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Automated Workflow Management: The Top 4 Reasons Why You NEED Automated Workflows in YOUR Firm!

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Utilizing an automated workflow management system makes it much easier to have greater insight into your business by easily generating reports instead of having to dig through files or spend time locating the information you need.

With automated workflow management, you and your team are held accountable by auto-generated tasks set specifically for certain roles. Your ability to communicate both internally and externally is more effective because everyone is aware of the specific step a client is on within the process and how to keep clients moving efficiently through your process, overall. By having more effective communication and staying ahead of the game, your clients and referral partners have a greater satisfaction with the services you provide. Lastly, the ability to produce top notch documents is now easier than ever, and you can be sure the information needed is entered properly without having to spend a ton of time reviewing and editing.

Increased insight into how your business is doing

Wouldn't you like to:

- Know if/where a client gets stalled in the process?
- Prevent any client from falling through the cracks?
- Be able to measure your KPIs?

With automated workflows you can easily answer the following questions:

- How many clients do I need to retain this week in order to meet my revenue goals?
- How many individuals are registered to attend our workshop this week?
- How many prospects are at a follow-up step from the workshop we had last week?
- How long has client John Smith been at the vision meeting step?
- Who is coming in to design a plan this week?
- What is my retention rate and average fee?
- When are we getting paid next?

All of these questions can be easily answered by placing the matter into the proper step within your automated workflow. With just a few clicks of the mouse, you can generate a report to review if follow-up has been completed timely and effectively, if your marketing is working properly, and if your cash flow projections are on track. With automated workflows, everyone is aware of the tasks they have or have not done, and that which you inspect, people will respect. You will have fewer accountability issues in your firm when everyone is conscious of their work.

Increased accountability and communication for you and your team

By utilizing automated workflows, you can move past the days of to-do lists when team members needed to keep a record in a notebook of the things they accomplished in a day.

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Automated Workflow Management: The Top 4 Reasons Why You NEED Automated Workflows in YOUR Firm! (Cont.)

By utilizing an automated workflow management system, you can view and delegate tasks and know if they are in progress, whether or not they were completed, and the amount of time it took to complete them.

If you see a ball being dropped, you can take a proactive approach to prevent a problem instead of discovering it when an upset client contacts your firm. Simply running a report will reveal if follow-ups were completed in a timely manner. Likewise, if you are scheduled to draft documents for a client, a task can be generated to remind you so you can stay on top of your own workload, too. With automated workflows, when you calendar and link appointments, they will auto-generate the tasks for your upcoming meetings. This ensures that you have sufficient time to complete your tasks, eliminating the potential for unpreparedness or having to cancel meetings last minute, both of which could cost you revenue and credibility with your clients.

The automated workflow has a built-in communication system that decreases the need for untimely interruptions. Adding a note to a client matter each and every time someone has contact with either the client or the matter itself keeps everyone in the loop. Even the receptionist can review the notes to ensure that the paralegal is currently drafting the documents that the attorney will review prior to a signing meeting with the client this coming Wednesday!

Increased satisfaction from clients and referral partners

As part of their standard value proposition, LWP members can confidently demonstrate to their prospects, clients, and referral partners that there is a process to prevent a lack of communication, and that 'balls very rarely get dropped.' You will have a standard process to which you adhere that ensures you can deliver on your promises. Clients gain more confidence in your services when they don't have to be the ones reaching out all the time and holding you accountable, and the more enjoyable the process is for the client, the more they will want to refer others. Staying ahead of the issues and concerns increases client satisfaction.

Improved quality of deliverables

Another added benefit for utilizing a workflow management system is the use of plug-ins! By utilizing a plug-in for HotDocs, you have the ability to draft documents right from the cloud as well as having some of the information from the client matter preloaded into the software. This leaves less room for error and more continuity with documents. The review process can be completed in less time, and you can be confident that names and addresses were transferred properly. "Copy and paste" can quickly become a thing of the past!

We have found that when LWP members use automated workflows, it not only keeps them on task, but they are able to distinguish themselves above the rest!

