

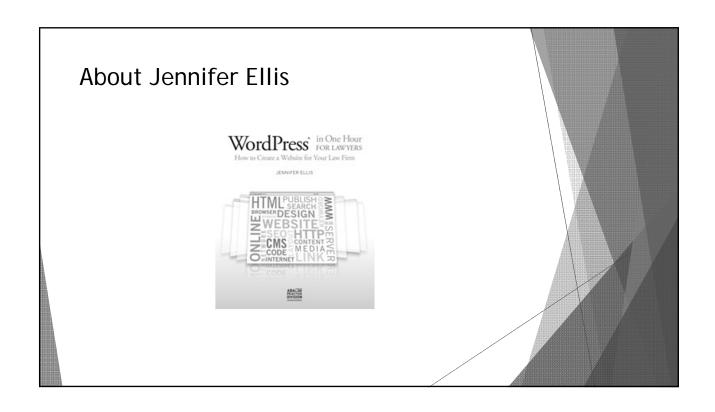
Presented by Jennifer Ellis & Daniel J. Siegel

October, 2016

About Jennifer Ellis

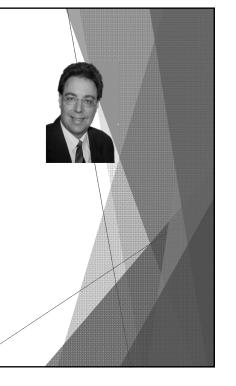
- ▶ Ethics Attorney
 - ► Lowenthal & Abrams, PC
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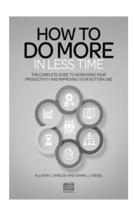


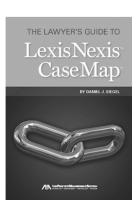
About Dan Siegel

- ▶ Law Offices of Daniel J. Siegel, LLC
 - ▶ Practicing Attorney Focusing on Appellate Writing & Ethical Guidance for Attorneys -Assisting Lawyers With the Things That Keep Them Awake All Night
- ▶ Integrated Technology Services, LLC
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About Dan Siegel







Ethics - Technology



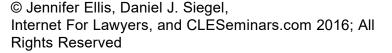
- ► Most states have added competence with technology to their rules.
 - ▶ Based on ABA Model Rule 1.1 Comment 8.
 - ▶ To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject.
 - ► This concept is an umbrella over all use of technology, including seeking and responding to online reviews.
 - ▶ Learn how review sites work.

Ethics - Confidentiality

- ► Model Rule 1.6 requires lawyers to maintain confidentiality.
- ▶ This includes in responses to reviews

What is Confidential Information?

- ► What is confidential information related to representation?
- ► "Information relating to representation" is generally recognized to be very broad and is not limited to secrets or confidences." Iowa Supreme Court Att'y Discipline Bd. v. Marzen, 779 N.W.2d 757, 765-67 (Iowa 2010)



Why Reviews?

- ▶ Potential clients use reviews to make hiring decisions.
- ▶ 92% of consumer use online reviews to determine if they can trust a business.
 - ► https://www.vendasta.com/blog/online-review-monitoring-yelp-reviews/
- ▶ This number is up from 88% in 2014.
 - ► https://www.brightlocal.com/learn/local-consumer-review-survey-2014/

Polling Question Do Reviews Happen To You?



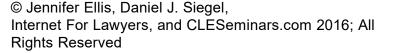


Both Happy and Angry Clients Write Reviews

- ▶ Most sites do not require you to make an account, people can still review you
 - ► AVVO
 - ▶ LawyerRatingz
 - ► Martindale
 - ► Yelp
 - ► Google Business
 - ► Facebook
 - ► Many, many others

97% of Lawyers on AVVO

- ► AVVO seeks to create listings for all lawyers
 - ▶ Provides limited information if you do not claim your account
 - ► Includes information about public discipline
 - ► Allows people to write reviews

