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Client Development

(Note: In the E-Book version, click on the title to jump to an individual form.)

SECTION 18.00: Referral System

SECTION 21.00: Marketing Events

SECTION 22.00: Internet Marketing

EXTRA FORMS

How to Use The E-Book Version of This Book

This digital copy of your Advanced Implementation System includes Smart Forms with fillable fields (any form with a highlighted field), clickable links to audio files, articles and forms.

By clicking the audio icon you will be able to access recorded telephone conferences from both our Rainmakers Program and Graduate Network. (FYI : Any forms referred to in these programs are already included in this system.)

Be sure to look for these icons. Each will direct you to a relevant file download:

 Articles

 Audio

 Forms

Your Client Development Plan

FORM 18.00

Based on the scores from your Atticus Client Development Diagnostic, we recommend the following Plan:

Attitude:

- ☐ To educate yourself about client development
- ☐ Read: Marketing Your Services
- ☐ To increase your level of satisfaction with your practice:
  - ☐ Create a Mission Statement (Form 12.01) that reflects your values, refer to it when planning
- ☐ To overcome your fear of marketing
  - ☐ Work with your individual coach to role-play, practice language
  - ☐ Reframe your attitude about influencers being friends
  - ☐ Practice! Start small with "safe" people, then move to riskier ones
  - ☐ Remind yourself that people want to help you succeed

Who To Talk To:

- ☐ Identify Primary/Ideal Clients
  - ☐ Identify A, B, C & D Clients (Form 18.06)
  - ☐ Meet with staff to create intake standards for new clients (Form 18.06A)
  - ☐ Use the client scorecard with every intake, only work with the As & Bs
  - ☐ Fire all C and D clients
- ☐ Identify Primary Influencers
- ☐ Determine the categories of people that influence your practice
  - ☐ Identify Top 20 Influencers
  - ☐ Create your Top 20 List, add to practice planner (Form 18.01)
  - ☐ Refer to Top 20 List when planning weekly marketing activities (Forms 18.02-18.05)
- ☐ Identify Cross-sell opportunities
  - ☐ Meet with partners to discuss opportunities for introductions (Form 19.07)
  - ☐ Start cross-sell lunch campaign (Form 19.06)
  - ☐ Determine cross-sell and up-sell opportunities among existing clients, send letters (Forms 20.02-20.04)

What To Say:

- ☐ Conduct Client Satisfaction Interviews (Form 19.02)
- ☐ Conduct Influencer Satisfaction Interviews (Form 19.02)
- ☐ Create a Laser Talk (Form 19.01)
- ☐ Practice Story Telling (Form 19.03)
- ☐ Practice acknowledgements of influencers, clients, staff
- ☐ Practice gift giving to influencers (Reference Form 18.02, “Hobbies & Special Interests Section”)

- ☐ Send thank you cards/letters for every referral
  (Form 20.01 & Client Development Cards Section)
- ☐ Ask for influencer introductions
- ☐ Ask for new business from influencers
- ☐ Ask for new referrals from clients

When To Say It:
<u>Calendar of Events</u>

- ☐ End-of-Year Events:
  - ☐ Host one (1) holiday party at the firm
  - ☐ Attend 3 - 5 other holiday events at client or influencer offices/homes
  - ☐ Give personalized gifts to Top 20 Influencers
- ☐ Have one firm special event (sports-based, community-based)
  (See Form 18.05 for Top 20 Action Ideas)
- ☐ Do one full or half- day firm retreat to focus on Mission Statement (T/M & Productivity Form 12.01), and Your Client Development Plan/Marketing efforts (Form 18.00)

- ☐ Quarterly Events:
  - ☐ Have 2 - 3 lunches with farm team
  - ☐ Tour 1 - 2 client facilities
  - ☐ Send firm newsletter to clients and influencers
  - ☐ Give one seminar to clients and/or influencers
  - ☐ Have one speaking engagement
  - ☐ Set-up bar meeting hospitality suites, dinners or golf games
  - ☐ Start cross-selling campaign with firm partners
  - ☐ Create or update website

- ☐ Monthly Events:
  - ☐ Participate in service clubs or other influential organizations
  - ☐ 3 Dinner events with clients or influencers
  - ☐ 1-2 community/charity events with clients and /or influencers
  - ☐ Write one (1) article for local newspaper or trade journal
  - ☐ Conduct one (1) VIP lunch or reverse seminar at the firm
  - ☐ Cut-out and send copies of articles to clients and/or influencers

- ☐ Weekly Events:
  - ☐ Have a standing, weekly sports or hobby related marketing event (golf or tennis) – Institutionalize on Your Time Template Form 13.01
  - ☐ 2 Lunches with Top Twenty Influencers
    (See Scripts: Forms 19.04-19.04A)
  - ☐ 1 Lunch with new Influencer
  - ☐ Make three (3) calls that contain some marketing conversation
  - ☐ Monitor staff marketing efforts (Forms 18.03-18.04)
  - ☐ Send hand-written thank you notes for new referrals (Form 20.01)

What to Track:

- ☐ Track these ratios on Dashboard, monthly
  - ☐ # phone inquiries generated by influencers, clients, the yellow pages, other media
  - ☐ #phone inquires converted to in-office consultation
  - ☐ # consultations that convert to new clients
  - ☐ # marketing activities conducted/attended by firm principle, partners or attorneys (optional: staff may participate in marketing events as well with their peers to generate referrals, if appropriate)

Top 20 Referral Sources Roster

FORM 18.01

For: | **As of:**

Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**
Name: **Phone #:** **Email Address:**	**Name:** **Phone #:** **Email Address:**

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Discovering Prominent Referral Sources

FORM 18.01A

Name:

File Name	Level of Client	Name of Referral	Type
Andrews, Ryan	*A*	*Joseph Smith*	*Friend*

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Influencers By Practice Type

FORM 18.01B

BUSINESS
- Business brokers
- Corporate meeting planners
- Financial planners
- In-house legal depts.
- Insurance associations
- mid/large-size company owner or president
- Local event convention Planners
- Minority owned businesses
- Newspaper reporters
- Small business networks
- Stock brokers
- Venture capitalists

EMPLOYMENT LAW
- Corporate HR Dept(s).
- Minority owned businesses

IMMIGRATION & INTERNATIONAL LAW
- Embassies
- Immigration Agencies

INSURANCE DEFENSE
- Claims Adjusters

PERSONAL INJURY
- Ethnic churches
- Ethnic community leaders
- Hospital administrators
- HRS Depts.
- Minister/clergy
- Physicians
- Television advertisements

CORPORATE BUSINESS
- Business brokers
- Corporate meeting planners
- CPAs, accountants
- Franchise owner/president
- In-house legal depts.

CRIMINAL DEFENSE
- Juvenile Agencies
- Newspaper reporters

DIVORCE
- Mental health counselors
- Ministers, clergy

NOTE:

Other attorneys and entrepreneurs are a great referral source for any type of practice.

ESTATE PLANNING
- Bankers
- CPAs
- Financial planners
- Funeral Home Directors
- Insurance associations
- Insurance companies
- Mid-size company owners or president
- Nursing Home Admin.
- Senior citizen groups
- Stockbrokers

ELDER LAW
- Nursing Home Admin.
- Senior citizens groups

FAMILY LAW
- Addiction counselors
- Adoption agencies
- Detox Units
- HRS Department
- Juvenile agencies
- Mental Health counselors
- Ministers, clergy
- Shelters
- Social service agencies
- Therapists

REAL ESTATE
- Bankers
- Building associations
- Homeowner's assoc.
- Real estate agents/brokers
- Real estate developers
- Title companies

TAX
- Bankers
- Business Brokers
- CPAs, accountants
- Financial planners
- Insurance Associations
- Mid-size company owners and/or president
- Stockbrokers
- Venture capitalists

WORKERS COMP
- Ministers, clergy
- Physicians

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Top 20 Exercise

FORM 18.01C

Referral Source by Name	Potential A-B-C-D	Actual A-B-C-D	Rapport A-B-C-D	Last Contact	Type of Person
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

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Top 20 Referral Sources

FORM 18.02

Influencer:

Firm/Company:
Secretary/Assistant:
Dept:
Title:

Spouse's Name:

Office Address:

Cell:
Phone:
Fax:
Email:
Phone:
Fax:
Email:

Home Address:

Cell:
Phone:
Fax:
Email:
Phone:
Fax:
Email:

PERSONAL INFO

Birthday:

Favorite Restaurants:
1)
2)
3)

Hobbies/Special Interests: (Sports Teams, Favorite Wines, Food, Preferences, Etc.)

Anniversary:
Spouse Birthday:

About the Children: (if appropriate)

Name:	**Age:**	**B'day:**
Bio:		
Name:	**Age:**	**B'day:**
Bio:		
Name:	**Age:**	**B'day:**
Bio:		

Influencer Education & Experience:

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Gathering Personal Info About Referrals Script Top 20

FORM 18.02A

A script for gathering Top 20 Profile information from an influencer's assistant.

Only request information about the influencer's family if your attorney is very close to the person or it may be perceived as phony interest!

Hi! This is ____________________ with ____________________.
May I speak with Mr/Mrs _____________________'s assistant please? TY

Hi, ____________! This is _________________ with _______________'s office.
How are you doing today? (Great!)
__________________, your office (or attorney) has been so fantastic about sending business our way that Mr/Mrs ____________ would like to acknowledge Mr/Mrs ____________ on special occasions.

Can you tell me his/her birthday?____________ Anniversary? ____________

Excellent! Do you have any suggestions for gift ideas ~ Does he/she:

- ❑ *enjoy a certain type of food, or like to dine at any particular restaurant?*
- ❑ *favorite wine, champagne?*
- ❑ *smoke cigars? what brand?*
- ❑ *love chocolates, or a special coffee or tea?*
- ❑ *care for plants, or a particular flower?*
- ❑ *shop somewhere regularly?*

NOTE:
Engage in a casual conversation and document what information is shared. If the assistant seems stumped, ask her if she can possibly "snoop around a bit" and get back with you. You might mention that this would be great information for the assistant to have at her disposal as well in order to surprise her attorney! (The assistant may be able to get information from the attorney's wife/husband as well.)

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Top 20 Referral Source Contact History

FORM 18.03

Name:

Date of Contact:
Type of Contact: (Place an X next to the correct choice)

- **Phone** ☐
- **In-Person** ☐
- **Written** ☐

Outline below any Contact "Bell Ringers" (key points to remember from your conversation or the note, letter or card you sent.) If you were unsuccessful reaching them by phone, document attempts here and select the "call back" option.

Next Type of Contact:

- **Call Back** ☐
- **In Person Visit** ☐
- **Schedule Lunch/Dinner** ☐
- **Letter/Note** ☐
- **Card** ☐

Next Contact Date:
Calendar Updated: **(Don't Delay. Update Your Calendar, Planner or 1-31 File System Now!)**

Date of Contact:
Type of Contact: (Place an X next to the correct choice)

- **Phone** ☐
- **In-Person** ☐
- **Written** ☐

Outline below any Contact "Bell Ringers" (key points to remember from your conversation or the note, letter or card you sent.) If you were unsuccessful reaching them by phone, document attempts here and select the "call back" option.

Next Type of Contact:

- **Call Back** ☐
- **In Person Visit** ☐
- **Schedule Lunch/Dinner** ☐
- **Letter/Note** ☐
- **Card** ☐

Next Contact Date:
Calendar Updated: **(Don't Delay. Update Your Calendar, Planner or 1-31 File System Now!)**

Monthly Marketing Activities

FORM 18.04

Month: ____________________

		Dinners	Info Sent	Lunches	Meetings	Other	PH Calls	Seminars	Sporting	Total
								Attended	Events	
Day	Date									
M										
TU										
W										
TH										
FR										
Total	Week #1									
M										
TU										
W										
TH										
FR										
Total	Week #2									
Sub-TL	Week 1-2									
M										
TU										
W										
TH										
FR										
Total	Week #3									
Sub-TL	Week 1-3									
M										
TU										
W										
TH										
FR										
Total	Week #4									
Sub-TL	Week 1-4									
M										
TU										
W										
TH										
FR										
Total	Week Five									
Sub-TL	Week 1-5									
Monthly Goals										
Actual Contacts										
End Result										
		Dinners	Info Sent	Lunches	Meetings	Other	PH Calls	Seminars	Sporting	
								Attended	Events	
Bonus Formulas										
Bonus Earned										

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Top 20 Action Ideas

FORM 18.05

Breakfast, Lunch or Dinner Meetings
Dinner Events in Your Home or Office

Take in a Movie
Go to a Play
Attend Local Gallery Openings and Art Shows
Music Festivals

Clip Relevant Articles and Send Copies to Clients/Influencers

Attend Sporting Events Together
Golf, Tennis, Hiking, Boating/Diving, Fishing, Running Events
(Participate in a game, host an event or go as a spectator!)

