Dialing for Appointments

by Molly L. Hall, Co-Founder, Lawyers With Purpose

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

Churchill 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 Mockingbird* – 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 SINCE DECEMBER

- **W. Steve Smith** — Houston, TX
- **Rachel Hawrylo** — Royal Oak, MI
- **Jackie Collins** — Hilliard, OH
- **Ken Gonzalez** — Staten Island, NY
- **Jason Kornfeld** — Brooklyn, NY
- **Jason Penrod** — Lake Wales, FL
- **Aimee Griffin** — Washington, DC
- **W. Andrew Moore** — Auburn, CA
- **Rodney Scott** — Mursfreeboro, TN
- **Joseph Cordell** — St. Louis, MO

EVENTS NOT TO BE MISSED

February 18th (4pm EST) — **Financial Freedom: How the Vision & Signing Meetings No Longer Have to Be Dependent on the Attorney**

February 22nd-26th — **Tri-Annual Practice Enhancement Retreat Week**

March 2nd (4pm EST) — **How to Use the New Software, Post TAPER Update**

The Lifeblood of Any Good Business

by Julieanne Steinbacher, Million Dollar Solution

The lifeblood of any good business or practice is the ability to attract a consistent flow of clients through the doors. In order to do this, you need to keep evolving your practice to offer not only what your clients want, but what they need. Attorney Julieanne Steinbacher, President of The Million Dollar Solution, is here to tell you why you need to be offering financial products with your repertoire.

Up until now, financial products have been largely unchartered territory, but that's true no longer. We have cracked the code to practice success in the financial services arena, and we want to share it with you. A lot of attorneys believe they shouldn't be involved in any way with financial services, thinking it is unseemly or not lawyerly, and they believe it takes away their ability to advise their clients in an unbiased manner. That's what we thought, too — but we were wrong. Instead, we found that we were doing our clients a disservice by not becoming educated about the role financial solutions can play in helping protect our clients. Incorporating financial products into your firm could be the key to the success that you so desire.

The Million Dollar Solution, home to Leading Lawyers on Estate and Long Term Care Planning, and the Senior Estate Planning Institute, is dedicated to assisting elder law and estate planning attorneys build a profitable practice while most efficiently and effectively serving their clients. Through conferences, mastermind sessions, testing ideas, their website, www.planningandprotecting.com, and a multitude of other resources, The Million Dollar Solution has helped leading attorneys in this field transform not only their practices, but their lives.

We are honored to have The Million Dollar Solution speaking at our "lunch and learn" on Friday of the Tri-Annual Practice Enhancement Retreat - "Incorporating Financial Services: See The Data, Run the Numbers, Enjoy the Success" you can see the full write up on the agenda and we'll see you there!

http://retreat.lawyerswithpurpose.com/agenda/#incorporating

Stop by our booth for more information!

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Or Call our Office at 1-800-785-9569

LAWYERS WITH PURPOSE

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Tri-Annual Practice Enhancement Retreat

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