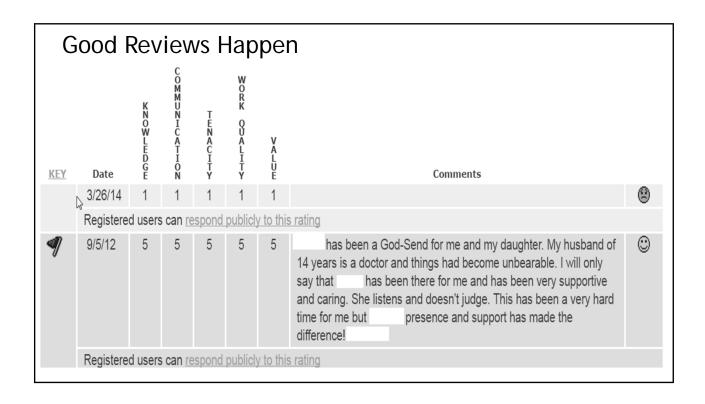


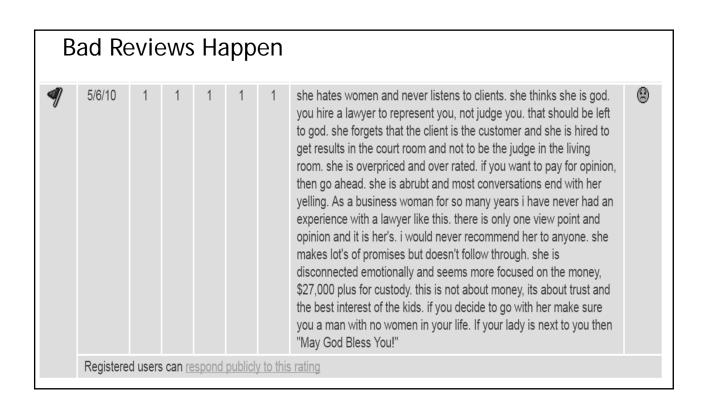
Prepare for Reviews ➤ Make your own online presence first ➤ Seek positive reviews (in an ethically appropriate fashion) ➤ Do not offer anything in exchange for reviews ➤ Target most important sites ➤ AVVO ➤ Google ➤ Yelp ➤ Send polite email or letter asking for reviews from happy clients ➤ Make sure this is acceptable under your ethics rules

▶ Include instructions on writing reviews

► Include links







Mistaken Reviews Happen (PissedCustomer.com)

is a lawyer in Philadelphia Pennsylvania who is very dishonest, incompetent and money hungry. He will send you erroneous bills and will continue to bill you even after you pay everything he asked for. He will continue to find ways to bill you way after he loses your case. His main focus is how much he can make when he takes a case. During trial he takes his paralegal with him in court and charge double fees as if you had hired 2 attorneys. Worse is, he in incompetent and can't articulate a clear defense for his clients. His billings are fraudulent and he will wait just before he goes to trial or before he files a motion for you, to tell you that you have to come up with an additional funds depending on how rich he thinks you are. He will then threaten to quit your case the day of the trial to coax you into giving the money he asks.

He is basically a heartless thief and a charlatan who should be barred from practicing law and ripping off his clients In court he is a total *** who cannot articulate his thoughts very well in front of a judge. He lost most if not all of his cases according to all other lawyers I asked in his area. He lost an easy case for me that according to at least a dozen lawyers I consulted after the case told me the outcome would have been different if I had a different lawyer. If you care about your case and want a fair day in court, stay away from attorney

He will try to get every penny he can possibly get from you mercilessly and still lose your case.

This review is a subjective opinion of a user.

Reviews Happen - Response to Mistake

___ Mar 05, 2015 #954372 ♥Philadelphia, Pennsylvania

This review confuses me with a different attorney. The information in the review does not and could not apply to me.

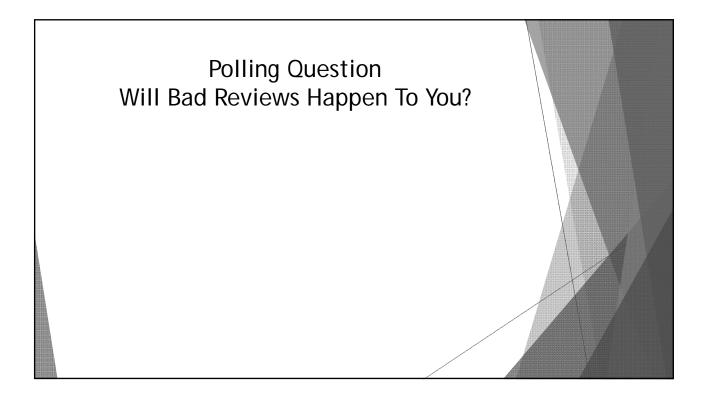
First, because it references a "defense," it appears to apply to a defense attorney, which I am not.

Second, the review addresses how I handle trials, although I am no longer a trial attorney, and have not done trial work in more than 14 years.

Third, when I did conduct trials (generally on behalf of plaintiffs in personal injury matters), I never had a paralegal, and all fees were on a contingency basis.