Community Events:
Volunteer
Sponsor a Volunteer Activity
Join an Activity with Your Church or Friends

Seminars, Workshops and Speaking Engagements
(Join the speaker's bureau at your local bar association)

Write Articles in Newsletters, Professional Journals or Newspapers
Send out a Personalized Note
Acknowledge Events in the Client/Influencer's Personal or Professional Life
Civic Achievements and Awards
Promotions, Marriage, Birthday, Holidays

Call Clients/Influencers on the Telephone

Participate Actively and Enthusiastically in Service Clubs
(if you have an interest in their efforts)
Rotary, Lions, Kiwanis

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Intake and Evaluation Matrix
Client Scorecard/Generic Example

FORM 18.06

Directions: Use this form as a screening device for new client intake. Write the number "1" in each blank that is applicable to your client. Each "column" should have only one number in a box. When the matrix is complete, add the numbers from left to right. Place the total in the "Total Per Row" column and multiple by the coefficient to obtain a score for each row. Write the total score in the "Total Score" blank at the bottom of the page. Calculate the "Case Rank" by circling the letter which is closest to the client's "Total Score" using the "Score Box". If applicable, fill in the "Retainer" and "Evergreen" amounts based on the case ranking.

Rank	Cooperation	Case Value	Collectable	Referral Source	Total Per Row
A	High _____	High $ _____	High _____	Very Good _____	_____ X 1 = Score: _____
B	Medium _____	Medium $ _____	Medium _____	Good _____	_____ X 2 Score: _____
C	Low _____	Low $ _____	Low _____	Yellow Pages _____	_____ X 3 Score: _____
D	Very Low _____	Very Low $ _____	Very Low _____	Yellow Pages _____	_____ X 4 Score: _____

Total Score: ______________________________

Scoring Scale: 8 to 32 point scale

SCORE BOX
(The lower the score, the better. Circle the final rank.)

8 =	Perfect Client with Great Case	Rank = A
16 =	Good Client with Good Case	Rank = B
24 =	Difficult Client with Difficult Case	Rank = C
32 =	Very Difficult Client with Very Difficult Case	Rank = D

Retainer:

____

Evergreen:

____

Quarterly Review Questions:

Atty. Time Spent:	________	hrs. x	$_________	hr.	=	$___________
Assoc. Time Spent:	________	hrs. x	$_________	hr.	=	$___________
Staff Time Spent:	________	hrs. x	$_________	hr.	=	$___________
				Expenses	=	$___________
				Total Investment to Date		$___________
				Compare to Budget		$___________
				Differential		$___________

Case Evaluation Questions:

1. Upon discovery, have new issues changed the case value?
2. Should the case be routed for completion, litigation, settlement, further research, referral or closure? (Circle One)

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Potential Client Scorecard

FORM 18.06A

Name: **Date: ___/___/___**

Instructions: Use this form to weed out C/D-level clients by using the scorecard below to check off "Warning Signs". IF MORE THAN THREE (3) BLOCKS ARE SELECTED, you are probably dealing with a high maintenance person who will require 80% of your time -- with only a 20% return in revenue. If this happens, you may want to bow out gracefully.

Staff members who screen calls and/or set appointments for the attorney should rate the potential client initially. If an appointment is scheduled, the form should then be passed off to the attorney who can document any other red flags that appear during the first meeting.

SOURCE:

- ☐ **Found out about attorney/firm in the phone book**
- ☐ **Referred by a local bar referral service**
- ☐ **Referred by C/D-level client(s)**

MATTER TYPE:

- ☐ **Work is out of attorneys area of expertise, or one attorney dislikes**

FINANCIAL:

- ☐ **First question was, "How much is this going to cost me?"**
- ☐ **Mentioned that they know another lawyer who is cheaper**
- ☐ **Resisted paying a consultation fee or a retainer, or only willing to pay half of the fee/retainer**
- ☐ **Holding out on the promise of future work in order to get discounted fee**
- ☐ **Is a distant family member expecting a "deal"!**

COOPERATION:

- ☐ **Mentioned that they are switching (or have switched) attorneys mid-stream**
- ☐ **Showed up with an urgent life & death matter demanding the attorneys full immediate attention**
- ☐ **Deaf to an objective realistic appraisal of his/her case**
- ☐ **Requested that the attorney guarantee a particular outcome**
- ☐ **Doesn't want to take responsibility for his/her own actions**
- ☐ **Reluctant to schedule an appointment, or repeatedly missed meetings/changed appointments once a time was set**
- ☐ **Neglects to bring requested documents**
- ☐ **Seems evasive (not forthcoming, untruthful)**
- ☐ **Knows more about the law than attorney does…. wants to direct/control the case**
- ☐ **Downplays the seriousness of the problem or complexity of the matter.**

ATTITUDE:

- ☐ **Displays a level of anger that is disproportionate to the matter at hand**
- ☐ **Appears to be "seeking revenge" or hiding an agenda**
- ☐ **Has a bad attitude toward lawyers in general**
- ☐ **Difficult to please, no matter how well you take care of him/her**

☐ **TOTAL # WARNING SIGNS**

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ABCD Client Matrix

FORM 18.06B

	Client Personality	Type of Case	Case Value	Collectible	Referral Source	Client Expectations
A						
B						
C						
D						

NOTES: ____

____

ABCD Client Matrix Sample

FORM 18.06C

	Client Personality	Type of Case	Case Value	Collectible	Referral Source	Client Expectations
A	Low Maintenance & Cooperative	Preferred Work (enjoy the work and it's within your practice expertise)	High Fees	High (pays retainers/ bills promptly & doesn't question invoices/ statements)	Very Good	Realistic Expectations
B	Low Maintenance & Cooperative	Semi-Preferred Work	Medium Fees	Medium	Good	Realistic Expectations
C	High Maintenance & Not Cooperative	Non-Preferred Work	Low Fees	Low or Slow Pay	Yellow Pages (or referred by a C client)	Unrealistic Expectations
D	High Maintenance Very Difficult	Work Out of Your Practice Expertise	Low Fees or No Fees	Very Low or No Pay	Yellow Pages (or referred by a D client)	Unreasonable Expectations

NOTES: ____

____

(If a client scores low in the "Collectible" column, it drops their score across the board. If your firm can't collect, it does not matter how well the person scores in other categories....)

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Institutional Client Scorecard

FORM 18.06D

	Effective Hourly Rate	Payment Terms	Rapport w/ Contact Person	Reasonableness of Expectations	Level of Satisfaction With Work
A					
B					
C					
D					

NOTES: ______________________________

____

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Institutional Client Scorecard Sample

FORM 18.06E

	Effective Hourly Rate	**Payment Terms**	**Rapport w/ Contact Person**	**Reasonableness of Expectations**	**Level of Satisfaction With Work**
A	Profit Comparable To Market	30-days	Excellent	Very Reasonable	Very Satisfying – a good fit for your practice and expertise
B	Marginal Profit	30 – 45 days	Good	Usually Reasonable	More routine – still a good fit for your practice and expertise
C	No Profit	45 – 60 days	Not so Good	Unreasonable	Not a good fit for your practice and expertise
D	Losing Money	Greater than 60	Very Poor	Completely Unreasonable	Problematic and outside your area of expertise

NOTES: ____

____

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A/B/C/D Intake Flowchart

FORM 18.06F

Receptionist Intake

BY PHONE:
Receptionist to follow Potential Client Inquiry Call Script, Form 18.06G

IN PERSON:

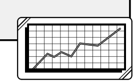
- **Receptionist to complete Form 18.06H, Inquiry Info Sheet.**
- **Receptionist to have "initial consultation" conversation w/ client.**
- **Client to complete the Intake Sheet.**
- **Receptionist to Identify Red Flags on Form 18.06A, Potential Client Scorecard & staple it to the completed Intake Sheet.**
- **Receptionist to send TY card**

Attorney Intake and Evaluation

Attorney to review Intake Sheet and complete Client Matrix

Attorney to use Initial Consultation Checklist Script

Attorney to prepare flowchart for case.



3 POSSIBLE OUTCOMES:
(See 8.00 series forms in the Atticus Cash Flow systems)

1) Retain Client
   - Representation Agreement
   - Welcome Letter
2) Not Retain
   - "No Representation" Letter
3) "May Represent"
   - "May Represent" Letter with Conditions and Proposed Representation Agreement

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Potential Client Inquiry Script

FORM 18.06G

This script assumes a prospect has called and has asked to meet or speak with an attorney.

Receptionist: "I can help you with that. My name is ____________ and I set Mr./Ms. _____________'s appointments. First, let me ask whom can we thank for referring you to our office."

[If the referral source is on the A list and the prospect is not qualified (under the scorecard), don't refer the prospect away. Set the prospect for a call (10 min.) with attorney.]

If the referral source is NOT on the A list, continue with:

"To determine if there is a match between you and our firm, I'd like to ask you a few questions. Is that all right with you?"

[Remember: If the referral source is one of the Top 20 and the prospect is not qualified (out of area), don't refer the prospect away. Set the prospect for a call (5 min.) with attorney.]

Receptionist: "Please tell me a little bit about the matter you'd like help with."

[Write answer in matter description on Inquiry Sheet.]
Is the area within the firm's expertise?

If not, make a referral off the referral list and say:

"Unfortunately, our office does not practice in that area. We find that we can better represent our clients when we focus our practice in a limited area. When a matter outside our expertise arises we have other attorneys to whom we refer those matters. Would you like the name of another attorney who may be able to help you?"

Otherwise, continue:

Receptionist: "Have you used the services of an attorney in the past?" YES / NO

If yes, ask: "Did you feel you received good service from that attorney?"

Whether the answer is yes or no, ask:

"Why?" *[Write answer in matter description on Inquiry Sheet.]*

Receptionist: "Have you used the services of another attorney in this matter?" YES / NO

If yes, ask: "Who?" *[Write answer in matter description on Inquiry Sheet.]*

“What is causing you to make a change?” *[Write answer in matter description on Inquiry Sheet.]*

“Do you have an immediate deadline?” *YES / NO*

If **yes**, “When?” *[Write answer in matter description on Inquiry Sheet.]*

If the deadline is 2 weeks or less, state:
“Generally when a client comes to us with a short deadline, we have to work overtime and change work assignments within the firm. As a result, we charge a premium for quick turn-around matters. This premium can be as much as 25% over our normal rates. Will that be a problem for you?”

“Based on your answers, you are a candidate to become a firm client. The next step in the process is to set a convenient initial consultation with a firm attorney. During this consultation you and the attorney will discuss your situation and goals, possible courses of action, and the investment to proceed forward. Would you like to set a meeting?”

“I need to let you know that the fee for the Initial Consultation is $________ for up to one hour. Should I continue to set the meeting?”

If no, proceed with the following:
“I can understand your concern about the initial consultation fee. In his/her practice, Mr./Ms. _______________ has the opportunity to represent only a limited number of clients, so we work to be sure that Mr./Ms. _________________ works with the right clients. During the initial consultation Mr./Ms. ________________ will analyze your matter and discuss any questions you may have. Therefore, we begin the investment with the initial consultation.”

“I can refer you to the Bar Association. They might be able to get you the name of an attorney who offers free consultations.”

If yes, proceed as follows:
“Let me get some initial information for our system. Would you spell your full name for me? What is your address, telephone, fax and email?” *[Input into Time Matters]*

“Which is the best method to communicate with you (phone, fax or email)?”

“Mr./Ms. _________________ has the following times available to meet with you.”
[Provide 2 dates/times in accordance with the time template]

“Which works best for you?”

“Please name the opposing party(ies) in your matter.” *[Remind client to bring all documents that might relate to his/her issue.]*

Receptionist: “Do you have any questions for me?”

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ACTIONS:

- Calendar the Initial Consultation on Time Matters
- Calendar a reminder/confirmation call for Receptionist to make to the prospect one (1) business day prior to the scheduled meeting.
- Send Initial Consultation Intake Form with cover letter (reminding prospect of date and time of meeting, initial consultation fee paid at office, and directions to the office) and brochure to prospect.
- Run conflict check. Inform attorney at least two (2) days before consultation of results.

