

---

# *Contents*

About the Author	ix
Acknowledgments	xi
Foreword	xiii
<b>Chapter One: Introduction</b>	<b>1</b>
What Is Unbundling?	4
Brief Background	6
Increasing Access to Justice	11
Critics of Unbundling	13
Business Lessons on Unbundling from Other Industries	14
The Music Industry	15
The Airlines	15
The Newspapers	15
Wireless Providers	16
Lessons from Intuit and the Unbundling of Small Business and Personal Finance Services	16
Thinking About Restructuring Your Business to Unbundle?	17
A Team-Based Approach to Unbundling	18
<b>Chapter Two: Ethics of Unbundling</b>	<b>21</b>
Competent Representation: What Is “Reasonable”?	21
Defining the Scope of Representation and Informed Client Consent	23
<b>Chapter Three: Best Practices for Unbundling</b>	<b>27</b>
Case Study: Jared Correia, Esq.	27
Client Intake	29
Check for Conflicts	30

Educate Your Client with Checklists and Instructions	31
Keep Records of Your Interactions with the Client	32
Explaining Unbundled Services to Full-Service Clients	32
Malpractice Insurance: Making Sure Unbundled Services Are Covered	33
Case Study: Lawyers Mutual Liability Insurance Company of North Carolina	34
Termination Letter	36
Good Customer Service	37
<b>Chapter Four: Fixed Fee or Value Billing</b>	<b>39</b>
Checklist for Determining Alternative Billing in Unbundled Cases	43
<b>Chapter Five: Forms of Unbundling</b>	<b>45</b>
Document Drafting and Legal Form Preparation	45
Tips for Legal Document Preparation	47
Ghostwriting	48
Reasons an Attorney May Choose to Ghostwrite	49
Disclosure of Authorship	51
A Suggested Best Practice	52
Limited Appearances	53
Legal Coaching and Strategy	55
Collaborative Law	56
Reasons Why a Lawyer Might Consider Collaborative Law	58
When Collaborative Law Would Not Be Good for Your Client	59
Unbundling Criminal Law Cases	61
Unbundling Alternative Dispute Resolution Legal Services	62
<b>Chapter Six: Pro Bono Opportunities for Unbundling</b>	<b>65</b>
Legal Services Corporation and Court System Initiatives	67
Case Study: Ronald Staudt	68
Other Forms of Pro Bono Unbundling	72
<b>Chapter Seven: Using Technology to Unbundle Legal Services</b>	<b>75</b>
Document Assembly and Automation	76
Case Study: Kenneth A. Adams	77
Case Study: Richard Granat	82
Decision-Making Tools	86
Online Case and Client Management	88

---

Case Study: Jack Newton	89
Delivering Unbundled Services Online	90
Web Calculators and Web Advisers	92
Online Dispute Resolution	94
Case Study: David Bilinsky—ODR	96
Game-Theoretic Bargaining Systems	103
Case Study: Fair Outcomes Inc.	104
Artificial Intelligence	108
Ethics Concerns with the Use of Technology to Unbundle	111
Case Study: Darryl Mountain	112
Conclusion	115
<b>Chapter Eight: Marketing Unbundled Services</b>	<b>117</b>
What Does the Marketplace for Unbundled Legal Services Look Like?	118
What Do the Law Firms Think the Marketplace Looks Like?	121
DIY Will Writing in the UK	124
What Do the Alternative Legal Service Providers Think This Marketplace Looks Like?	126
Working with the Legal Services Companies— The Branded Network Concept	129
Case Study: Charley Moore	130
The Franchised Law Firm	137
Building Your Own Brand for Unbundled Services	140
Case Study: Brian Whalley	142
Checklist for Creating a Brand for Your Unbundled Legal Services	147
Marketing Strategies for Unbundling	148
Traditional Advertising Methods	148
Online Advertising Methods	150
Case Study: Lee Rosen	152
Case Study: Kevin Chern	156
Conclusion	160
<b>Chapter Nine: Conclusion</b>	<b>163</b>
<b>Appendix</b>	<b>167</b>
Case Studies of Firms That Unbundle	167
Internet Law: Kelly Law Firm	167
Corporate Law: Rimon	170
Intellectual Property Law: Firebrand Legal	172
Estate Planning: Rania Combs	173

Family Law: Susan Wakefield	175
Litigation Services: Skiba Law Group, P.L.C.	179
Entertainment Law: Gordon Firemark	184
Other Practices That Unbundle	186
Checklist for the Unbundling Practitioner	189
Additional Questions for the Unbundled Client Intake Process	191
Sample Limited Scope Engagement Agreements	193
Additional Resources	205
Sampling of State-by-State Adoption and Modification of ABA Model Rule 1.2(c) and Ethics Opinions	205
State-by-State Ghostwriting and Limited Appearance Rules	215
States That Require Disclosure	215
<b>Index</b>	<b>223</b>