Fourth, my practice is and has for more than a decade been primarily focused on handling wills and estates and alcoholic beverage law. None of these matters has ever gone to trial.

Fifth, I have never had a client complain about my bills, which are usually based on flat fee or percentage arrangements. Sixth, I do not have a record of ever representing a client named "Morgan." While I regret that Morgan2014 was unhappy with her attorney, she must have confused me with someone else.





The Rules and Responding to Bad Reviews

▶ Do the Rules of Professional Conduct impose restrictions upon a lawyer who wishes to publicly respond to a client's adverse comments on the internet about the lawyer's representation of the client?

➤ Yes.

Rule 1.6: Confidentiality

► "(a) A lawyer shall not reveal information relating to the representation of a client unless the client gives informed consent, the disclosure is impliedly authorized in order to carry out the representation or the disclosure is permitted by paragraph (b)" (Model Rule 1.6)

1.6(b)(5) Defense

- ► "(b) A lawyer may reveal information relating to the representation of a client to the extent the lawyer reasonably believes necessary:"
 - ▶ "(5) to establish a claim or defense on behalf of the lawyer in a controversy between the lawyer and the client, to establish a defense to a criminal charge or civil claim against the lawyer based upon conduct in which the client was involved, or to respond to allegations in any proceeding concerning the lawyer's representation of the client"

Restatement 3rd §61-67: Confidentiality

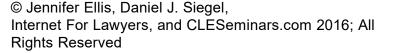
- ► The Restatement is clear in terms of when confidential client information can be revealed. It also provides a self defense option under §64:
- ► "A lawyer may use or disclose confidential client information when and to the extent that the lawyer reasonably believes necessary to defend the lawyer or the lawyer's associate or agent against a charge or threatened charge by any person that the lawyer or such associate or agent acted wrongfully in the course of representing a client."

Comment C: Charges and Imminent Threat

► "A lawyer may act in self defense ... only to defend against charges that imminently threaten the lawyer or the lawyer's associate or agent with serious consequences..."

Comment E: All Options Exhausted

► "The lawyer must believe that options short of use or disclosure have been exhausted or will be unavailing or that invoking them would substantially prejudice the lawyer's position in the controversy."



The Key Terms

- ▶ Defense (Rule 1.6 and 64)
- ► Reasonably necessary (Rule 1.6 and 64)
- ► Charge or threatened charges (64 and comment c)
- ► Controversy (Rule 1.6(b)(5) and 64 comment e))
- ► Proceeding (Rule 1.6(b)(5))

Key Terms Not Defined

- ► Many of the terms in the rule and the Restatement are undefined and unclear.
 - ▶ Most ethics attorneys believe that confidential information may not be shared for purposes of defense relating to a review.
 - ▶ A minority of ethics attorneys argue that lawyers should be able to respond to reviews with confidential information.
 - ► Must Understand: Bar associations and disciplinary boards are using the rules to require a legal action of some kind and do not allow sharing of confidential information for response to reviews.

Conclusion

- ► Criticism on the Internet does not trigger the required proceeding, controversy under the Rule or charges under the restatement.
- ► Respond to negative reviews by providing confidential information at your own risk!
- ► Keep in mind, there are not only ethical issues, but PR concerns as well.

New Hampshire Bar Association Ethics Committee, NH Bar News, Feb. 19, 2014

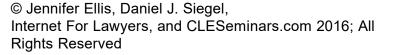
- ▶ In response to a client's online comment that the lawyer took the client's money for a hearing that he knew he could not win, the Committee advised that "while you may be permitted to make some sort of limited response to your client's postings, you are not authorized to make the disclosures that you propose."
- ► https://www.nhbar.org/legal-links/Ethics-Opinion-2014-15_05.asp

Los Angeles County Bar Association Professional Responsibility and Ethics Committee Opinion 525 (Dec. 6, 2012)

- ▶ A lawyer may publicly respond to comments as long as the attorney's reply
 - ► (1) does not disclose any confidential information;
 - ▶ (2) does not injure the former client in any matter involving the prior representation; and
 - ▶ (3) is proportionate and restrained.
- http://www.lacba.org/docs/defaultsource/ethics-opinions/archived-ethicsopinions/ethics-opinion-525.pdf

San Francisco Bar Association (Op. 2014-1):