A. IF "I JUST WANT TO SPEAK WITH A LAWYER BY TELEPHONE," SAY:

Receptionist: "I'm sorry, Mr./Ms. ________________ does not offer free consultations, in person or over the phone. Mr./Ms. __________________ can meet for consultations by telephone. To do so, we'll have to receive the documents at least one day ahead of the consultation meeting and we'll run the consultation fee on a credit card one day before." *[Return to main script.]*

B. If caller is not a candidate because:

- Out of area – *refer off of referral list*
- "D" characteristics – *refer to "Young Hungries" (including refusal to pay I/C fee)*
- Rude – r*efer to Bar Association referral service*

C. If caller does not want to provide you with any information, say:

"As you may not know, any communications that you have with this office in connection with your matter are privileged according to the attorney/client privilege. This means that we cannot disclose or use that information and it is designed to facilitate communication between us. All of the team members of the law firm are bound by this confidentiality provision and we are committed to protecting our clients' interests."

D. If caller says "I just want to meet Mr./Ms. Attorney," say:

"I can send a firm brochure, Mr./Ms. _________________Curriculum Vitae and schedule a brief phone call. Some potential clients ask to meet Mr./Ms. _________________to determine whether they can work with him on a personality level. Is this the kind of call you are looking for?"

If yes, then:

"I can arrange a 5-10 minute telephone call for you where you and Mr./Ms. _________________can discuss business philosophies, his/her background, his/her experience and related matters which hopefully will give you a feel for whether or not you can work with Mr./Ms. _________________."

E. If the caller says, "no, I want to discuss my matter," then refer to item "A" above.

F. If the caller asks: "How much is this going to cost me?" say:

"Without knowing more about your matter, I can't give you price. However, before you leave the consultation, Mr./Ms. _________________will discuss fees with you and give you either a fixed fee or an estimate, with the firm's hourly rate. Mr./Ms. _________________'s hourly billing rate is $________."

Inquiry Information Sheet

FORM 18.06H

This form is used with the Potential Client Inquiry Call Script, Form 18.06G.

NAME:______________________________ Date and Time:______________________

Business: ____

Matter Description *(use prospect's words)*:

____

____

Did you feel you received good service from that attorney? YES/NO Why?

______________________________________ _____________________________________

____

Have you used the services of another attorney in this matter? YES / NO

If yes, who? ____

What is causing you to that about making a change?

____

____

Do you have an immediate <u>Deadline</u>? YES / NO

If yes, when?___________________

Opposing Party Names:

____

____

____

Address: ____ ________

____

____

Phone : ____

Facsimile: ____

e-mail : ____

1. Was the prospect impolite on the telephone? YES / NO
2. Was their first question, "How much is this going to cost me?" YES / NO
3. Do they mention that they know another lawyer who is cheaper? YES / NO
4. Did they resist paying a consultation fee? YES / NO

Intake and Evaluation Matrix: Trademark, Copyright, Entertainment

FORM 18.06I

Directions: Use this form as a screening device for new client intake. Write the number "1" in each blank that is applicable to your client. Each "column" should have only one number in a box. When the matrix is complete, add the numbers from left to right. Place the total in the "Total Per Row" column and multiple by the coefficient to obtain a score for each row. Write the total score in the "Total Score" blank at the bottom of the page. Calculate the "Case Rank" by circling the letter which is closest to the client's "Total Score" using the "Score Box". If applicable, fill in the "Retainer" and "Evergreen" amounts based on the case ranking.

Case Ranking	Client Cooperation /Credibility	Background/ Industry Experience	Availability of Assets	Level of business	Level of Education	Trademark / Copyright	Entertainment Matter	Referral Source	Total Per Row
A	Very Cooperative, Very Credible ________	5+ years ________	Very Available ________	Established ________	Masters or Doctorate ________	10+ catalog to administer and license ________	Music catalog Administration ________	Attorney who knows me ______	______ X 1 = Score: ______
B	Less Cooperative, Less Credible ________	2-4 years ________	Somewhat Available ________	Startup; but has plan + financial backing ________	Master's or Bachelor's ________	Filing multiple trademarks/ needs licenses _______	Key talent or producer in a TV show Indie Label Docs ________	Attorney who does not know me ______	_____ X 2 Score: _____
C	Un-cooperative, Not Credible ________	One year ________	Less Available ________	Initial startup, no plan; no money ________	Bachelor's, some college ________	Filing multiple copyright ________	Solo owned record label/ publisher ________	Non-attorney who knows me ______	_____ X 3 Score: _____
D	Irrational, Dubious Credibility ________	No experience ________	Not Available ________	Thinking of new venture ________	Little to None ________	One off? Copyright filings ________	Producer, rapper, poetry No contract Shopping Deal ________	Internet _____	_____ X 4 Score: _____

Total Score: ___________________________

Scoring Scale: 8 to 32 point scale

SCORE BOX
(The lower the score, the better. Circle the final rank.)

8 =	Perfect Client with Great Case	Rank = A
16 =	Good Client with Good Case	Rank = B
24 =	Difficult Client with Difficult Case	Rank = C
32 =	Very Difficult Client with Very Difficult Case	Rank = D

Retainer: ____________________

Evergreen: ____________________

Quarterly Review Questions:

Atty. Time Spent:	_______	hrs. x	$________	hr.	=	$__________
Assoc. Time Spent:	_______	hrs. x	$________	hr.	=	$__________
Staff Time Spent:	_______	hrs. x	$________	hr.	=	$__________
				Expenses	=	$__________
				Total Investment to Date		$__________
				Compare to Budget		$__________

f© Atticus______

Case Evaluation Questions:

1. With research, have new issues changed the case value?
2. Should the case be routed for completion, litigation, settlement, further research, referral or closure? (Circle One)

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Intake and Evaluation Matrix: Personal Injury

FORM 18.06J

Directions: Use this form as a screening device for new client intake. Write the number "1" in each blank that is applicable to your client. Each "column" should have only one number in a box. When the matrix is complete, add the numbers from left to right. Place the total in the "Total Per Row" column and multiple by the coefficient to obtain a score for each row. Write the total score in the "Total Score" blank at the bottom of the page. Calculate the "Case Rank" by circling the letter which is closest to the client's "Total Score" using the "Score Box".

Case Ranking	Liability	Causation	Settlement Potential	Pre-Existing Conditions	Damages	Prior Claims	Litigation Potential	Case Value	Total Per Row
A	Very clear ______	No causation problems ______	Both parties want to settle ______	No pre-existing condition ______	Catastrophic Death / Deformation Surgery/ Fracture Clear PTLD ______	None ______	High Recovery Potential ______	$100,000 + up ______	______ X 1 = Score: ______
B	Clear / Average ______	Some causation problems ______	Very Good ______	No pre-existing condition ______	Objective Surgery/ Fracture PTLD Likely ______	None ______	Medium Recovery Potential ______	$50,000 + ______	______ X 2 Score: ______
C	Average / Poor ______	Definite causation problems ______	Average / Poor ______	Limited pre-existing condition ______	Soft Tissue Surgery Fracture ______	Limited prior claims ______	Low Recovery Potential ______	$7,500 - $20,000 ______	______ X 3 Score: ______
D	Poor ______	Extreme causation problems ______	Poor ______	Pre-existing condition ______	No injuries Soft Tissue ______	Prior claims ______	Poor/No Recovery Potential ______	$0 - $7,500 ______	______ X 4 Score: ______

Total Score: ____________________________

Scoring Scale: 8 to 32 point scale

SCORE BOX
(The lower the score, the better. Circle the final rank.)

8 =	Perfect Client with Great Case	Rank = A
16 =	Good Client with Good Case	Rank = B
24 =	Difficult Client with Difficult Case	Rank = C
32 =	Very Difficult Client with Very Difficult Case	Rank = D

Retainer: ______________________

Evergreen: ______________________

Quarterly Review Questions:

Atty. Time Spent:	________	hrs. x	$________	hr.	=	$__________
Assoc. Time Spent:	________	hrs. x	$________	hr.	=	$__________
Staff Time Spent:	________	hrs. x	$________	hr.	=	$__________
				Expenses	=	$__________
				Total Investment to Date		$__________
				Compare to Budget		$__________
				Differential		$__________

Case Evaluation Questions:

1. Upon discovery, have new liability, causation, pre-existing conditions, damages or prior claims issues changed the case value?
2. Should the case be routed for completion, litigation, settlement, further research, referral or closure? (Circle One)

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Intake and Evaluation Matrix: Family Law

FORM 18.06K

Directions: Use this form as a screening device for new client intake. Write the number "1" in each blank that is applicable to your client. Each "column" should have only one number in a box. When the matrix is complete, add the numbers from left to right. Place the total in the "Total Per Row" column and multiple by the coefficient to obtain a score for each row. Write the total score in the "Total Score" blank at the bottom of the page. Calculate the "Case Rank" by circling the letter which is closest to the client's "Total Score" using the "Score Box". If applicable, fill in the "Retainer" and "Evergreen" amounts based on the case ranking.

Case Ranking	Client Cooperation / Credibility	Spousal Animosity	Availability of Assets	Attitude re: Children	Income Level	Opposing Counsel	Open to Settlement	Difficulty of Case or Court	Total Per Row
A	Very Cooperative, Very Credible ________	Amiable to Each Other ________	Very Available ________	Very Good, Will Protect Them ________	High ________	Respected, Easy To Work With ________	Very Open ________	Little Difficulty or Complication ________	_____ X 1 = Score: _____
B	Less Cooperative, Less Credible ________	Somewhat Amiable ________	Somewhat Available ________	Good, Somewhat Protective ________	Medium ________	Not So Easy To Work With ________	Less Open ________	Focused Effort on Some Elements ________	_____ X 2 Score: _____
C	Un-cooperative, Not Credible ________	High Level of Animosity ________	Less Available ________	Not Good, Will Use Them ________	Low ________	Very Difficult To Work With ________	Wants A Trial ________	Complex but not Urgent or Novel ________	_____ X 3 Score: _____
D	Irrational, Dubious Credibility ________	Desires Revenge ________	Not Available ________	Very Bad, Abusive ________	None ________	Impossible To Work With ________	Trial Expected ________	Very Demanding Issues/Time or Court ________	_____ X 4 Score: _____

Total Score: ___________________________
Scoring Scale: 8 to 32 point scale

SCORE BOX
(The lower the score, the better. Circle the final rank.)

8 =	Perfect Client with Great Case	Rank = A
16 =	Good Client with Good Case	Rank = B
24 =	Difficult Client with Difficult Case	Rank = C
32 =	Very Difficult Client with Very Difficult Case	Rank = D

Retainer: ____________________

Evergreen: ____________________

Quarterly Review Questions:

Atty. Time Spent:	_______ hrs. x	$________ hr.	=	$__________
Assoc. Time Spent:	_______ hrs. x	$________ hr.	=	$__________
Staff Time Spent:	_______ hrs. x	$________ hr.	=	$__________
		Expenses	=	$__________
		Total Investment to Date		$__________
		Compare to Budget		$__________
		Differential		$__________

Case Evaluation Question:

1. Upon discovery, have new issues changed the case value?
2. Should the case be routed for completion, litigation, settlement, further research, referral or closure? (Circle One)

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Intake and Evaluation Matrix: Estate Planning

FORM 18.06L

Directions: Use this form as a screening device for new client intake. Write the number "1" in each blank that is applicable to your client. Each "column" should have only one number in a box. When the matrix is complete, add the numbers from left to right. Place the total in the "Total Per Row" column and multiple by the coefficient to obtain a score for each row. Write the total score in the "Total Score" blank at the bottom of the page. Calculate the "Case Rank" by circling the letter which is closest to the client's "Total Score" using the "Score Box". If applicable, fill in the "Retainer" and "Evergreen" amounts based on the case ranking.

Rank	Potential Fee	Complexity of Matter	Client Attitude	Size of Estate	Referral Source	Other	Total Per Row
A	Very High _____	Complex _____	Very cooperative _____	$___ Million and above _____	Sends high-end profitable matters, not problematic _____	_____	_____ X 1 = Score: _____
B	High _____	Less complex _____	Cooperative _____	Between $____ and $____Million _____	Sends a mix of matters, some preferred and some less desirable _____	_____	_____ X 2 Score: _____
C	Medium _____	Simple _____	Somewhat problematic _____	Under $____ _____	Sends mostly low-end, unprofitable matters _____	_____	_____ X 3 Score: _____
D	Low _____	Basic _____	Difficult _____	Under $____ _____	Sends undesirable matter _____	_____	_____ X 4 Score: _____

Total Score: ___________________________

Scoring Scale: 8 to 32 point scale

SCORE BOX
(The lower the score, the better. Circle the final rank.)

