing lasting relationships with clients.

Beyond the soft launch, be sure to seek continuous improvement and feedback from clients and team members. Encourage your team to identify areas for enhancement and innovation, and to share best practices and lessons learned. Regularly review operational processes, client feedback, and performance metrics to identify strengths, weaknesses, and opportunities.

By establishing a culture of continuous improvement, your practice group will be well positioned to adapt to changing market dynamics and stay ahead of the competition.

You're Ready for Launch

As you prepare to plant your flag in a new area of law, you can expect to face unfamiliar terrain, technical challenges, and other hazards. After all, in the spirit of something President John F. Kennedy once said, lawyers launch new practice groups not because it's easy but because it's hard.

With the right combination of careful planning, strategic networking, effective marketing, and continuous learning, when you reach your destination and look back at how far you've come, it will be something to behold.

> *...do the other things, not because they are easy, but because they are hard.*
>
> *– President John F. Kennedy*

Conclusion

CEB is here as a partner in your firm's quest for growth and excellence. The wealth of resources, from must-have content, legal research and practical guidance, to continuing education, underscores CEB's commitment to your success.

We invite you to further explore how CEB can help guide your path to launching a successful new practice group. Visit us at [ceb.com](ceb.com) to discover the resources, support, and guidance available to transform your vision into reality. See how in a quick demo.