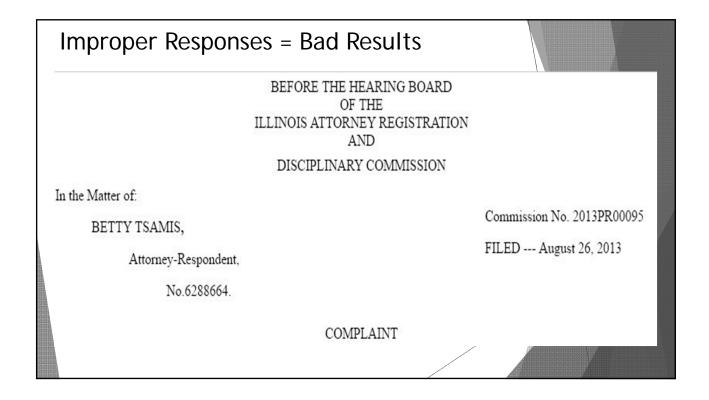
- ► A lawyer is not barred from responding to an online review by a former client when the former client's matter has concluded.
- ► The lawyer's on-going duty of confidentiality prohibits the lawyer from disclosing any confidential information about the prior representation absent the former client's informed consent or a waiver of confidentiality. San Francisco Bar Association.
- ► https://www.sfbar.org/ethics/opinion_2014-1.aspx



Pennsylvania Bar Association (Op 2014-200)

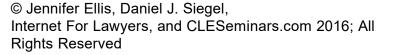
- ► Analyzes "whether the Pennsylvania Rules of Professional Conduct impose restrictions upon a lawyer who wishes to publicly respond to a client's adverse comments on the internet about the lawyer's representation of the client."
- ► Concludes "that the lawyer's responsibilities to keep confidential all information relating to the representation of the client, even an ungrateful client, constrains the lawyer."
- ► Concludes "that a lawyer cannot reveal client confidential information in response to a negative review without the client's informed consent."
- ► https://www.pabar.org/members/catalogs/Ethics%200pini ons/formal/F2014-200.pdf

Punishments Cause Press ABARA http://tinyurl.com/kry4t6l Lawyer accused of revealing TMI in response to bad Avvo review is reprimanded; overdraft also cited POSTED JAN 21, 2014 11:45 AM CST BY DEBRA CASSENS WEISS A Chicago lawyer accused of disclosing confidential information about a client in response to his bad Avvo review has been reprimanded partly for the revelation.



AVVO Review and Unwise Response

- Client posted review
 - ▶ I paid Ms. Tsamis \$1500 to help me secure unemployment while she knew full well that a law in Illinois would prevent me from obtaining unemployment benefits."
- Tsamis responded
 - ▶ "This is simply false. The person did not reveal all the facts of his situation up front in our first and second meeting. [sic] When I received his personnel file, I discussed the contents of it with him and informed him that he would likely lose unless the employer chose not to contest the unemployment (employers sometimes do is [sic]). Despite knowing that he would likely lose, he chose to go forward with a hearing to try to obtain benefits. I dislike it very much when my clients lose but I cannot invent positive facts for clients when they are not there. I feel badly for him but his own actions in beating up a female coworker are what caused the consequences he is now so upset about."

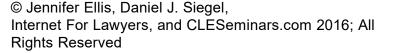


Disciplinary Response

- ▶ "By stating in her...AVVO posting that [client] beat up a female coworker, Respondent revealed information that she had obtained from [client] about the termination of his employment. Respondent's statements sin the posting were designed to intimidate and embarrass [client] and to keep him from posting additional information about her on the AVVO website."
- ▶ Respondent engaged in the following misconduct
 - ► Revealing information relating to the representation of a client without the client's informed consent
 - ▶ Using means in representing a client that have no substantial purpose other than to embarrass, delay or burden a third person
 - ► Conduct which is prejudicial to the administration of justice or which tends to defeat the administration of justice or to bring the courts or the legal profession into disrepute

Final Result

- ▶ Joint stipulation
 - ▶ Punishment for review but also a trust fund irregularity
 - ► Found mitigating factors no prior problems and remorse
- ► Reprimand and Public Admonishment



Good Idea/Bad Idea?

Posted by Richard R. April 10, 2013

Claims To Be "On Your Side" Is False

I Paid Ms. Tsamis \$1500 to help me secure unemployment, while she knew full well that a law in Illinois would prevent me from obtaining unemployment benefits

Betty Tsamis's response: "I am disappointed that this former client feels the way he does. I disagree with how he has presented the facts and they are contradicted by his written engagement agreement with me. I dislike it very much when my clients lose but can assure prospective clients that I do not misrepresent outcomes in any case."

