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Getting Results From Your RMS

Amanda Bossow, Implementation Specialist

What does RMS even stand for and why should I be doing it? RMS stands for Relationship Management System, contrary to popular belief the R stands for Referrals. By using Power-in-Partnership and a good value proposition, you can easily and effectively work with professional relationships to grow your referral marketing.

What is Power-in-Partnership? It means you are willing and able to enroll yourself into the needs of others by using your skills to support them in meeting their objectives AND you are willing to enroll others in your needs and get their agreement to use their skills to support you in meeting your objectives.

How do I know what my value proposition is? Although everyone's value proposition can vary, here at Lawyers with Purpose, we often see something like, "We are a firm that is absolutely dedicated to educating the community through workshops which includes a free vision meeting afterwards. We have solid processes in place that support clients through the entire estate planning journey, including trust funding,

which leaves our clients 100% satisfied. We also utilize similar processes to support our synergy partners and their businesses." Your value proposition is entirely up to you, but it is something you 100% believe in and can commit to, not just with your professional relationships, but your clients as well.

Now that you know and understand the three core elements of the RMS System (Relationships, Power-in-Partnership, and your Value Proposition), you can start reaching out to professional contacts to start a new conversation or continue building the relationship.

Just like any other marketing strategy, consistency is key! You can't just have one meeting with someone and be guaranteed they are going to want to support you and your business. What have you done to support them? There are three main meeting types involved with the RMS system: Synergy, Strategy, and Relationship Review.

Synergy: Step one is to have an initial conversation to determine if this is a relationship you want to grow.

Getting Results From Your RMS (Cont.)

Strategy: Step two is determining HOW you can support each other.

Relationship Review: Step three is to continue meeting and growing the relationship.

Bear in mind, not everyone you meet with is going to be a good fit. Likewise, you may not be a good fit for them. That is OKAY! You may need to kiss a lot of frogs to find your prince (or princess), but when you find them – they are worth it!

How often you have RMS meetings depends on a variety of factors such as location, team support, and allotment of time. We generally suggest two meetings per week. This can be any of the three meetings mentioned above. If you are meeting with two people per week, you can be sure you'll find people who want to engage in Power-in-Partnership with you.

How are you going to find about six people a month to work with?

- Look at the people who are already sending you business and reach out to them. If you've never done a synergy meeting, start there and if you have, it's time for a relationship review meeting to get the ball rolling again.
- If you've been doing the LWP Process for a while, you should've already been collecting your current client's Financial Advisor and Accountant information on their Personal & Financial Information forms.
- There are also several networking organizations out there to help support you in growing your RMS system. LWP has a strategic Partnership with FSP (Society of Financial Service Professionals) who would be glad to assist you in finding a group in your area or even helping you start a new one!

- And finally, good old cold calling. Open Google and search for Financial Advisors, Accountants, etc. in your zip code and reach out. (Hint: We have scripts to help with this!)

What if you've been doing synergy, strategy, and relationship review meetings for a while and aren't having great success? Maybe it is time to step back and re-evaluate your process.

- Are you confident in your value proposition conversation?
- Do you follow-up and complete your commitments?
- How often are you meeting with people?

If you feel you are doing everything right and it's still not working, maybe it's time to step even further back and look at the common denominator—YOU! Maybe you aren't the best person to be doing the RMS process. Maybe someone else in your firm would be more comfortable having the meetings and subsequently following up, keeping in constant contact, and massaging those relationships.

There is no wrong approach when it comes to RMS. except for not doing it at all! If you'd like more guidance on how to implement RMS in to your firm, it's time to get your own practice coach and implementation specialist to support you!



Lawyers With Purpose would like
to recognize **Ben Rust** as
JANUARY 2019 *Member of the Month*



What is the greatest success you've had since joining LWP?

My biggest success has been utilizing an Irrevocable Trust to protect a firearm collection for clients that they have built for their children.

What is your favorite LWP tool?

My favorite LWP tools are the Workshops, Estate Planning Auditor and the Vision Clarifier. These tools are super for the client enrollment process and I like how well they roll into each other.

How has being part of LWP impacted your team and your practice?

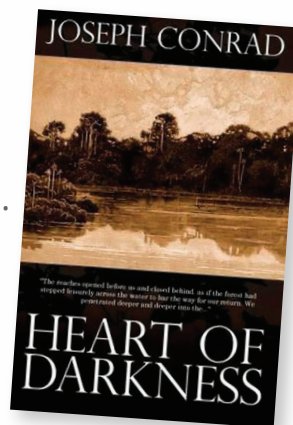
LWP has impacted my firm by allowing us to have a great structure. It gives the tools to be able to use that structure to build on.

Share something about yourself that most people don't know about you.

One thing that many do not know about me is that during college I was a basketball cheerleader.

What is your favorite book and how did it impact your life?

The book that impacted my life was *Heart of Darkness* by Joseph Conrad. It was introduced to me in high school as part of a book class. It allowed me to realize that I was able to do college level classes during my time in high school. It also allowed for me to realize that reading literature was more than just a leisure activity.



Congratulations to you on your continued success!

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LEGACY LETTERS

Brittney Shearin, ESQ

“Legacy Letters” or “Ethical Wills” are documents written by an individual to convey values, beliefs, life lessons or even family stories to his or her family members when they pass away. This is not a legally binding document, nor something for which you can charge, but it is still something that adds value to your clients’ estate planning experience.

You know the stereotypical scenes in a television show or movie: Someone dies and the lawyer calls the family in for the “reading of the Will.” Of course, we know this is not actually how probate or Wills work.

Recently I have had a handful of clients who wanted to leave words of wisdom and well wishes for their families. All of them asked whether that is something they put in their Wills. I told them it does not typically go in the Will, but I was more than willing to reference it in the Will for them.

Most often, clients want to give some final words of closure to their loved ones. It can be a simple statement of “I love you” or a more bold declaration of forgiveness or regret. Some choose to leave “instructions” for their children which often turn out to be true words of wisdom mixed with some comedy. When it is a short sentence about their ongoing love for their children, or something similar; I always offer to put that in the “My Family” section of the Wills. When it is something more lengthy – i.e. more than a paragraph or so – I tell them they should write or type it, and then I give them the option of keeping it at home in a fireproof safe, or giving it to our office to hold in their file.

Legacy Letters are a very old tradition. If you want to bring the concept into the 21st century, try suggesting for the client to make an audio or video recording for their family and friends instead of a hand-written note. If they store it on a zip-drive or other external source, you can still offer to keep it in their file to distribute to family upon their passing.

As I mentioned, this is not a money maker, per se. It is, however, a quality product you can provide to your clients. It allows them to feel a sense of peace that they will still be heard after they have passed on. It enables them to leave a heartfelt message to their loved ones instead of the “legalese” they may find cold or detached in our existing Wills. Even though Legacy Letters are not something for which you can charge, they are one more thing that can set you apart from your competition. If you have a client who is price shopping, and you can provide them not only the legal expertise they need, but also the sense of comfort for which they had hoped, that is better for your business than whatever you would charge for the Legacy Letter itself.

Remember, this is not a document drafted by your office. It is merely a counseling conversation to have with those clients who are looking for the ability to leave words of wisdom to loved ones after they have passed. You are providing something invaluable to your client, and isn’t that really what a large part of estate planning is all about?