8 =	Perfect Client with Great Case	Rank = A
16 =	Good Client with Good Case	Rank = B
24 =	Difficult Client with Difficult Case	Rank = C
32 =	Very Difficult Client with Very Difficult Case	Rank = D

Retainer:

____

Evergreen:

____

Quarterly Review Questions:

Atty. Time Spent:	________	hrs. x	$________	hr.	=	$__________
Assoc. Time Spent:	________	hrs. x	$________	hr.	=	$__________
Staff Time Spent:	________	hrs. x	$________	hr.	=	$__________
			Expenses		=	$__________
			Total Investment to Date			$__________
			Compare to Budget			$__________
			Differential			$__________

Case Evaluation Questions:

1. Have new issues changed the case value?
2. Should the case be routed for completion, litigation, settlement, further research, referral or closure? (Circle One)

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Intake and Evaluation Matrix: Criminal Defense

FORM 18.06M

Directions: Use this form as a screening device for new client intake. Write the number "1" in each blank that is applicable to your client. Each "column" should have only one number in a box. When the matrix is complete, add the numbers from left to right. Place the total in the "Total Per Row" column and multiple by the coefficient to obtain a score for each row. Write the total score in the "Total Score" blank at the bottom of the page. Calculate the "Case Rank" by circling the letter which is closest to the client's "Total Score" using the "Score Box". If applicable, fill in the "Retainer" and "Evergreen" amounts based on the case ranking.

Rank	Cooperation of Client	Credibility of Client	Flight Risk	Past Record	Case Value	Ability to Pay	Total Per Row
A	Low Maintenance/ Cooperative ____	High ____	None ____	None ____	High ____	High ____	____ X 1 = Score: ____
B	Low Maintenance/ Cooperative ____	Medium ____	Low ____	Minor ____	Medium ____	Medium ____	____ X 2 Score: ____
C	High Maintenance/ Not Cooperative ____	Low ____	Medium ____	More Serious ____	Low ____	Low ____	____ X 3 Score: ____
D	High Maintenance/ Difficult ____	None ____	High ____	Serious ____	None ____	None ____	____ X 4 Score: ____

Total Score: ____________________

Scoring Scale: 8 to 32 point scale

SCORE BOX
(The lower the score, the better. Circle the final rank.)

8 =	Perfect Client with Great Case	Rank = A
16 =	Good Client with Good Case	Rank = B
24 =	Difficult Client with Difficult Case	Rank = C
32 =	Very Difficult Client with Very Difficult Case	Rank = D

Retainer: ____________________

Evergreen: ____________________

Quarterly Review Questions:

Atty. Time Spent:	______ hrs. x	$______ hr.	=	$________
Assoc. Time Spent:	______ hrs. x	$______ hr.	=	$________
Staff Time Spent:	______ hrs. x	$______ hr.	=	$________
		Expenses	=	$________
		Total Investment to Date		$________
		Compare to Budget		$________
		Differential		$________

Case Evaluation Questions:

1. Have new issues changed the case value?

2. Should the case be routed for completion, litigation, settlement, further research, referral or closure? (Circle One)

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Client Inquiry Tracker

FORM 18.07

DATE OF INQUIRY CALL	NAME OF POTENTIAL CLIENT	SOURCE				POTENTIAL CLIENT *QUALIFIED?*	*QUALIFIED* POTENTIAL CLIENT BOOK CONSULT?	POTENTIAL CLIENT CONVERT TO CLIENT?
		YELL. PAGES	WEB	AD	REFERRAL SOURCE NAME			
	Total Inquiries	Total Y/P	Total Web	Total Ad	Total Referral Source	Total Qualified	Total Booked	Total Converted

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The Marketing Assistant

FORM 18.08

A marketing assistant can be your secretary, key assistant, an intern or part-time employee who will act as support person for your marketing efforts. They can leverage you to reach a far greater number of contacts than you would achieve solely with your own efforts.

Personality Traits and Experience

A person with experience or training in marketing, sales or public relations is usually well suited for this role. An individual with an active interest in the community and experience in volunteerism may also be a good fit. Even without specific experience, someone who is personable, has good phone skills and likes
to plan events may be capable. Additional traits to look for are those that are good at **follow-through, calendaring and database management.** A person who possesses the **ability to write well** can be extremely helpful to anyone who depends upon written materials for promotion such as articles and newsletters.

Activities For Your Marketing Assistant

- Schedule lunch/breakfast marketing meetings for you
- Manage database of clients and referral sources
- Plan and manage events
- Build and manage TOMA program – newsletter, email
- Manage birthday card list
- Assist in preparation for speaking engagements
- Prompt, or write, thank you notes
- Deliver gifts
- Buy tickets for your referral sources
- Prompt you into action when you stop marketing
- Write and distribute your press releases

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Press Release Sample

FORM 18.09

Use this form - or have your marketing assistant use this form - as a guideline when writing your press release.

FOR IMMEDIATE RELEASE
Capitalize all letters in this headline and place this title in the upper left-hand margin. Include the date of submission here. Try to keep the entire release to one page in length.

The Headline
A single sentence that gives summarizes the essence of your text. Put any articles, prepositions or conjunctions of three letter words or less in lowercase type.

The Dateline
List the date of your press release and the city it is issued from.

Lead Paragraph
Write a strong introductory paragraph to grab the reader's attention. Use the journalistic device of formatting your message to follow the Five Ws: who, what, when, where and why. While this paragraph should be a summary of what's to come in the rest of the text, if effectively written it hooks your reader and encourages them to read on. Keep your word count between 50 and 75 words.

Body
The main text of your press release is where you expand upon your news. Many journalists use the inverted pyramid technique in which the most critical information and any pertinent quotes are placed at the beginning. Since this will be the largest, most informative section, your word count should be between 200 and 225 words.

Firm Information
End your press release with a brief paragraph that describes your firm, its practice areas. Include a short history of the firm.

Contact Information
List the name, e-mail address and phone number of the person who wrote the press release and their qualification (i.e., Esq., Admin. Asst., etc.) to discuss the subject matter, as the newspaper's fact checkers will call to verify the info in the release before printing.

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The Laser Talk

FORM 19.01

A "laser talk" with a client, referral source, or prospective client is another, very effective conversational strategy.

In this type of conversation, you are marketing yourself by simply informing your listener about what you do. The tone is straightforward and educational. Being sensitive to your audience will tell you when a straightforward, factual approach is the most appropriate.

They will learn:

The specialty practice area of law you focus on.

The types of clients you help best -- specific, i.e. retirees, or women who have been recently widowed and need advice about their assets.

What you are committed to and why you make a difference for people.

Gear the tone of your dialogue to match your audience and speak of your practice in terms of the benefits your client receives. In other words make your introduction client-centered.

Building Your Laser Talk

I support ____.
(specific description of client)

in their desire to ____.
(benefit statement)

by means of ____.
(how one gets the benefit)

What's unique about my practice is ______________________________.

The Interview

FORM 19.02

Solicit feedback on your practice. It not only builds rapport and intimacy with your clients and influencers, it also serves the invaluable function of providing constructive criticism.

Business related questions can also be used for more than just gathering information. They build rapport -- especially when you solicit feedback and advice on your practice as we suggest below. Most individuals that you ask questions of will be flattered that you asked their opinions.

We recommend that you engage referral sources in questions about the practice of law and their past experience when dealing with lawyers. To see and hear firsthand the opinions and experiences of your influencers and clients, we recommend that you go out and interview three to five people who fall into these categories.

The Interview Script

I'm curious. I'm always in the process of enhancing my practice and would appreciate your opinion on a few things:

> *What are your top three frustrations when dealing with lawyers?*
> *Why do these frustrate you?*
> *Tell me about those things that lawyers have done in the past that made you decide never to go back to them, or refer people to them.*
> *If you were to get outstanding service from a lawyer -- how would you describe it?*

If you listen, they will tell you what type of lawyer they enjoy working with and what type they don't . They will tell you things they are not revealing to any other attorney. In other words, they will reveal their expectations. If you can meet or exceed their expectations, they will gladly return to your firm, or refer prospective clients to you again and again.

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Storytelling Tip Sheet

FORM 19.03

WELL DELIVERED STORIES
Well-delivered stories can be anything from long, involved tales, to the short forms of analogies and anecdotes. Both can be an extremely effective means of communicating with a prospective client or referral source. With stories, you can build in associations that your referral source, client or prospective client can relate to and understand.

STORIES, ANECDOTES & ANALOGIES
Stories, anecdotes and analogies are practical because they can be used to deliver your communication in a simple but powerful fashion. A lot of information can be communicated in a brief amount of time and in an entertaining manner. If you can deliver your story with humor, so much the better. Used appropriately, humor can be enormously effective in support of all your conversational strategies.

THREE PARTS TO A TYPICAL TALE

1. **The Context**
   The context or backdrop of the story often contains many more details than are needed, but serves to set the scene and draw the listener in.

2. **The Characters**
   Here the main characters of the story are placed in a dilemma, presented with a challenge, or forced into a conflict. The listener is engaged a bit more and should feel some tension.

3. **The Climax**
   During the climax, the problem is resolved and the listener is left with a sense of relief. There is triumph over adversity and hopefully, a hero.

The Storytelling Script

Craft a meaningful story by contemplating your response to the following phrases. Remember to use these stories when you have occasion to speak about yourself either socially or professionally.

- I became a lawyer because...
- I am committed to a certain practice or specialty of law because...
- The type of people (my primary client) I like to help are...
- The reason I like to help these people is...
- I make a difference for people (or I am more caring) because I...

Recall other stories that relate your effectiveness as a lawyer. Don't bore your listener with a thinly disguised list of your accomplishments -- impart information that shows how your clients genuinely benefit from your professional skills. Be prepared to share sincerely about:

- a case you just won
- an award you just received
- your background

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Top 20 Appointment Setting Script

FORM 19.04

Setting a Top 20 Appointment on behalf of the Attorney

Staff person: Hello, I'm ___________, and (insert attorney's name), asked me to give you a call.
He/She would like to meet with Mr./Mrs. ________________:

Option #1
To thank him/her for sending so much business our way.

Option #2
Because he/she hasn't seen him/her in some time and would like to catch-up!

Mr./Mrs. (insert attorney's name) is available on
________________, ________________ and ________________.
Which day works best for Mr./Mrs. ________________?

Perfect! I'll let my attorney ________________ know.
Does Mr./Mrs. ________________ have a favorite restaurant?
Great! I'll look into that and be back in touch shortly with details.
Thanks again. I appreciate your help! Good bye.

~ IF THE DATES DO NOT WORK ~

When IS Mr./Mrs. available for lunch?

I'll review Mr./Mrs. ______________ 's calendar and
get back to you on that that date. Thank you!

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Top 20 Appointment Setting Script
Attorney With Attorney

FORM 19.04A

Attorney: Hi, this is ________________ .
How are you? It's been awhile. The reason I am calling is that
I'd like to get together some time soon. . .

Option #1
to say thank you for sending so much business our way.

Option #2
because I haven't seen you in awhile and I would like to catch-up!

I'm available on
________________, ________________ and ________________.

Which day works best for you?
Perfect! I've got it on the calendar.
I'll ask my Assistant to contact your Assistant
shortly with details.

Do you have a favorite restaurant or type of food?
I'll tell my Assistant so she can make arrangements.
I look forward to seeing you soon. Good bye.

~ IF THE DATES DO NOT WORK ~

When ARE you available for lunch? I'll try to accommodate.
Perfect! I've got it on the calendar.
I'll ask my Assistant to contact you shortly with details.

Top 20 Appointment Setting Script
Staff With Staff

FORM 19.05

Hi! This is _________________ with Attorney _________________' office.
May I speak with Mr./Mrs. _________________ 's Assistant please? TY

Hi, _________________ (Assistant's Name).
This is _________________ with Attorney _________________' office.
How are you doing? (Chit chat, if appropriate)

Well, the reason I'm calling is that
I would really like to take you to lunch.
We've had a chance to chat briefly in the past
but I would love to spend some time with you
in order to get to know you better.

CONTINUE IF YOU FEEL COMFORTABLE...
I'm anxious to hear more about what you do at _________________.
Who knows? We may be able to send some business your way
in the future... or vice versa...

If you're interested, I'm available on
_________________ and _________________ at noon.
Does either one of those days work for you?
(If those dates don't work, find one that does!)
Perfect! I marked my calendar so it's official.

Do you have a favorite restaurant or type of food you like to eat?
IF YES -- I'll try to make arrangements for us to eat there.
IF NO -- OK, I'll choose and get back in touch with details.
Thanks again, _________________!
I look forward to it.
Good bye.

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The Cross-Selling Script

FORM 19.06

If Meeting Client for the First Time

Before we get started with working on your matter, Mr./Mrs. _____________, I would like to welcome you to our law irm and tell you a little bit about what we do here. We have the ability to help you with many of your legal needs, including (list services):

If during the course of our conversation today, you have a question about anything in those areas, please feel free to ask. If I cannot help, I will send you to someone who can!

