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# TOP 5 MOMENTS OF THE TRI-ANNUAL RETREAT

Roslyn Drotar – Lawyers With Purpose, Marketing & Social Strategist

Sitting in the airport restaurant next to the gate for my flight home, I was physically exhausted after two weeks of travel, but mentally I was pumped! While I was excited to go home to my family, my mind was spinning as I was forced to sit still for some time while waiting for boarding to begin.

Grabbing a notebook from my bag, I began reflecting and "dumping down" all my takeaways. I wanted to be sure to capture all the things I knew I needed to work on to "knock it out of the ball park" for the final two months of 2014.

Below are my top five takeaways after spending a week of legal technical support training, marketing, coaching and team training with our members. The members and their teams always inspire me so much with their focus and commitment to put their heads down and work hard with their teams to reach the goals they declare on their Money Plans.

- **Two and a half days on Medicaid planning, asset protection, Veteran's benefits, marketing your practice and every question asked along the way in Practice With Purpose.** Every moment was about the best approach to serving clients in the most effective way, while members added to their growth and understanding of estate & elder law planning. Case studies were analyzed that probably mirror those sitting on attorney desks awaiting each attorney's return.
- **The arrival of the members and their teams on Wednesday.** Attorneys and their teams started to trickle into the hotel and everyone hugged each other. There were a few handshakes but most

were hugs. The LWP membership is a national group of attorneys and team members who hug when we see each other. We know each other and grow together. This warms my heart.

- **The breakout sessions.** An entire track each day was dedicated to either (1) technical legal; (2) marketing; or, (3) team development. Just look at the titles of the sessions:
  - Key Features to the Trust Drafting Software You Need to Know
  - Busting Financial Planner Myths
  - You've Defined Roles, Now What?
  - Business Succession Planning
  - Community Presentations & Relations
  - What's Happening in the Conference Room – The Signing & Funding Meetings
  - Post Death Trust Administration
  - How to Generate Facility Revenue: Getting & Staying in the Door with Nursing Homes
  - Communication Skills
- **Firm Retreats.** We kicked off the firm retreats with each firm sharing a win since the last retreat in Chicago. The shares were all HUGE in my personal opinion. A common theme was that they all had more than one thing to share – but since we were limited to one – it was hard to decide which one to share with their mic in hand. So much building and growing toward the practice of their dreams had happened.
- **The Why Coaching Day.** Breakthroughs from The Why Coaching Day were kicked off by Dave with a high level overview of every single conversation we've had in the Why program since Day 1, January 29, 2013, 21 months ago. Going through the activity of "Where were you ten years ago?" to putting down "How you can be now to assure a future and present you love!" My favorite share came from a team member who said that she's doubted herself as a "leader" in the firm but now has 100% confidence that she IS and WILL be a leader in the firm – all said with tears in her eyes (and mine too).

It felt as though the focus in the room was completely on point. After being on implementation calls this past week with so many of our members, I know one thing for certain... there is a level of focus and determination among our members I've not seen before. Drive, determination and commitment to "hitting it out of the ball park" for the future was defined for members both personally and professionally.

I can't wait for the February 2015 shares in Charlotte.

## ACTIONSTEP TRAINING SCHEDULE

Webinar #4: December 3, 2014

Reporting – Learn how to enter data correctly in order to generate reports to help track business

Webinar #5: December 10, 2014

Open Forum – Question and Answer Session about what has been covered in the first 4 weeks

Webinar #6: December 17, 2014

RMS – Learn how manage your professional workflows to generate RMS reports

Webinar #7: TBA due to Holiday Schedules

Maintenance – Learn about Maintenance Matter workflows and how to manage clients once they opted into the program.

## FOR MORE GREAT TIPS & ADVICE, READ OUR BLOG

HTTP://BLOG.LAWYERSWITHPURPOSE.COM

## MEMBER OF THE MONTH

Bruce Adams & Bill Miller

**What is the greatest success you've had since joining LWP?**
Doing the workshops has been very helpful to us. The workshops are easy to fill and have been well received.

**What is your favorite LWP tool?**
The greatest tool is that the tools work together - the Vision Clarifier and Med Qual Worksheet are wonderful tools!

**How has being part of LWP impacted your team and your practice?**
Joining LWP has created positive energy and a renewed enthusiasm for the practice of law here at our office.

## NOTABLE EVENTS

### Weekly

Live ListServ
Every Monday-4:00 PM EDT

### Bi-Weekly

Marketing Roundtable
2nd and 4th Fridays
12:00 Noon EDT

### Monthly

Veterans Marketing Moments
3rd Wednesday-3:00 PM EDT
Veterans Back to Basic Training
3rd Thursday-3:00 PM EDT
Veterans Roll Call
3rd Thursday-4:00 PM EDT

### Live Programs

Practice With Purpose
February 3-5 Charlotte NC
Tri-Annual Retreat
February 4-6 Charlotte NC

To register for an event, visit our events page
LawyersWithPurpose.com/Events-for-Lawyers.php

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## ANNOUNCING NEW PRICING, SERVICES & MEMBERSHIP CHANGES

At LWP we are committed to innovation and continuous improvement. In an effort to augment our services and the value of our membership levels, LWP is changing it's membership levels. All membership offerings were specifically designed to serve solo, small and medium sized firms based on their customized needs. Changes are applicable to all NEW memberships.

If you have been considering joining the Lawyers with Purpose community, please contact mhall@lawyerswithpurpose.com to schedule a 15 minute demo.

**Existing LWP member? Great NEWS, you're grandfathered in!**