EMPOWER YOUR TEAM, SKYROCKET YOUR PROFITS: MASTER LEGAL CLIENT INTAKE

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Patti Paz
March 7, 2024

PATTI PAZ

Patti Paz is a Certified Team Leader and Atticus Adjunct Practice Advisor. Patti was instrumental in the creation of Idaho Estate Planning, an estate planning and elder law firm in Idaho. She also had the privilege of presenting a Game Changer at the 2017 Summit on her journey with handling initial consults.

She began her association with Atticus over a decade ago coaching with Atticus Practice Advisor and Attorney Steve Riley. She has participated in the Practice Growth Program as well as Dominate your Market Program. She was hand-picked in 2021 to develop curriculum and facilitate the Atticus Team Leader Certification Program.

Patti has been married for 33 years, has two daughters, two sons-in-laws, a granddaughter and an old English bulldog, Baloo.

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ABOUT US

We help lawyers grow great practices and cultivate great lives

HELP US GROW: CONNECT AND SHARE

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MORE THAN JUST BEING GREAT AT THE LAW

LEGAL SKILLS + BUSINESS SKILLS = PROFITABLE PRACTICE

THE GROWTH CORNERSTONES™

REVENUE, INCOME, CONTROL, FREEDOM AND IMPACT

Sharpening Focus	Attracting High Value Clients	Building a Great Team	Cash Flow and Profitability

LEGAL SKILLS

AGENDA

- Three Common Objections
- Foundation Analysis
- Value Bridge
- Prospect to Happy Client Experience
- Top 10 Mistakes

SOME BASIC THOUGHTS

- This is a “basics” workshop
  - We are only able to talk about three of the six steps today
    - The additional steps are how to empower the team member you have chosen to handle IC’s
  - You can take the process and implement it yourself
  - We can help you accelerate the process
- Process drives profitability
- Patience-This is an incredible game-changing process for a law firm, and it will require you to look at your entire process from your prospect intake to after the initial meeting

3 Common Objections of using empowering your team to handle Legal Intake/Initial Consults

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THE 3 COMMON OBJECTIONS

Is it unethical? Yes, if we adopt your current model, meaning how you do it now

It will mess with my cash flow

You don't understand, no one can do it better than me!

LET’S GET STARTED ON A NEW WAY OF THINKING

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Step One – Foundation Analysis