Posted by Dan April 2, 2013

A Very Disappointing Experience

Clearly values her time above her service. Needed to research basic premises of the law, then billed for the time spent researching. Was often dogmatic and confrontational. Clearly insecure regarding her abilities and skills. Missed appointments without warning. Never communicated any strategy on how she was going to handle my case. When you seek legal councel, you need someone professional, skilled and knowledgeable. Betty Tsamis is none of these things.

Betty Tsamis's response: "I am disappointed that this former client feels the way he does. I disagree with how he has presented the facts and they are contradicted by his written engagement agreement with me. I dislike it very much when my clients lose but can assure prospective clients that I do not misrepresent outcomes in any case."

Attorney Suspended

- ▶ Disciplinary Actions
- ▶ Office of Lawyer Regulation v. Peshek, 798 N.W.2d 879 (Wis. 2011)
- ➤ Suspended a lawyer who wrote and published an Internet blog that revealed confidential information about current and former clients that was sufficiently detailed to identify those clients using public sources.

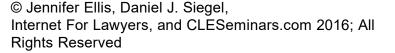
Conclusions

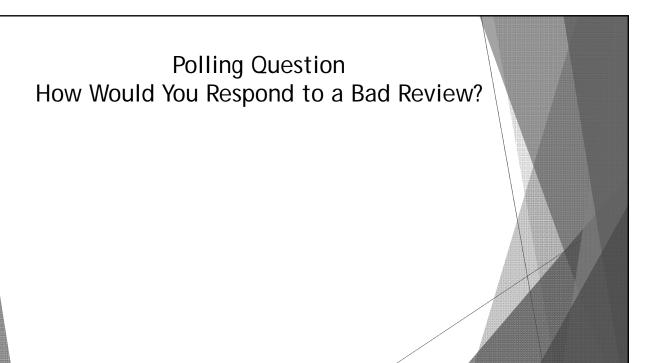
- ▶ If you decide you must respond:
- ► "The trick is to not get defensive, petty, or feel the need to directly refute what you perceive is wrong with the review. It's far more effective to think of future readers when writing the review, rather than the original reviewer."

Avvo, Inc. General Counsel Josh King (http://on.wsj.com/1q9WqTM)

Conclusions

- ➤ A lawyer's responsibilities to keep confidential all information relating to the representation of a client, even an ungrateful client, must constrain the lawyer
- ► A lawyer cannot reveal client confidential information in a response to a client's negative online review absent the client's informed consent.





Some Potential Responses

- ▶ Responses should be proportional and restrained.
- ▶ Potential responses:
 - ▶ We are sorry that the client was not satisfied with their representation. Unfortunately, ethical rules constrain us from providing a direct response to this client's concerns in public. We strive to provide the best representation to each and every client.
 - ▶ Ethical rules constrain us from fulling responding to this individual's review. However, we welcome a call to discuss their concerns. Our firm strives to provide the best representation to every client.

Pennsylvania Recommends

- ► "A lawyer's duty to keep client confidences has few exceptions and in an abundance of caution I do not feel at liberty to respond in a point-bypoint fashion in this forum. Suffice it to say that I do not believe that the post presents a fair and accurate picture of the events."
- ► See Formal Opinion 2014-200

Suing Over Defamatory Reviews
Is Suing a Good Idea?

Triggers "Streisand Effect"

- ► Creates publicity and draws attention to client's concerns
- ▶ Could result in malpractice suit or ethics complaint
- ► Lawsuit creates the requisite "proceeding" under RPC 1.6(c)(4).
- ► May share confidential information as necessary to pursue or defend against claim

Successful Suit - Texas (Yelp lawsuit)

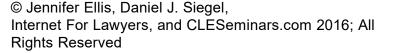
- ► Texas law firm sued a client over a negative Yelp review, posted after the firm sued for fees
- ► Former client complained in review that "this firm not only won't help you they intend to do you harm if they can't extract enough money of you[.] They are disorganized, deceptive, manipulative and largely disrespected...."

Texas Suit (Continued)

- ► Firm was successful
- ▶ \$100,000 verdict
- Review removed
- ► For a period, another negative review from a different person was posted. (Referred to original negative review.)
- ► Grissom & Thompson, LLP v. Browning

Successful Suit - Florida

- ▶Defamation suit against client and client's husband
- ▶"No integrity. Will say one thing and do another. Her fees outweigh the truth."
- ▶"Altered her charges to 4 times the original quote with no explanation."
- ▶\$350,000 verdict
- ►Upheld on appeal
- ▶ Settle with non-client defendant
- ►Client defendant created her own website to talk about the case (she is trying to go forward pro se.
- ▶Blake v. Ann-Marie Giustibelli, P.A.



