

August 31, 2020

Honorable Valerie E. Caproni  
United States District Judge  
Southern District of New York  
40 Foley Square  
New York, New York 10007

Re: ***Chevrestt v. Barstool Sports, Inc. (1:20-cv-1949-VEC)***

Dear Judge Caproni:

In compliance with the Court's order, I respectfully submit that I have completed the following CLE programs:

- 1) *Ethical Law Office Management for Solo Practitioners*
- 2) *Flying Solo: Managing Your Practice, Your Team, and Your Finances*
- 3) *Litigation Issues for Small Law Firms and Solos*
- 4) *Transforming a Solo Practice with Practice Management Software*
- 5) *Admitting our mistakes: Owning up to Lawyer Missteps and the Perilous Consequences of Trying to Bury Professional Error*
- 6) *Time Management for Attorneys: Eight Essential Elements*

Attached in Exhibit A please find proof of completion. Due to technical glitch, I am still waiting on one certificate from the American Bar Association. I am attaching in Exhibit A the e-mail to the ABA asking for the certificate of completion.

One program entitled *Panel of Lawyers Who are Doing it: Practice Management Technology to Grow Your Solo/Small Law Practice Ethically* was not recorded and thus I was unable to watch this program on-line. However, instead of watching only two of the following in number 5 in your Honor's Order, I watched all three programs. What I learned in *Admitting our mistakes: Owning up to Lawyer Missteps*, is relevant here because I didn't realize that this program was only available as a live event and was not going to be recorded like the other programs identified above. I apologize to the Court for this mistake.

What I learned from each course:

- 1) *Ethical Law Office Management for Solo Practitioners*

- a. Risk- Pros and Cons of starting your own practice
  - i. Pros:
    - 1. Establishing a name in the community
    - 2. Long-Term Profitability
    - 3. Self-Gratification
  - ii. Cons:
    - 1. Start-Up Costs
    - 2. Lack of Office Support
    - 3. No Initial Salary/Benefits
    - 4. Ethical Conundrums

## 2) *Flying Solo: Managing Your Practice, Your Team, and Your Finances*

- a. Practice Management Software
  - i. Clio- client has push notifications, cloud based, push to all your devices, docket management system, task management, integrated payment system,
  - ii. PracticePanther- generate bills, works with Microsoft, integration with QuickBooks, client portal, notifications and chat
  - iii. Filevine- case management, in-house texting, integrated bills
  - iv. Needles- comprehensive workflow automation, advance document management
  - v. Avaza- project management, resource scheduling, online timesheets, expense management, recurring invoicing
  - vi. Rocket Matter- fully customizable matter templates, business intelligence

## 3) *Litigation Issues for Small Law Firms and Solos*

- a. Use technology to your advantage
  - i. Videoconferencing (Skype, zoom, facetime)
  - ii. Hands-free, good-quality phone service
  - iii. Second Monitor or Screen
  - iv. Fast Wifi Connection
  - v. Get a Tablet for document management
- b. Keep Your Cases Moving
  - i. Delay is a Defendant's friend
- c. Depositions
  - i. Video
  - ii. Skype
  - iii. Share screen
- d. Strengths/Advantages of Smaller Firms
  - i. Flexible Pricing
  - ii. Lower overhead
  - iii. Nimble Decisive management
  - iv. Unique, specialized strategy choices
  - v. No conflict

## 4) *Transforming a Solo Practice with Practice Management Software*

- a. Importance of having Practice Management Software (helps manage your practice, efficiently and more producibility)
  - i. PracticePanther- Email, Save in native formats In PDF, time activated when email opened/closed, synchronization with outlook and/gmail
  - ii. SmokeBall- Automated/one touch filing in folder or matter learning/matter, Coordinate with existing folders in Outlook/Gmail

5) *Admitting our mistakes: Owning up to Lawyer Missteps and the Perilous Consequences of Trying to Bury Professional Error*

Don't be afraid of owning up to your own mistakes

- a. Ethics- guidelines that state the dos and don't in a specific context
- b. Professionalism- specific traits expected of a professional
- c. Civility and Respect- good not behavior
- d. Integrity- work on the clock
- e. Keep your promises-
- f. Commitment- stay dedicated
- g. Character- dependable, open-minded.
- h. Punctual- Be on time

6) *Time Management for Attorneys: Eight Essential Elements*

Manage your day-to-day by planning in the beginning of the day what your day will look like

Key to Success

- 1) There will be phases of personal response
- 2) Know that feelings can be displaced
- 3) Be Patient with self and others as you adjust
- 4) Extra communication is essential
- 5) Negotiate w colleagues and family
- 6) Balance structure and flexibility

Routines are critical

- a) Sleep patterns
- b) Meal and Snack Times
- c) Break Times
- d) Exercise and self-care
- e) Media Consumption
- f) Family/Friend Time
- g) Workspace Organization
- h) Colleague Meeting Time

The Eight Elements

- a) Plan Effectively- Daily, Quarterly, Annually
- b) Capture & Update Tasks
- c) Prioritize & Schedule
- d) Train, Delegate & Supervise

Liebowitz  Law Firm, PLLC

- e) Organize Info & Email
- f) Optimize Procedures
- g) Frame Boundaries
- h) Cultivate Self-Awareness

#### Mindfulness

- a) Paying attention in a particular way: on purpose in the present moment and non-judgmentally so you can be your physically, emotion, and cognitive best.

Based upon what I learned in the above CLE's, I am continuing to learn new things in my practice management software to run things more efficiently and smoothly. I also am making sure to own up to my mistakes that do happen. I am also improving my time management skills by implementing some of the essential guidelines learned such as managing a plan at the beginning of the day. I am changing the way I use technology such as calendaring to make sure tasks get done on time and items get docketed correctly. I have also learned to delegate tasks that can be delegated to make the work flow more efficient.

I thank the Court for recommending these CLE programs and look forward to continuing to implement what I learned into my practice.

Respectfully submitted,

/s/Richard Liebowitz  
Richard P. Liebowitz