After Initial Visit

I really enjoyed working with you and getting to know you. I wanted to make our team available to you for other legal problems as well. We have the ability to help you in other areas, such as (list services):

Please don't hesitate to turn to us for help. If the matter is beyond our level of expertise, we will refer you to someone we trust!

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Referral Source Introduction Script

FORM 19.07

When you request one of your present influencers to set up a meeting between you and one of their associates, it might be helpful to coach them on the contents of their conversation.

Help them to help you by creating a very purposeful, but not overly rehearsed conversation.

(For this to work, their own words must be used. They can use the script below as a foundation.)

The Interview Script

I have been working with a local attorney over the past _______ (months,years) who I've really come to __________ (admire, respect).

I've told him/her about you because he/she is building his/her practice. He/She is very __________ (straightforward) and__________ (intelligent). I've worked on _______ (X) cases with him/her and I highly recommend him/her as an attorney whom I trust...
(Closing #1)

I've told him/her to give you a call. The __________ (tax, labor...) laws are so complex, he/she would really be an asset to your business.
(Closing #2)

I've told him/her to give you a call because you are both very __________ (hardworking, committed) and you may have a need for his/her services in the future.

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Marketing Scripts

FORM 19.08

Courtesy of Atticus Client, Richard Burt, Daytona Beach, FL

Business Generation Conversations

Purpose

- ❑ to explain what we do, for whom and why
- ❑ to build rapport, relationship
- ❑ to get an immediate referral of a matter from a client
- ❑ to get future referrals of matters and clients
- ❑ to identify and get introduced to potential clients and referrers

Approach

- ❑ Ask questions, listen, reflect back
- ❑ Acknowledge the person's strengths

Introductory (Laser) Statement

- ❑ "We help businesses (mainly in the construction industry) resolve their disputes in less time, with less money, aggravation and risk (with little or no litigation) - so they can stay productive & profitable." ("We practice resolutionary advocacy - advocacy focused on resolution")
- ❑ "We also help businesses handle their transactions, drawing when necessary on the resources of professionals in other disciplines (such as accounting for example) to provide a multi-disciplinary approach to achieving the client's objectives - again, to keep them profitable."
- ❑ "We keep business going"

With An Existing Client

- ❑ *[to get an immediate referral of a new matter]*

  - ❑ "How's business?" "No, really, what is your most pressing problem/challenge right now?"

  When a current frustration reveals an action-critical situation or problem that needs to be addressed immediately:

  - ❑ "<u>What's at stake</u> if this matter is not resolved favorably?"

  - ❑ "<u>We can help</u>. We can....."

    e.g., ...do a 'Needs Analysis' where we will help you....
    Refine your <u>analysis</u> of the problem,
    Identify your core <u>interests</u> and <u>objectives</u>,
    Determine what <u>methods</u> are needed to achieve those objectives,
    Understand the <u>resources</u> needed...and when they will be needed,
    Clarify your <u>expectations</u> from a lawyer in this situation.
    Identify the best <u>attorney</u> to help you resolve the dispute."

  - ❑ <u>"When can we start?</u>

To get future referrals of matters

- ❑ "We like to get together periodically with our clients to take a step back and look at their business long term, learn what's happening, why and how we can help"

- ❑ questions

  - ❑ "What's been happening with your business over the last 12 months?"

    - ❑ "Is it growing? Shrinking?"
    - ❑ "What are the reasons?"
    - ❑ "What problems are getting in the way?"
    - ❑ "Any problem with collections?"

  - ❑ "What trade organizations do you belong to?"

    - ❑ "I would like to attend a meeting with you sometime"

  - ❑ "What (accountant) (NTO service) (bonding agent) (banker) to you work with?"

- ❑ Give laser talk

- ❑ "You've referred various legal matters to us."

- ❑ questions *[Note: Be silent while waiting for answers]*

  - ❑ "I want to be sure we're handling these matters the way you want them handled."

  - ❑ "Did we handle it okay?" "No, really, I want to know about anything at all that bothered you about how it was handled."

- ❑ close

  - ❑ "Thanks. I've really enjoyed helping (you) (name) (the people you have referred to me). Please think of me again when you or someone you know needs my help."

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To get an introduction to potential clients & referrers

- ❑ *when a potential client or referrer is mentioned* "I've heard good things about him. I would like to talk with him about what we do in case he ever needs the services we provide. (Do you think you could arrange an introduction, possibly over lunch?) (Would you mind if I called him, saying that you suggested he and I should meet?)"

- ❑ *when a potential client or referrer is sought*
  (Note: Use only with a person with whom you have a high level of rapport developed over 6 months to 1 year)

  - ❑ "Can I ask you something?"
  - ❑ Give laser talk.
  - ❑ “Things are going very smoothly in my practice right now and I have the opportunity to grow.”
  - ❑ “My practice depends entirely on referrals from people who I respect and admire - people like you.”
  - ❑ “Can you think of anyone who I should meet - business owners who might need our help from time to time or someone who might get asked for the name of an attorney who works with businesses?”
  - ❑ *(if no name offered)* “Well, if you think of anyone, would you give me a call?”
  - ❑ *(if name offered)* “What do you respect or admire about him?”
  - ❑ “I would like to meet him and talk with him about what we do in case he ever needs the services we provide. (Do you think you could arrange an introduction, possibly over lunch?) (Would you mind if I called him, saying that you suggested he and I should meet?)”
  - ❑ “Thanks.”

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With An Existing Referrer

- ❑ *[to get future referrals of clients]*
  - ❑ Give laser talk.
  - ❑ “You’ve referred business people to us.”
  - ❑ questions
    - ❑ “I want to be sure we’re handling these referrals the way you want them handled.”
    - ❑ "Did we handle it okay?" "No, really, I want to know about anything at all that bothered you about how it was handled."
      [Note: Be silent while waiting for answer]
  - ❑ close
    - ❑ "Good.. Now, when you refer someone to me, I know how you want the referral handled.”
    - ❑ [and/or...] “I really enjoyed helping (name) (the people you have referred to me). Please think of me again when you have someone who needs my help.”

- [ ] *[to get an introduction to potential clients & referrers]*

  - [ ] *<u>when a potential client or referrer is mentioned</u>* "I've heard good things about him. I would like to talk with him about what we do in case he ever needs the services we provide. Do you think you could arrange an introduction, possibly over lunch?"

  - [ ] *<u>when a potential client or referrer is sought</u>*
    (Note: Use only with a person with whom you have a high level of rapport developed over 6 months to 1 year)

    - [ ] "Can I ask you something?"

    - [ ] Give laser talk.

    - [ ] "Things are going very smoothly in my practice right now and I have the opportunity to grow."

    - [ ] "My practice depends entirely on referrals from people who I respect and admire - people like you."

    - [ ] "Can you think of anyone who I should meet - business owners who might need our help from time to time or someone who might get asked for the name of an attorney who works with businesses?"

    - [ ] *(if no name offered)* "Well, if you think of anyone, would you give me a call?"

    - [ ] *(if name offered)* "What do you respect or admire about him?"

    - [ ] "I would like to meet him. Do you think you could (arrange a lunch?) (give him a call and tell him I'll be calling him so I can follow-up?)"

    - [ ] "Thanks."

With Another Attorney

- ❑ *[to get future referrals of clients]*
  - ❑ "Who do you send your (conflict work) (business clients) to?"
  - ❑ "I was thinking the other day that I really don't know everything you do and how you do it. When I have a conflict or a request outside my area of practice, I would like to send him your way."
    - ❑ "What area do you focus on?"
    - ❑ "What technology are you using?"
  - ❑ Give laser talk.
  - ❑ "Have you referred a business owner to another attorney in the last year or two?"
    - ❑ "Did anything bother you about how the matter was handled?"
    - ❑ "If you were to refer a business to another attorney, how would you expect the matter to be handled?"
  - ❑ "I'll try to refer you business wherever possible. Even if I don't have the opportunity to do so, I can support you this way. If you refer a business to me, I'll certainly handle the matter as you would expect."

With A Potential Client

- ❑ *[to get future referrals of matters]* "I want to learn about you & your business and I want to tell you about me & my firm so if we need each other in the future, we'll know who to call."

    - ❑ "Tell me about your business"

    - ❑ "What do you like most about what you do?"

    - ❑ "What's been happening with your business over the last 12 months?

        - ❑ "Is it growing? Shrinking?"
        - ❑ "What are the reasons?"
        - ❑ "What problems are getting in the way?"
        - ❑ "Any problem with collections?"

    - ❑ "What trade organizations do you belong to?"
      (po: "I would like to attend a meeting with you sometime")

    - ❑ "What (accountant) (NTO service) (bonding agent) (etc.) to you work with?"
      (po: "I would like to meet him.")

    - ❑ "Have you used an attorney to help you with a legal matter within the last year or two? On a scale of 1-10, how would you rank the experience with your attorney?"

        - ❑ "Generally, what bothers you about dealing with lawyers?"

        - ❑ "If you were to refer a legal matter to an attorney, what would you expect from the attorney?"

    - ❑ Give laser talk.

    - ❑ "I would enjoy helping you with your legal matters"

    - ❑ "Please think of me"

With A Potential Referrer

- ❑ *[to get future referrals of clients]* "<u>I want to learn about you & your business and I want to tell you about me & my firm so if we need each other in the future, we'll know who to call.</u>"
  - ❑ questions
    - ❑ "Tell me about your business"
    - ❑ "What do you like most about what you do?"
    - ❑ "What trade organizations do you belong to?"
      - ❑ "I would like to attend a meeting with you"
    - ❑ "What do you like to do for recreation?"
  - ❑ Give laser talk.
  - ❑ more questions
    - ❑ "Have you referred a business to an attorney in the last year or two?"
    - ❑ "Did anything bother you about how the matter was handled?"
    - ❑ "If you were to refer a business to an attorney, how would you expect the matter to be handled?"
  - ❑ close
    - ❑ "Maybe we can do some joint marketing together, centered around activities that we like to do."
    - ❑ "I'll try to refer you business wherever possible. Even if I don't have the opportunity to do so, I can support you this way. If you refer a business to me, I'll certainly handle the matter as you would expect."
    - ❑ [or...] "I would enjoy working with you on any matters you're working on needing the assistance of an attorney"
    - ❑ [or...] "Please think of me when you're presented with a legal matter"

- ❑ *[to get future referrals of clients*] "<u>You're a successful, respected person in your field"</u>
  - ❑ Give laser talk.
  - ❑ "Over the next 2 years, I want to double the size of my practice, which comes solely from referrals from people I respect and admire"
  - ❑ "I would appreciate your advice"
  - ❑ questions
    - ❑ "<u>Have you referred a business dispute or someone with a business dispute to an attorney in the last year or two?</u>"
      - ❑ "Did anything bother you about how the matter was handled?" *[Note: Be silent while waiting for answer]*
      - ❑ "If you were to refer a business dispute or someone with a business dispute to an attorney, how would you expect the attorney to handle the matter?" *[Note: Be silent while waiting for answer]*
    - ❑ "<u>To get the word out to those who can use my services</u>....
      - ❑ "What types of businesses should I be talking with?"
      - ❑ "Who specifically do you think I should I talk with?"
    - ❑ "<u>What trade organizations do you belong to?</u>"
      - ❑ "I would like to attend a meeting with you"
  - ❑ close
    - ❑ "I'll try to refer you business wherever possible. Even if I don't have the opportunity to do so, I can support you this way. If you refer a business dispute or someone with a dispute to me, I promise you I'll handle that matter as you would expect."

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Asking for Referrals

FORM 19.09

ASKING FOR REFERRALS

The brief, scripted phrases and statements such as those listed below are not aggressive sounding, but have the power to produce significant results for your practice. Whether that means you motivate your clients to send referrals or you turn a casual friend into a friendly referral source, you possess the power to make these changes by uttering the right words at the right time. Don't rely upon the client, friends or potential referral sources to automatically know you welcome referrals. It is up to you to educate them. You'll notice that most of these statements start with a compliment to smooth the way for the actual request.

HOW TO ASK CLIENTS FOR REFERRALS

This first group of statements is intended for use with clients. Most of our attorney clients use them at the conclusion of a case, though there might be points during a case when comments like these are appropriate. The better rainmakers we work with make it a point to take well-connected clients out to lunch and conduct informal exit surveys. Before they finish, they work in their version of the statements listed below.