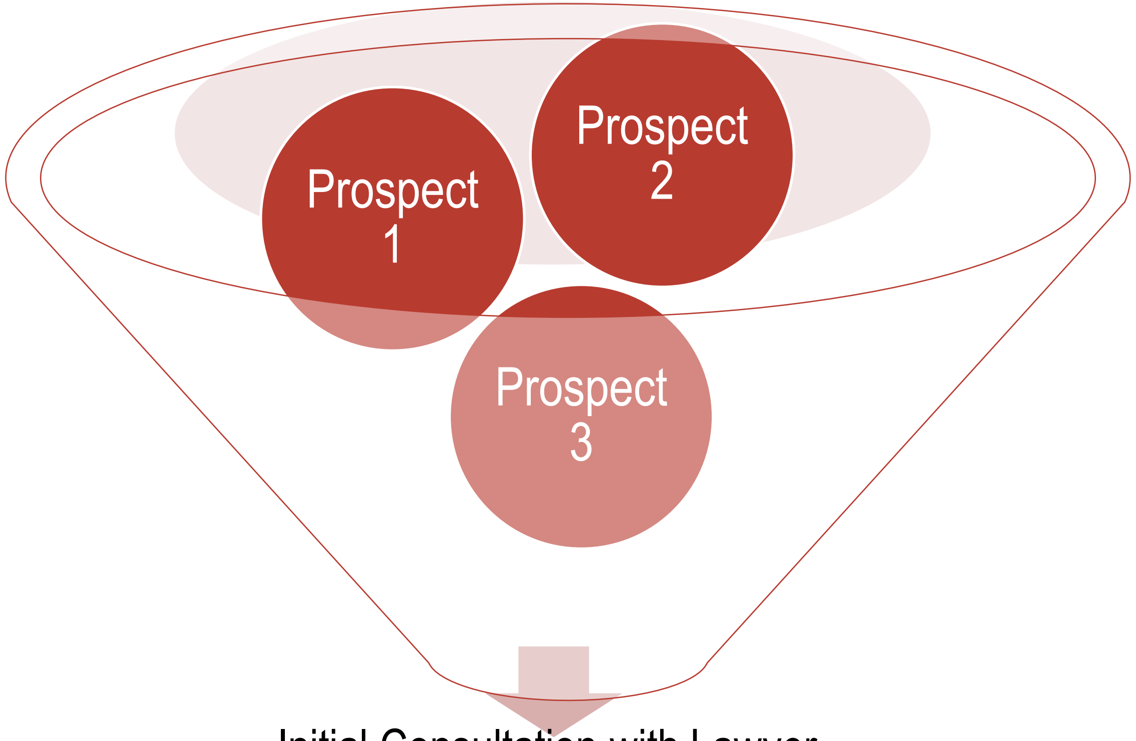
THE FOUNDATION ANALYSIS™

- Scorecard current results
- Process out your prospect pipeline
- Process out your initial consult
- The capture of your "Story Glossary"

SCORECARD CURRENT RESULTS

- How many prospects are calling?
- How many are scheduling?
- How many are converting?
- How long is it taking to convert?

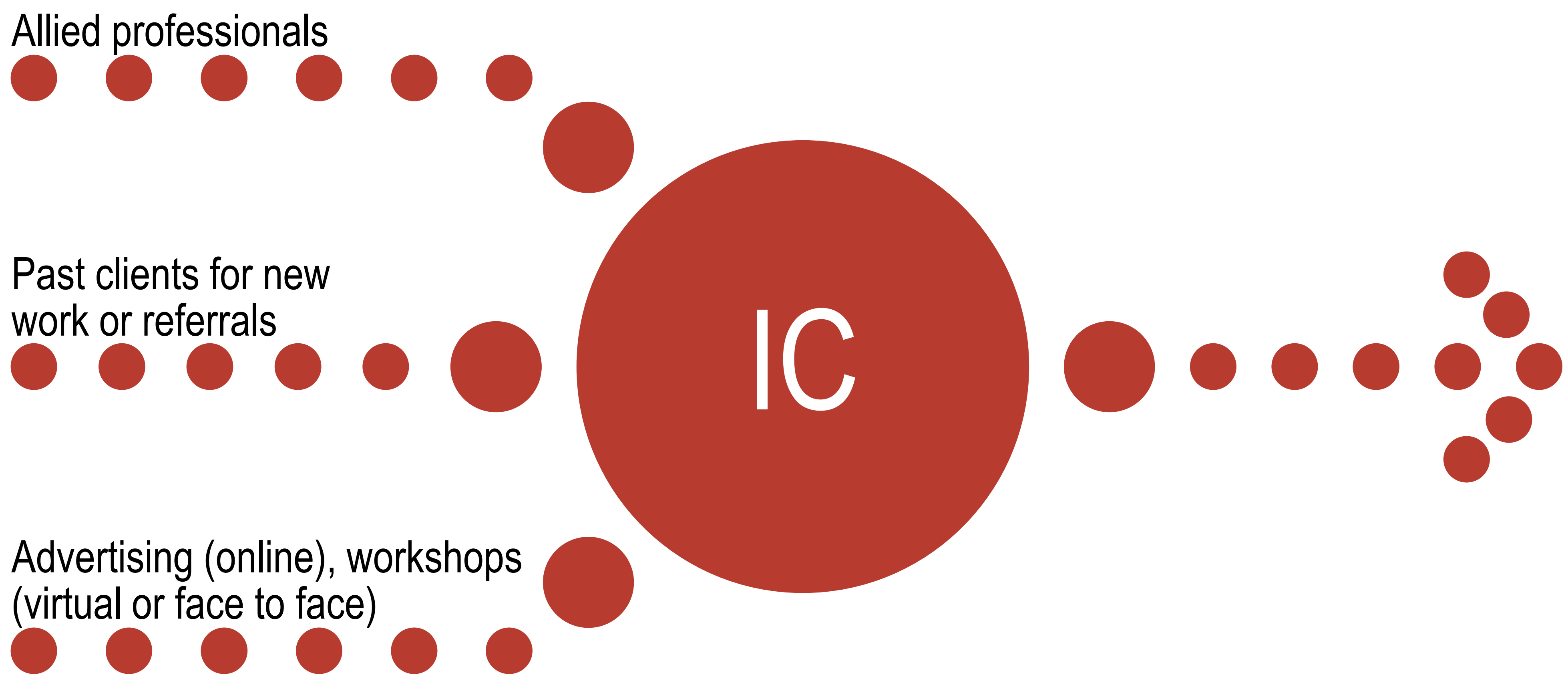
TYPICAL INTAKE PROCESS-JUST FOCUSED ON SCHEDULING. THE “BIG NET” APPROACH



Initial Consultation with Lawyer-

Lawyer sorts them out. Education, pricing, strategy-all happens in this meeting.