Successful Suit - Georgia

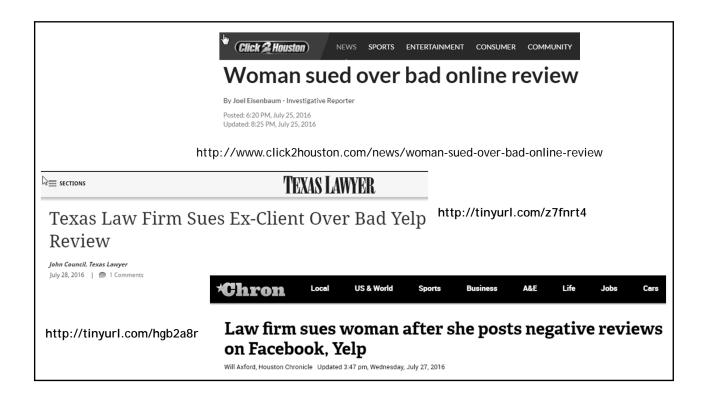
- ► Georgia appeals court affirmed verdict in favor of divorce lawyer against former client who described her as a "CROOK lawyer" and an "Extremely Fraudulent Lady" on an online business rating site.
- ▶ \$405,000 verdict
- ► Pampattiwar v. Hinson

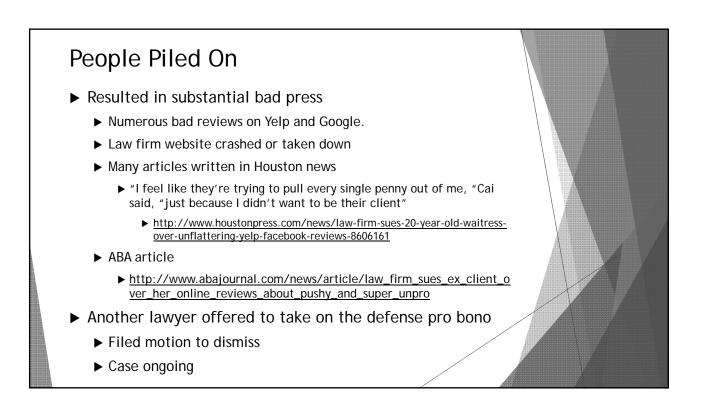
Recent Lawsuit: Terrible PR

- ➤ Young woman injured in car accident. Hired firm. Fired firm.
- ► Wrote negative reviews.
- ▶ Firm asked to remove or adjust.
- ▶ Woman refused, wrote more reviews.
- ▶ Firm sued.

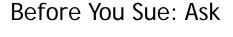
June 30 · Richmond, TX

If you're looking for a good law firm to fight for your case, PLEASE DO NOT even if they offer you a lower percentage go to than other law firms. Please don't waste your time. This is my first accident, and a major one too. I was recommended by my uncle, so I thought they couldn't be so bad because I saw few bad reviews online. After 3 days, they didn't tell me anything about the doctor I needed to go to. I was in a lot of pain. Not only that, they didn't know where the hell my car was! And they came to my house and into my room to talk to me when I was sleeping in my underwear. Seriously, it's super unprofessional! After that, I found someone else to switch to. I asked them for a release letter without interest. They didn't want to write me one until a week later. Not ONLY that, they also put a LIEN on all 3 insurances including my own. I called them, and they told me they were only charging the fees for 2 days. I said that was fine and told them to put it in writing because I needed it, but they kept intentionally ignoring me. I came in the office to meet with my previous attorney, but he literally ran off. I introduced myself, and 30 seconds later he took off! So please DON'T waste your time at

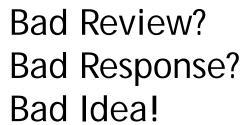








- ▶ How many people will actually see the review?
- ▶ Will suing over the review cause it to get more attention than it otherwise would?
- ▶ Do you have positive reviews to counteract one negative review?
- ▶ Will the review actually do any damage?
- ► Why are you *really* suing?
- ▶ What will suing accomplish?



Presented by Jennifer Ellis (<u>Jennifer@JLEllis.net</u>)
& Daniel J. Siegel (<u>Dan@DanielJSiegel.com</u>)

October 26, 2016