> *Steve, we've really enjoyed working with you on this matter. Our practice has been built on referrals from satisfied (or good, or great) clients like you. Please don't hesitate to mention our name to others we might be able to help.*

> *Rachel, it was a pleasure getting to know you. Please keep in mind we'd be happy to help any family or friends of yours who need legal services in the future.*

> *George, I really enjoy working with clients like you and I'd appreciate it if you would mention our firm to anyone else that could use our assistance.*

> *Grace, I thank you for your business and would appreciate it if you passed my name on to anyone that you feel I could help.*

> *Referrals from good clients like you, Carole, are the foundation of my practice. Thank you for your business and feel free to recommend us to others.*

> *Ben, I built my practice by working with great clients like you, please let us know if we can be of further help to you or assist your friends or family in any way.*

> *Judy, if you feel we served you well, please let others know what we can do for them.*

HOW TO ASK REFERRAL SOURCES FOR MORE REFERRALS

Set the stage for your request by asking your referral sources out to lunch to thank them for a client they've recently referred. Or, if you haven't been good at thanking your referral sources along the way, make a date to thank them for all the clients they've referred in the past:

> *Thank you for thinking of us with your many referrals, Tom. Though we're not good at saying it sometimes, we really appreciate the clients you send and make every attempt to take great care of them.*

> *I've enjoyed working with all the clients you've sent, Chris. Please don't hesitate to send anyone else you work with that could use our services.*

> *Pam, thanks for sending Hugh over to see me. I really enjoyed working with him and would certainly do my best to help any of your other clients.*

> *Please don't hesitate to send us clients – we're never too busy to take care of anyone you might refer, Larry. In fact, my receptionist has special instructions to interrupt me immediately whenever one of your referrals calls.*

HOW TO ASK A POTENTIAL REFERRAL SOURCE FOR REFERRALS

Here's another situation that you may need a script to navigate. You've briefly met a potential referral source and want to cultivate him or her, but don't quite know what to say to initiate the process. Use the following script to get you over the hump:

> *Why don't we get together and go out to lunch next week? I'd enjoy learning more about your business and could tell you a little bit about mine. Perhaps we can send clients to one another in the future…*

> *I'd like to invite you over to my office to learn more about what you do and see if there's a way we can network in the future…*

HOW TO ASK FRIENDS AND FAMILY FOR REFERRALS

Here's another situation in which having a few simple scripts can be helpful: you have a friend family member who has the ability to send you clients, but for some reason, never has. First, make sure they know what you do. You'd be surprised how many of your friends and acquaintances don't really understand what you do. Your Laser Talk is helpful here. Once they understand the type of law you practice and who you help, use one of the following scripts to take the relationship to the next level:

> *John, I'd enjoy building more of a business relationship with you to see if I can be of some service to your clients in the future. Why don't we meet for lunch next week and talk about it?*

> *Jason, I've built my practice on referrals from a lot of people in this community and it would be a privilege to work with anyone you think could use my services. Why don't we get together next week and talk about it?*

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Sample Thank You Letters

FORM 20.01

Sample 'First Meeting" Thank You Note

This is a brief, friendly thank you note that should be handwritten. You can extend this by inserting more text between the opening and the close.

Dear ________________ (*name*):

I enjoyed meeting with you yesterday and learning more about you and your business _____________________ (*insert an appropriate comment about their business*).

(*Closing Option #1: if the person is going to be a client*) I look forward to meeting with you again in a ____ (*month, week*). I will call you to set a date. Feel free to call me if you have any questions in the mean time.

(*Closing Option #2: if person is not to be a client*) Thanks for taking the time out of your busy schedule to meet with me.

Sincerely,

Sample 'Referral' Thank You Note

This thank you note is intended for the influencer that has sent you a moderate amount of referrals. It can be embellished or simplified to reflect a greater or lesser amount of referrals from a particular source. Create a system for sending out thank you notes. Keep them very handy and easy to fill out by hand.

Dear _________ (*name*),

Yesterday I had the pleasure (*or opportunity*) of meeting _________________________ (*name*), the client you referred to my office.

We had a good conversation and plan to move forward in working together. I will keep you informed (*if appropriate*) of our progress at all times.

I thank you for your faith and confidence in my ability to be of assistance to your clients. Please don't hesitate to call me with any questions.

Sincerely,

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Cross-Selling Tips

FORM 20.02

Why Cross-selling is Important

Enhanced Profitability:

Once you've made the initial investment to acquire a client – whether that investment took the form of time, money or energy, any further business done with that client is more profitable. In fact, the more recurring business that a firm enjoys, the more profitable that firm can be, since the marketing costs are minimal with returning clients.

The Hidden Benefit:

Here's an additional motive to explore cross-selling: if and when you ever want to sell your practice, one of the most important factors in determining its value will be the percentage of clients who return for additional services. Developing additional and complementary services for your client base, then successfully cross-selling those services, is not only profitable in the short run – it has the potential to make your practice *much more valuable* when it's worth is calculated in the valuation process.

This next form (Form 20.03) is for the attorney who is cross-selling within his/her own client base. It can be modified to suit cross-selling a client who has worked successfully with one member of a legal firm and is judged to be a candidate for other firm services.

Along with this letter to alert your client of a legal concern, comes an "offering." In this case, the offer is to attend a small information session about a legal problem or opportunity. Alternatively, your offer could be an invitation to consult with you (at no charge) to have the client's questions about a particular issue answered. This is a "loss-leader" strategy which is not appropriate for all practices, but when used well, can lead to further business.

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Cross Selling Letters

FORM 20.03

Dear _______________________:

The new ___________ law is becoming more and more complicated. There are many aspects of it that may affect you (or your interests). Because you have placed your trust and confidence in me in the past, I feel I should keep you informed of changes in the law that may have important consequences for you (or your business).

Many people are not making the best use of this law simply because they are uninformed. I believe you should have the opportunity to learn what your options are and how this change affects you.

In order to remedy this situation, I am holding a small, informal information session at my office on _______ at _______. Please join me and get your questions answered.

Give us a call at _______________ to RSVP. I look forward to seeing you again.

ALTERNATE CROSS-SELLING LETTER

Dear ________ (*name*):

Here at (firm name) we've begun the process of updating our past client files. We realized we had not heard from you for some time. We would like to take this opportunity to say we've enjoyed working with you in the past and express our willingness to assist you in any further legal matters. Our firm has grown and we now include ______________ (tax law, estate planning, etc.) as part of our services.

Give us a call or drop by if we can be of additional help. We will make a ½ - hour complimentary consultation available to you if your need to have any questions answered. Please give us a call at _________.

We look forward to seeing you again.

Sincerely,

(your name)

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Alternate Cross-Selling Letters

FORM 20.04

This is a sample cross-selling letter from a real estate attorney informing his/her client of further services provided by the firm.

Dear __________________:

We at (firm name) enjoyed meeting and working with you on the purchase of your new home. We want to take this opportunity to again offer our congratulations.

In addition to real estate transactions, our firm has expertise in a wide variety of legal matters including the following:

- Corporate Law
- Estate Planning & Probate
- Family Law

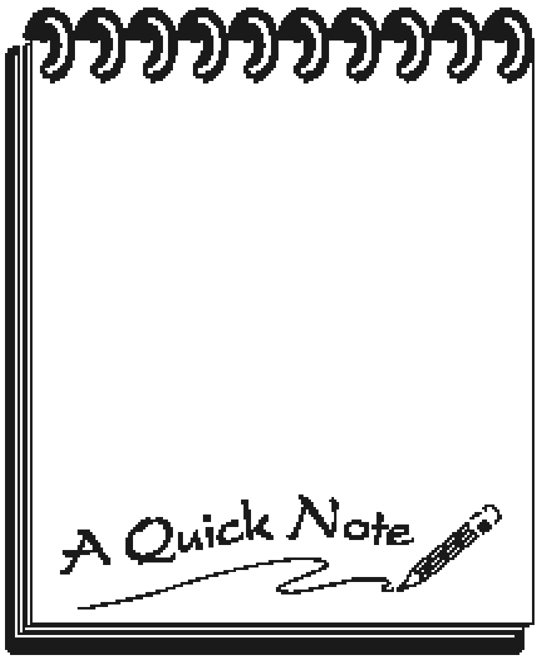
We would be delighted to assist you in any future matters or transactions in which you may need the assistance of an attorney. We offer an initial one-half hour consultation at no charge to you.

Please give us a call if we can be of further assistance.

Sincerely,
(your name)

Article Attachments

FORM 20.05

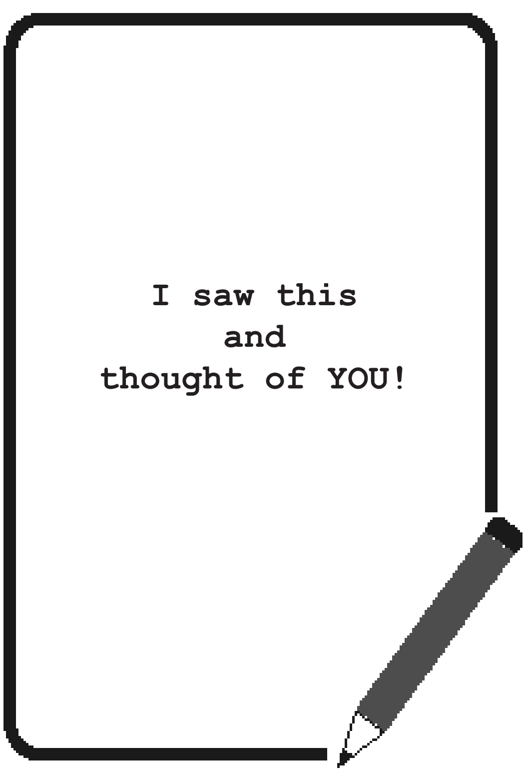


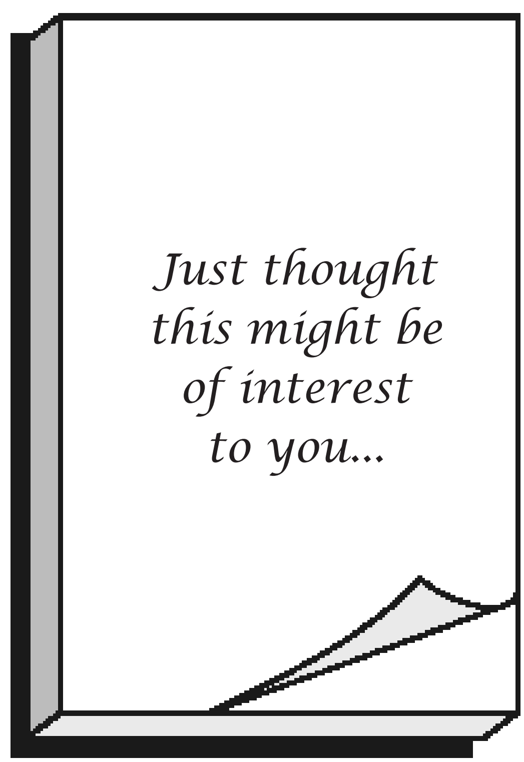
Copy on colored paper.

Cut on dotted line
and affix to
clippings, articles,
coupons/certificates
of interest to your
referral source(s).

Personalize & mail to create
"Top of Mind Awareness"

(Use a postage stamp rather
than a meter when possible.)





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General Event Planning Tip Sheet

FORM 21.00

Purpose:___________________________________
Location: **Date:**

List #1 -- What You Need TO BUY/RENT (Select appropriate items)

- ☐ Invitations
- ☐ Centerpiece(s)
- ☐ Scented Candles
- ☐ Tables/Chairs
- ☐ Space (Hm, Ofc, Hotel)
- ☐ Name Tags/Table Tents
- ☐ Entertainment: Pianist, Harpist, Carolers dressed like Dickens-era (high school/college), or a visit from jolly ole Saint Nick

FOOD should reflect abundance and luxury. Holidays are a time to indulge. Do NOT skimp on your menu!

Consider:

whole tenderloins
the finest glazed ham
fresh smoked turkey
sides of salmon

Check to see if a good local caterer is available to prep & serve the food.

DRINKS:

(Full serve or self-serve bar)

Consider:

- ☐ Wine
- ☐ Cocktails
- ☐ Specialty coffee/teas
- ☐ Egg Nog
- ☐ Hot Apple Cider
- ☐ Soft Drinks
- ☐ Spring/Tonic Water, Club Soda

GIFTS: Gifts can be funny, serious or delicious. Wrap gifts or drop them in a party bag tied off with a festive ribbon. Place gifts at table settings, display them in a decorative basket near the door to hand to guests as they leave, or ask Santa to pass them out! (Recruit a friend who's an amateur photographer, or hire a professional, to capture special memories on film which you can frame and mail or hand deliver afterwards.)