NEXT STAGE-FOCUS ON PREQUALIFICATION AND EDUCATION. “AIR TRAFFIC” CONTROL



Name
Steve

Date
August 2020

Your Virtual Prospect Pipeline

Legend

Action

Beginning/End

Decision

Next Step

Score 1-10

Value vs Cost __

Education __

Trust __

Cultivate Your Audience	Cultivate Your Leads	Cultivate Your Prospects
• Total Addressable Market (TAM) • Looking for Information, Content, Education to learn about solutions to their issues	• To Be a Lead they must give me email & permission to mkt to them • One-way communication	• To be a Prospect, they need to be in dialogue to buy something like an initial consult

IC

TOP 3 INSIGHTS		

TOP 3 ACTIONS		

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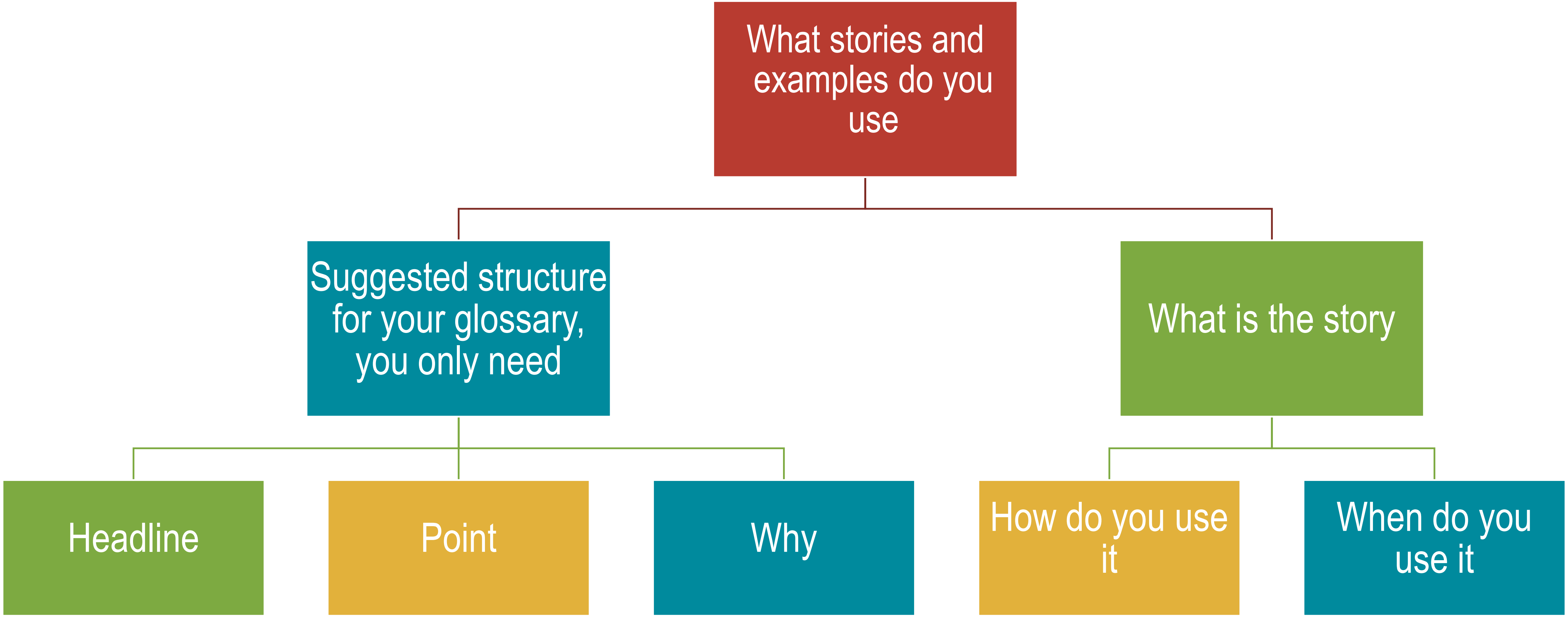
THE “STORY CAPTURE” & STORY GLOSSARY



