# Dialing for Appointments

*by Molly L. Hall, Director of National Enrollment*

In the business world there is constant discussion of ROI – return on investment – in connection with every matter imaginable. If entrepreneurs could track the number of breaths each employee takes in an hour to equate the productivity and focus upsurge per employees' hourly rate, there would be an ROI tracker installed in their lungs.

Some things are straightforward and simple, others not so much.

Recently, I was visiting one of my favorite clients, and as we drove into his satellite office parking lot, he explained that they just hired a full-time body for that office. "Why?" I asked. "There are only clients in that office a few days a month. Why invest in a full-time employee?" "Simple," he rebutted with a grin on his face: "To dial for appointments."

Kelly is a $15/hr employee whose sole focus is to call on past clients, starting with the first year the firm was in business. It is BRILLIANT. Talk about ROI!

How does she go about it?

**1.** She started with clients who hadn't been in for a very long time, before they even had an annual review program. She was trying to get them in for a complimentary review appointment.

**2.** Then she moved on to clients who had been in, but who never hired them for one reason or another, to see if they were interested in a complimentary diagnostic appointment.

She had been on their payroll for 10 weeks when I met her last month. She had just scheduled her 155th appointment. The part that blew me away was that she was working off spreadsheets, not even a CRM database – they hadn't migrated their old data into a database yet. Talk about an old school way of getting business.

So, the ROI? $15/hr x 40 hrs/week x 4 weeks = $2,400 a month (roughly). Their average fee is $5,000. Possible good investment?

I know, "That may work for him but we ...." I get it: You may be a solopreneur who:

- Is struggling to get clients (money) in the door to begin with;
- Hasn't connected with the clients who have come in over the years but never hired you, and you're not willing to invest in "tire kickers" and waste your time ... again;
- Can't keep up with the current work on your desk.

Irrespective of the status of your business, an investment in an appointment setter is a phenomenal return on investment, regardless of which of the above scenarios you might be in. Sometimes you have to take the time to power down and look at the WHOLE picture vs. pigeonholing yourself into why time, money, space, calendar or files won't allow for investing in people to help you grow your business.

It no longer works to fall back into that safety net of "won't work for me." Not when you're a member of LWP and have unlimited access and support to best practice approaches with all things tried, tested and proven methodologies.

# Member of the Month

*Churchhill Law Office — Helena, MT*

## WHAT IS THE GREATEST SUCCESS YOU'VE HAD SINCE JOINING LWP?

Maintaining a successful firm even after crisis occurred when our Attorney was in a car accident. A large portion of our success is the ActionStep platform and having the technical knowledge within the office to program and automate everything and staying in the black!

## WHAT IS YOUR FAVORITE LWP TOOL?

This is a cop-out, but they are all amazing in that they have assisted us to maintain even in crisis. The way the stories tie to the Estate Plan Audit, and then the Vision Clarifier have been a massive support in reminding clients of their goals in follow-ups.

## HOW HAS BEING PART OF LWP IMPACTED YOUR TEAM AND YOUR PRACTICE?

Being able to call for help. The greatest example is one, Nedra's constant ideas, two, Candace's drive to move forward, and most of all, three, without Molly "encouraging", e.g. "do it", us to do Vision's without the Attorney, we would have had to close the office after Debbie's accident.

## SHARE SOMETHING ABOUT YOURSELF THAT MOST PEOPLE DON'T KNOW ABOUT YOU.

**Beth** is a very experienced database and lean management trainer, and is a bit of a recluse. **Melissa** worked for 14 years in daycare and this is her first office job and has surpassed any assistant we've ever had in the office. She is a HUGE prankster. **John** has extensive experience in programming and automates everything in ActionStep beyond its basic programming. He has played the piano for 30 years. **Debbie** is a successful attorney with a secret passion for beading! She makes most of her own jewelry. **Terry** is retired, and was a helicopter instructor with the Guard before joining our team. He makes a mean chocolate chip cookie for the clients.

## WHAT IS YOUR FAVORITE BOOK AND HOW DID IT IMPACT YOUR LIFE?

**John** – Technical programming books. It has advanced his piano recording and office efficiency. **Melissa** – *To Kill a Mocking-bird* – It makes her sound more sophisticated when asked what her favorite book is. **Beth** – *Machine that Changed the World* – Has simplified her life both at home and work through lean management. **Debbie** – *The Biology of Belief* – Helps her to grow spiritually. **Terry** – *Killer Angels* – Loves history and it a great portray of struggle, honor, and patriotism.

## NEW MEMBERS THAT HAVE JOINED IN DECEMBER

- **W. Steve Smith** — Houston, TX
- **Cassandra Leo** — Royal Oak, MI
- **Jackie Collins** — Hilliard, OH
- **Ken Gonzalez** — Staten Island, NY
- **Jason Kornfeld** — Brooklyn, NY
- **Jason Penrod** — Lake Wales, FL

## EVENTS NOT TO BE MISSED

January 4th (4pm EST) — ***Effective Drafting Using the Family/Marital Trust***

January 6th (12pm EST) — ***VA Benefits and Community Medicaid***

January 14th (4pm EST) — ***Direct Mail Marketing***


# the tri-annual practice enhancement retreat

**FEBRUARY 24-26 — ORLANDO, FL**

*The Place to Help Turn Your Practice Dreams Into Reality*

*The only event for estate law, asset protection, and elder law professionals AND the teams that support them.*

***Our unique fast-track training programs, focus sessions and practice-specific workshops allow you to zero in on the immediate needs of YOUR practice.***

You'll never have to worry about sleepy CLE courses or waste-of-your-time sessions. We allow you to customize your agenda so that you can laser-focus in on the training that matters to you most.

The Tri-Annual Practice Enhancement retreat hosts some of the finest legal minds and thought leaders in the estate and elder law industries that share a mission of sending you home with ***real strategies and tools that you can implement right away…***

… minus all the "Ivy Tower" theories, fluff or unrealistic practice strategies that cost a fortune and an entire staff army to put in place. **The explosive growth strategies we teach you can be accomplished at any skill level, at any practice size and on ANY budget.**

This event is for YOU.

***The Tri-Annual Practice Enhancement Retreat is For Your ENTIRE Team, Too!***

## WHAT WILL I LEARN AT THE EVENT?

*Our in-depth training offered at the Tri-Annual Practice Enhancement Retreat covers a wide range of topics, with a clear focus on helping you:*

- Freshen up on your legal/technical knowledge and **discover new lucrative offerings to weave into your current business model;**
- Stay up-to-date on changing laws and best practices that affect your business;
- Discover the exact clients to target (and which to avoid!) that will help you sustain a lucrative estate planning and elder law practice;
- How to generate even MORE estate planning and elder law matters on your current budget and using your current database (…we'll show you our top techniques to mine the lucrative diamonds right under your nose!)
- Learn how to host consumer-focused presentations, effortlessly fill the room and **master the art of "speaking to sell;"**
- **…and more!!**

***register here:*** *retreat.lawyerswithpurpose.com*

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