List #2 -- What You Need TO DO BEFORE the Party (if applicable)

30-60 days in advance...

- ☐ Determine location & date
- ☐ Select/Order ALL items needed from List #1 above
- ☐ Develop the guest list (see your Top 20 Roster & 21.01)
- ☐ Choose/hire/meet ALL help

3 - 4 weeks out:

- ☐ Buy stamps/mail invitations

2 weeks in advance...

- ☐ Wrap gifts
- ☐ Schedule a massage for the day of your party
- ☐ Schedule appt with hair stylist
- ☐ Purchase/rent party attire
- ☐ Order flowers

1 - 5 days in advance...

5 days out:

- ☐ Courtesy call to those who haven't RSVPd

1 - 2 days out:

- ☐ Set-up room
- ☐ Pick up/receive centerpieces
- ☐ Cut checks for help. Get cash for tips.

List #3 -- What You Need TO DO THE DAY OF the Party

- ☐ Relax - Try a massage!
- ☐ Get hair cut/styled.
- ☐ Get dressed a couple of hours before guests arrive.

- ☐ Ask guests about hobbies, family, pets, current events, a play, movies, an art exhibit.
- ☐ Listen, make eye-contact, look interested, compliment others. Tell a funny story.

- ☐ DO NOT permit clean-up until guests have left. It will make guests uncomfortable and ruin the atmosphere of the party!
- ☐ Go to bed and sleep in!

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Firm Golf Tournament

FORM 21.01

WHAT AND WHY

A firm golf tournament is a large high profile event that is good for positioning the law firm positively in the community and enhancing its image.

The purpose of this event is to build rapport with existing referral sources. This is also an opportunity to meet new influencers as you will invite your players to bring friends and associates.

WHO TO INVITE

To begin the process, look in your database of referral sources. Invite those people with whom you would like to build more rapport. As the tournament host, plan on not playing in the tournament. This will allow you to visit all the golfers during the event. Invited guests can include your Top 20 List, other attorneys, CPAs, judges, sports celebrities and bar officials.

WHERE TO HOST YOUR TOURNAMENT

Choose a local, but highly desirable local golf course that most of your players would be eager to play.

WHEN TO HOST YOUR TOURNAMENT

Once a year on a Friday or Saturday when the weather will accommodate your plans.

NOTES

Pick an appropriate name for the tournament. You can use your firm name or a memorial reference. One firm chose to name their event "The Barrister's Cup".

AWARDS

Create a trophy or award, and imprint giveaways with your firm name (golf tees, hats, shirts, umbrellas, etc). You can visit www.drawingboard.com for ideas/products. If the tournament is held in the morning, present awards during a cocktail hour. Invite the president of your local bar association, or a judge, to present the trophy or award.

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Reverse Seminar / VIP Lunch

FORM 21.02

WHAT AND WHY

A reverse seminar is a lunch-time event that gives the guest(s) of honor a chance to be "center stage" and talk about themselves and their business. This seminar can be an informal event with fancy "brown bag" lunches, or a more formal catered affair.

The purpose of this event is to build know/like/trust and rapport. To give your law firm the opportunity to discover how to help the person in the future. To hold an opportunity for cross-selling other firm services to the client.

WHO TO INVITE

Invite a new or existing client who is capable of sending recurring business; or an influencer who is capable of influencing others to use your services. Be sure to invite any firm partners that might have an interest in getting to know the guest of honor. A few examples of guests include a small business owner (plus management team) or an accounting firm with a couple of partners.

WHERE TO HOST YOUR EVENT

You can hold the seminar at your law firm in the conference room - if you have sufficient space to hold the guests as well as your own firm members). If you don't have the space, you can hold it in a quiet corner or private area of a nice local restaurant.

WHEN TO HOST YOUR EVENT

12PM to 1PM is typical, though an after-hours event can work as well.

NOTES

Be sure to provide a good showing of firm members or the event will be a disappointment to the guest of honor. Invite the appropriate members of your law firm. If your firm is small, include your Designated Hitter/Paralegal and other staff members to increase attendance.

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Firm Open House

FORM 21.03

WHAT AND WHY

The purpose of a firm open house is to show off new or remodeled office space; to showcase new technology; introduce a new attorney you recently hired; a chance for your partner's Top 20 to meet your Top 20 and cross-sell; celebrate an award or special recognition

The purpose of this event is to build know, like, trust and rapport with your influencers.

WHO TO INVITE

Your invitations can be written or verbal, and should be made at least two weeks prior to the event. Ask your invitees to RSVP at least three days prior to the event so that the food orders can be adjusted. Invited guests include your Top 20 List, other attorneys, staff with whom your firm often works, judges, bar officials and selected clients.

WHERE

Hold the open house at your law firm. After all, the reason you hold an event like this is to bring people to your office. Use your conference room to set up drinks and/or finger foods. Your food and beverages can be catered for a formal effect or homemade if you prefer a casual approach.

WHEN

Typically during the work week between the hours of 4 PM-6 PM. Invite people to stop by after work. Wrap things up by 9 PM-10 PM. The idea is to maximize the number of people you can accommodate over a 3-4 hour period of time. Remember to read through your notes before the event to refresh your memory of spouses' names, kids' names and sports affiliations. You want to be able to converse with referral sources having the right information at hand.

It's also a good idea to sit down with your partners (if you have them) in advance of this gathering and strategize with them about who you'll introduce to them. Discuss who you'd like to introduce to your partners and discuss who they'll introduce to you to maximize any cross-selling opportunities.

Holiday Event

FORM 21.04

WHAT AND WHY

A holiday event is a festive celebration that helps spread good will and cheer. It is ideal for positioning the law firm positively in the community and enhancing its image.

The purpose of this event is to build “know, like and trust” with influencers.

WHO TO INVITE

Invited guests can include your Top 20 List, other attorneys, judges, bar officials, physicians, CPA’s, small business owners, staff, and family members. Inviting spouses is optional, depending on the size of your group.

WHERE TO HOST YOUR EVENT

You can host your event at your firm, a club house or your home. Choose a spot that will allow enough room for mingling comfortably with your guests. You don’t have to restrict yourself to indoor locations during the warmer seasons. Many firms have hosted picnic events for the 4th of July in public parks. Other firms have hosted barbecue events in large tents in their parking lots, complete with musical entertainment and games. Some law firms “piggy back” onto public events by inviting guests to view parades from their offices or park in their parking lot for easy access to other events, such as an art festival or concert in a nearby park.

WHEN TO HOST YOUR EVENT

Once a year during the holiday of your choice. Since so many firms focus on Christmas, choosing another holiday will allow you to stand out. An event to welcome the New Year is an option, along with President’s Day, Valentine’s Day, Memorial Day, the 4th of July or Labor Day. Thanksgiving events are also popular, scheduled before the actual holiday. (Many firms also opt to send Thanksgiving cards instead of Christmas cards because they want their card to stand out from the rest.)

HOLIDAY FOOD IDEAS

Talk to several catering companies in your area to see what they can provide, or opt to cater it yourself if your team has the time and talent.

Marketing Event Guest List

FORM 21.05

Instructions: Huddle with staff 45 – 60 days prior to the marketing event to develop your guest list. To create your list, use your Top 20 Roster and reference Form 21.06. Remember that you will need to invite more people than you want in order to have sufficient number attend.

Guest Name	RSVP	Guest Name	RSVP
1		26	
2		27	
3		28	
4		29	
5		30	
6		31	
7		32	
8		33	
9		34	
10		35	
11		36	
12		37	
13		38	
14		39	
15		40	
16		41	
17		42	
18		43	
19		44	
20		45	
21		46	
22		47	
23		48	
24		49	
25		50	

COMMENTS:

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Marketing Event Budget Form

FORM 21.06

Instructions: Huddle with staff 45 – 60 days prior to discuss details and create a budget. Record the MAXIMUM amount you are willing to spend on each category listed below in order to make the special marketing event a success. Empower staff to work within the confines of the budget to accomplish the desired outcome. Agree upon the number of brief routine updates required to keep the attorney apprised of progress. Schedule/calendar follow-up dates.

Category	$ Budget $	$ Spent $	Difference +/-
Room/Space			
Tables/Chairs			
Rentals			
Entertainment			
Food			
Drinks			
Hired Help (Tips Included):			
Caterer			
Bartender			
Clean-up			
Photographer			
Decorations			
Eating/Drinking Utensils			
Parking Valet			
Invitations			
Name Tags			
Table Tents			
Flowers/Centerpieces			
Gifts			
Other:			
GRAND TOTAL			

COMMENTS:

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Common Referral Sources

FORM 21.07

Common Referral Sources for Most Practices

No matter what your practice areas are, you have probably received referrals from this generic list of referral sources just because they are within your sphere of influence.

Professional Groups

Local bar: committees, speaker's bureau, referral service, attorneys
Lead clubs
Alumni clubs
Service clubs
Associations related to your practice area
Legal referral agencies
Pre-paid legal groups

Internal References

Existing, satisfied A/B-level clients
Staff connections
Adjacent office contacts

Informal Networks

Family & Friends
Church groups
Local colleges & universities

Types of Referral Sources

The following list is a broad-brush overview of the types of influencers generally useful to attorneys. Your particular mix of referral sources will vary according to your practice areas. Look to see which categories of referral sources are appropriate for your practice in each of your practice areas. Check off the ones that apply to you.

ACLU
Addiction counselors
Adoption agencies
Bankers
Building associations
Business brokers
Claims adjuster
Consumer groups
Consumer protection agencies
Corporate HRD departments
Corporate meeting planners
CPA's, accountants
Detox units
Embassies
Entrepreneurs
Ethnic churches
Ethnic community leaders
Financial planners Franchise owner/president
Homeowner's associations
Hospital administrators HRS department Immigration agencies
In-house legal departments
Insurance companies
Juvenile agencies
Large-size company owner/president
Local event convention planners
Local politicians
Mental health counselors
Mid-size company owner/president
Minister, clergy
Minority-owned businesses
Mortgage brokers
Newspaper reporters
Nursing home administrators
Physicians
Real estate agents/brokers
Real estate developers
Senior citizen groups
Shelters
Small business networks
Social service agencies
Stockbrokers
Television advertisements
Therapists
Title companies
Venture capitalists
Workers' Compensation departments

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Invitation Tips

FORM 21.08

Formal or fun, you can't go wrong with written invitations. However, like telephone invitations, a mailed invitation needs to "set the tone" and spark an interest in your party! Follow the guidelines below as you organize your marketing event(s).

WHAT BASIC INFORMATION TO INCLUDE:

- ❑ Host's name(s)
- ❑ Type of event
- ❑ Date
- ❑ Time
- ❑ Location
- ❑ Reply telephone number

OPTIONAL:

- ❑ Rain Date
- ❑ Special parking arrangements
- ❑ Map
- ❑ Tell something extra, like what to wear

WHEN TO MAIL THE INVITATION:

Formal dinner…………………………	4 weeks ahead
Informal dinner……………………….	2-3 weeks ahead
Luncheon or tea ……………………..	2-3 weeks ahead
Cocktail party ………………………..	3 weeks ahead
Big bash ………………………………	4 weeks ahead

APPROPRIATE TYPES OF INVITATIONS:

Specially printed …………………….	Any type of party, semi-formal to casual
Fill-in invitations from card shop…...	Perfect for holiday get-togethers, open house, picnics
Handwritten on blank cards………...	Small personal parties, formal or informal
Email ………………………………….	Casual get-together/"happy hour" with business friends

TIPS!

- ➢ Clearly state who is invited.
- ➢ Create an invitation that is as "unique as the party is"!
- ➢ Use clever words to spice up the invitation. Write something wild and wacky, or simply say something sincere and heartfelt. Either way, *GET THEIR ATTENTION!*
- ➢ If you're not sure of postage, use the post office or put extra stamps on the invitation.
- ➢ Avoid using the term, "Regrets Only". It technically means, "call if you can't come", but you can't depend on people to call – they often forget. If you invited 25 people and no one called, you may end up with 2 guests or 20. Don't take the chance.
- ➢ Include more than one RSVP number, such as work, home, cell, fax, email, etc.
- ➢ Call those who have not responded 2 – 5 days prior to the event.
- ➢ A printed or hand-written reminder card that arrives one week before the event (without an RSVP) is also a good idea.

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Marketing Events Resources

FORM 21.09

Below you'll find a list of vendors that can assist you in planning a Marketing Event. Click on the provided links for a more comprehensive overview of their services.