Step Two – Value Bridge

THE VALUE BRIDGE™

- Price list - how you charge and how your firm gets paid
  - (contingency or hourly)
- You need some written way of explaining
  - What your firm is offering to do
  - What is the price point
  - And what do they get for that
- Your visual process-how you help the client

The Choice Context Template™

Name: ______ Date: ______ Target Prospect ______

Offer: ______	Offer: ______	Offer: ______
How it helps you (The Client):	**How it helps you (The Client):**	**How it helps you (The Client):**
• ______ • ______ • ______ • ______ • ______	• ______ • ______ • ______ • ______ • ______	• ______ • ______ • ______ • ______ • ______
What it includes:	**What it includes:**	**What it includes:**
• ______ • ______ • ______ • ______ • ______	• ______ • ______ • ______ • ______ • ______	• ______ • ______ • ______ • ______ • ______
$ ______	$ ______	$ ______

Your Process Flowchart™

Name: ______________________ Date: __________

Project: ______________________

START ACTION DECISION FLOW

Step Three – Prospect to Happy Client Experience

THE PROSPECT TO HAPPY CLIENT EXPERIENCE™

- Back and front stage process
  - Front – your process for solving the problem (public facing)
    - (5 to 7 steps)
    - Shared with Prospects, clients and referral sources
  - Back – workflow on how your team solves the problem
    - Systems and process that your firm does (team facing)
  - The 5 P's

THE "FIVE P" SUGGESTED FRAMEWORK

- Present
- Permission
- Problem
- Process
- Price

POSITIVE CHANGES WHEN DONE CORRECTLY

- Empowered Team
  - Take ownership in process, including marketing and triage
  - Take responsibility for engagement and triage
- Processes
  - Cleaned up and re-tooled
  - Team collaboration
- Free up 100’s of hours of attorney time to
  - Do more marketing
  - Work on the business

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Top 10 Mistakes

THE TOP 10 MISTAKES

1. Throwing together an agenda and throwing someone in the room
2. Taking a stressed out and overworked, but trusted paralegal and saying, “Hey, I got this idea, now you can do my job too”
3. Making them do it the "way you have always done it" that has led to such a high closing rate but long meetings and low-price points
4. Not being patient. To do this well, you will have to adjust about 10 steps in your process
5. Not selecting the right person and making sure they are successful by getting their buy-in, reducing their workload, and letting them practice
6. Not following the 5 P’s
7. Sitting in the initials with your new person to make sure "they do it right“

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THE TOP 10 MISTAKES (CONTINUED)

8. Failing to let your person practice and mock initials with you (or someone else)
9. Not bonusing them for being successful; this is stressful, and not something they signed up for. If you don't structure an incentive, they will not be motivated
10. Forgetting to measure the before and the after, otherwise, you will think it worked perfectly before.
    - Average revenue per case
    - Close rate
    - Time per appointment for team
    - New time found for you: marketing, high dollar work, not list serves

FINAL THOUGHTS AND QUESTIONS?

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WHAT TO DO NEXT:

- Check the chat box
- **Schedule your free consultation**
- Discuss your current intake process
- Discuss your new way of thinking
- Discuss your foundation

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UPCOMING WORKSHOPS AND PROGRAMS

THE PRACTICE GROWTH PROGRAM®

San Francisco
Orlando

GROW YOUR LAW PRACTICE WITH AI

March 21, 2024, ZOOM

ATTICUS RAINMAKERS

Monthly Group Webinar

TEAM LEADER CERTIFICATION PROGRAM
APRIL START

LEVEL 1

BUILDING THEIR SKILLS

- Self-Confidence & Trust
- Delegation
- DISC Self Awareness
- Basic Profitability & Cashflow Understanding
- KPI Development
- *Crucial Conversations*

LEVEL 2

DEVELOPING THE TEAM

- Influence Mindsets
- Building Processes
- Employee Handbook
- Long Term Absence Plan
- Lean work through

  A Factory of One

LEVEL 3

CRUCIAL CONVERSATIONS

- Critical Thinking Skills

  Quiet Leadership
- Teaching & Facilitating
- Development of KPI's to Leverage the Team

RESOURCES

- *Predictably Irrational* by Dan Ariely
- Great Practice Great Life Podcast Episode 010 – Is it Possible for non-Lawyers to Do Initial Meetings with Patti Paz https://atticusadvantage.com/episode010
- Great Practice Great Life Podcast Episode 020 – Implementing the Non-Lawyer Initial Meeting with Elizabeth Clark https://atticusadvantage.com/episode020

Thank You!

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