AWARDS/TROPHYS/GIFTS/CLOTHING/CARDS:

Successories
www.successories.com
800-932-9673

HRdirect
800-346-1231
www.hrdirect.com
(awards, cards)

Best Impressions Promotional Products
800-635-2378
www.bestimpressions.com
(imprinted golf balls)

Lands End Corporate Sales
www.landsend.com
(The art of imprinted business casual)

awards.com
800-5AWARDS

Baudville
www.baudville.com
800-728-0888
Recognition/Team Building/Special Events

Amsterdam Printing & Litho
800-833-6231

Website Design Tips

FORM 22.00

To Begin The Process:

- Select a domain name that will contain the words most likely used in a search by your clients. Unless your firm name is already well known and heavily branded, opt for names that have a geographical tie-in such as: *Houstonconstructionlawyer* or *kentuckydivorceattorney*.

- Decide upon your target audience. For most attorneys the audience will be prospective clients.

Page Layout and Design:

1. Find an experienced website developer who can show examples of previous work. Those who have created websites for law offices would be preferable. Ask them to generate 3 initial designs for you to choose from.

2. Make the site graphically appealing to your target audience – especially your home page which will set the tone for the entire site.

3. Survey your competitor's sites to see what they've done right and done wrong. Gather samples of sites that exemplify the look and feel you'd like. Give these to your designer. Find out if he or she will be using a template service such as joomla.com to build upon for their design. Ask about the constraints of the template upfront, as they may dictate portions of your design.

4. Use a site header that matches your logo or incorporates it into the site's design.

5. Aim for a layout that features a balance of text, graphics and white space on each page.

6. Make it very easy for prospective clients to find your phone number and contact information. Along with appearing on the contact page, your phone number should be on the home page in the upper right hand corner for maximum visibility.

7. Make sure the header/navigation area is consistent throughout your site and takes up no more than one-quarter to one-third of the top portion of the browser window at 1024x768 resolution.

8. The footer area of each page should contain the copyright, last update and contact e-mail address.

9. Make sure the site displays without horizontal scrolling at 1024x768 and higher resolutions.

10. To insure readability, maintain a high contrast between the text and background. The site's palette of colors (no more than 3 or 4 plus neutrals) should be consistent throughout.

11. Your home page must contain compelling, interesting information "above the fold" (the area you see before scrolling down) at 1024x768.

12. Make sure your home page downloads within 8 seconds. Your graphics should be optimized and not allowed to significantly slow the site's download

Multimedia Presentations:

1. The use of videos should serve a clear purpose and provide a warm, flattering portrait of one or more

partners. Placement on the homepage, above the fold, is optimal.

2. Display the download times for audio or video files.

3. If needed, provide handy links to downloads of media plug-ins to enable the maximum amount of viewers to view the media.

Content Presentation:

1. Use high quality photographs to convey the emotional content of your message and to visually guide the viewer to crucial information. Refer to istockphoto.com, fotalia.com, or gettyimages.com for high quality stock photography.

2. Make use of easy-to-read, common fonts such as Arial or Times New Roman and use them consistently throughout the site.

3. Your written content should be thoroughly proofed and error-free. It should include consistent headings and bullet point treatment throughout.

4. Because reading on a computer screen is difficult, your text should be written in short sentences in brief paragraphs and be surrounded by the right amount of white space. Simplify your language and write using everyday terminology. Avoid legalese.

5. Any written content should provide meaningful, useful information for your intended audience – prospective clients. Make sure the content is updated regularly.

6. Be sure to minimize the number of clicks needed to find back pages and locate specific information.

7. Embed links in your written content that connect viewers to other useful. pages within your site. Limit the links that take viewers away from your site.

8. Ensure that all internal and external hyperlinks work properly.

9. Before launching your site, test all forms to ensure they function as expected. Also, make sure your site appears in a consistent way on varying screen sizes.

Launching the Site:

1. Send an e-mail and/or tweet announcing the launch of your new site with a link to the site.

Before Launching Your Site:

1. Add your website address to your letterhead, business cards and any other marketing material.

2. Change your e-mail address to one with your domain name.

3. Link your Facebook profile, Twitter account, LinkedIn profile, Avvo profile, etc. back to your website.

4. Send a link to a small group of people (whom you trust) prior to your launch. Ask them to proof the site and give you their feedback.

Social Media Marketing

FORM 22.01

Social Media Marketing is an exciting new channel through which to promote your firm, build your brand and maintain your relationships. While it will never replace face-to-face contact for sheer marketing impact it can effectively extend your in-person marketing efforts by providing extra of top-of-mind awareness and opportunities to expand your network. Social media networking should never be the sole focus of a marketing plan, but one aspect of a well-rounded marketing approach that includes a heavy emphasis on personal contact.

Find the Right Host

Start with whatever site you feel is the most popular in your community and with your clients and referral sources. Conduct a search to see where your competitors have set up camp. Ask your clients, other attorneys and referral sources to see and understand their on-line behaviors and preferences.

Guiding Principles to Use When Assembling Your Profile:

1. <u>Photographs and Graphics:</u> when profiling your law firm, you may use your firm logo, an exterior photo of the firm building, a picture of the partners or the entire team as your main profile photo.

    a. Additionally, you may post photos of the events your firm sponsors, such as charitable or sports-related activities. Avoid posting any photos that are overly personal or that could embarrass any member of the team.

2. <u>Organizations Listed</u>: It is okay to post information about the hobbies, passions and interests of key firm members as long as this does not become the focus of the site. A small amount (10% of the overall content) of personal information is fun and provides the humanizing element that's often missing in more formal marketing efforts.

3. <u>Event Notifications</u>: you may post news and information related to upcoming events. Keep in mind there is a fine line between TOMA and intrusiveness and don't overdo it.

4. <u>Acquiring Followers</u>: the sole purpose of having a presence on a social networking site is to draw attention to the firm, so having a great many followers is desirable. Followers can come in the form of referral sources, professional and community contacts -- and clients. Given the public nature of the relationship (often a name and picture are displayed for each follower) each firm must ask itself if it's appropriate to request its clients to become friends, fans or followers of its site.

5. <u>Linking Strategies</u>: every firm with a website should automatically link it in several locations throughout their profile. If the firm posts a blog, a "teaser" should be posted on the firm's "wall" with a link back to the blog. If the firm provides new and useful content on their website, they should preview it on their profile with a link back to their website. If someone in the firm is tweeting, links to tweets should be posted and vice versa.

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6. Testimonials/Voting/Ranking Functions: This function often crosses lines established by the rules of professional conduct which traditionally prohibit testimonials. An updated ruling, when it occurs, may change what is allowed.

7. Maintenance: it's important to select one person in the firm to regularly tend to the site. He or she can post updates on firm activities, respond to queries and upload new photographs.

8. Written Posts: in order to present an accessible, but professional image, you should post your mission statement and the biographies of the partners, associates and select team members. Also post your practice areas and any area of special expertise.

    a. Blogger and attorney Nicole Black recommends using the **50-30-10-10** rule, when operating in an online forum:

        i. 50 percent of your posts should provide followers with links to articles, blog posts and other online content you think might be of interest; this includes "re-tweets," or "sharing" of relevant content. If you want to be seen as an expert in a particular field, this is the opportunity to aggregate information on a specific subject matter and share it with others – but do so in a way that is helpful and informative;

        ii. 30 percent of your posts and comments should consist of replies to other users' posts, links, status updates or tweets —in other words, engage in conversations with others at least 30 percent of the time. Don't make it a habit to focus only on yourself and your needs;

        iii. 10 percent of your posts can consist of self-promotion, including your firm's blog posts and information about professional activities and accomplishments;

        iv. The final 10 percent of your online communication can be comprised of posts or tweets that are devoted to your personal interests and hobbies.

Click the icon to view our sample firm Facebook page.

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EXTRA FORMS

The following forms are duplicates of our most popular forms, provided for your convenience.

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DATE OF INQUIRY CALL	NAME OF POTENTIAL CLIENT	SOURCE				POTENTIAL CLIENT *QUALIFIED?*	*QUALIFIED* POTENTIAL CLIENT BOOK CONSULT?	POTENTIAL CLIENT CONVERT TO CLIENT?
		YELL. PAGES	WEB	AD	REFERRAL SOURCE NAME			
	Total Inquiries	Total Y/P	Total Web	Total Ad	Total Referral Source	Total Qualified	Total Booked	Total Converted

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Potential Client Scorecard

FORM 18.06A

Name: **Date:** ___/___/___

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SOURCE:

- ☐ **Found out about attorney/firm in the phone book**
- ☐ **Referred by a local bar referral service**
- ☐ **Referred by C/D-level client(s)**

MATTER TYPE:

- ☐ **Work is out of attorneys area of expertise, or one attorney dislikes**

FINANCIAL:

- ☐ **First question was, "How much is this going to cost me?"**
- ☐ **Mentioned that they know another lawyer who is cheaper**
- ☐ **Resisted paying a consultation fee or a retainer, or only willing to pay half of the fee/retainer**
- ☐ **Holding out on the promise of future work in order to get discounted fee**
- ☐ **Is a distant family member expecting a "deal"!**

COOPERATION:

- ☐ **Mentioned that they are switching (or have switched) attorneys mid-stream**
- ☐ **Showed up with an urgent life & death matter demanding the attorneys full immediate attention**
- ☐ **Deaf to an objective realistic appraisal of his/her case**
- ☐ **Requested that the attorney guarantee a particular outcome**
- ☐ **Doesn't want to take responsibility for his/her own actions**
- ☐ **Reluctant to schedule an appointment, or repeatedly missed meetings/changed appointments once a time was set**
- ☐ **Neglects to bring requested documents**
- ☐ **Seems evasive (not forthcoming, untruthful)**
- ☐ **Knows more about the law than attorney does…. wants to direct/control the case**
- ☐ **Downplays the seriousness of the problem or complexity of the matter.**

ATTITUDE:

- ☐ **Displays a level of anger that is disproportionate to the matter at hand**
- ☐ **Appears to be "seeking revenge" or hiding an agenda**
- ☐ **Has a bad attitude toward lawyers in general**
- ☐ **Difficult to please, no matter how well you take care of him/her**

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- ☐ **Mentioned that they know another lawyer who is cheaper**
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COOPERATION:

- ☐ **Mentioned that they are switching (or have switched) attorneys mid-stream**
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- ☐ **Deaf to an objective realistic appraisal of his/her case**
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ATTITUDE:

- ☐ **Displays a level of anger that is disproportionate to the matter at hand**
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- ☐ **Appears to be "seeking revenge" or hiding an agenda**
- ☐ **Has a bad attitude toward lawyers in general**
- ☐ **Difficult to please, no matter how well you take care of him/her**

☐ **TOTAL # WARNING SIGNS**

Potential Client Scorecard

FORM 18.06A

Name: **Date: ___/___/___**

Instructions: Use this form to weed out C/D-level clients by using the scorecard below to check off “Warning Signs”. IF MORE THAN THREE (3) BLOCKS ARE SELECTED, you are probably dealing with a high maintenance person who will require 80% of your time -- with only a 20% return in revenue. If this happens, you may want to bow out gracefully.

Staff members who screen calls and/or set appointments for the attorney should rate the potential client initially. If an appointment is scheduled, the form should then be passed off to the attorney who can document any other red flags that appear during the first meeting.

SOURCE:

- ☐ **Found out about attorney/firm in the phone book**
- ☐ **Referred by a local bar referral service**
- ☐ **Referred by C/D-level client(s)**

MATTER TYPE:

- ☐ **Work is out of attorneys area of expertise, or one attorney dislikes**

FINANCIAL:

- ☐ **First question was, “How much is this going to cost me?”**
- ☐ **Mentioned that they know another lawyer who is cheaper**
- ☐ **Resisted paying a consultation fee or a retainer, or only willing to pay half of the fee/retainer**
- ☐ **Holding out on the promise of future work in order to get discounted fee**
- ☐ **Is a distant family member expecting a “deal”!**

COOPERATION:

- ☐ **Mentioned that they are switching (or have switched) attorneys mid-stream**
- ☐ **Showed up with an urgent life & death matter demanding the attorneys full immediate attention**
- ☐ **Deaf to an objective realistic appraisal of his/her case**
- ☐ **Requested that the attorney guarantee a particular outcome**
- ☐ **Doesn’t want to take responsibility for his/her own actions**
- ☐ **Reluctant to schedule an appointment, or repeatedly missed meetings/changed appointments once a time was set**
- ☐ **Neglects to bring requested documents**
- ☐ **Seems evasive (not forthcoming, untruthful)**
- ☐ **Knows more about the law than attorney does…. wants to direct/control the case**
- ☐ **Downplays the seriousness of the problem or complexity of the matter.**

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FORM 18.04

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Monthly Marketing Activities

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