Save THE Date for our next **TAPER**



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Lawyers With Purpose would like to recognize **Denis P. Rischard** as **MAY 2019** *Member of the Month*



Located in Oklahoma City, Oklahoma, Rischard & Associates, PLLC has been a LWP member since 2017. Founder and Senior Partner, Denis P. Rischard, has over thirty years of experience practicing law in Oklahoma and is also a member of the Oklahoma Bar Association as well as the founder of Oklahoma Disability Elder Law Advocates (ODELA). After having served as a litigator for 26 years, Rischard transitioned to elder law and had been practicing in that area for four years prior to joining LWP. In addition to running his firm, Rischard is also a devoted parent to the nine children he shares with Susie, his beautiful wife of over three decades.

LWP interviewed Denis Rischard to talk about his firm and the changes it's experienced since becoming a member.

What do you believe sets Rischard & Associates apart from your competition?

Our goal is to provide an exceptional "legal experience" to each of our clients—and it begins with our culture. We think the culture of our firm and the camaraderie of our team is distinct. We all work well together, we respect each other, and we enjoy serving our clients. It really is a familiar atmosphere, and I think our clients sense that, allowing them to become more comfortable and open to letting us serve them and their families.

What was the deciding factor in choosing LWP over other competitors?

The holistic approach to running the elder law and estate planning practice—from the revenue focuser and time templates to the planning and billing software, it's all there, and it is enabling us to obtain the efficiency, and ultimately, the proficiency, we had been seeking. We signed up on a Thursday and went to our first TAPER the following Sunday, and my team and I were so excited about jumping right in. Since that time, we've made lots of necessary changes, and the results have been significant!

Speaking of TAPER, what's one of the best tips you've gotten from attending?

"Follow the system" is definitely the tip that's stuck with us. And it wasn't the easiest to follow at first. I had been practicing elder law for over 4 years when we joined LWP, and I had been a litigator for 26 years before that, so we had traditional law firm processes in place. Frankly, we were not optimizing work flow and cash flow in the manner the LWP system promised to provide, but now that we are (close to) being fully implemented, (close to) fully following the system, the growth we've seen has been phenomenal.

What kind of growth have you experienced?

Due to a major shift in our firm's infrastructure last year, we went from a three (3) attorney law firm with diverse practice areas to becoming a solo practice in Elder Law and Estate Planning. Prior to becoming a sole practitioner, it was challenging to fully implement the LWP system. However, since October 1, 2018, we became fully committed to "Following the System." Since our re-establishment of our commitment to embrace the LWP system in whole, we have experienced an increase in potential new clients, workshop attendees and revenue. Although there is always room for improvement, we are excited to see more growth.

The last eight months, specifically this month, has been our best period of growth. Since the transition in October 2018, we have seen almost a 60% revenue increase.

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

The greatest success we've had has been implementing the Revenue Focuser and enhancing cash flow. It has streamlined our work and given us the opportunity to achieve the financial goals we've set for ourselves by working smarter and not harder.

What is your favorite LWP tool?

For me, personally, it is probably the color-coded time template. It has changed the way I schedule my time: green, blue, yellow (I made purple my personal time!). I think my team's favorite tool is probably Actionstep; it keeps all the tasks they need to complete organized and on schedule.

What are the biggest challenges your clients are facing right now? Are you seeing any trends in your clients' needs?

The biggest challenges most clients face seem to be whether to make the investment to plan ahead to avoid the potential for the "unknown." That's our main focus—to help them arrive at the prudent decision to plan ahead so as to bring about peace of mind.

Any advice for attorneys who are new to estate planning and elder law?

The first thing to do: Seek out a mentor (or multiple mentors) on whom you can count to share their experience and provide guidance on how to learn the practice and the business of the practice. I did that—and it was a Godsend!

What is something about you that most people do not know?

Aside from the practice of law, my other "avocation" is being a basketball coach. I started coaching local middle school teams after I graduated from law school, and I coached a high school freshman boys team for several years. One of my greatest pleasures in life, however, has been coaching my kids' teams. I've coached 7 of my children for their school and tournament teams, and some of my fondest memories come from those times.

Congratulations to you on your continued success!

Advance Healthcare Directives and New “Death With Dignity” Laws

Brittney M. Shearin, Esq.

In 1997, Oregon enacted the Death With Dignity Act (“DWDA”), allowing Oregonians the right to end their lives under certain circumstances.¹ The terminally ill person must be at least eighteen (18) years old; a resident of Oregon; capable of communicating health care decisions for him or herself; and diagnosed with a terminal illness that will lead to death within six months (all as determined by an attending physician).² Furthermore, the patient must make two (2) oral requests, at least fifteen (15) days apart; he or she must provide a written request to the attending physician; and a consulting physician must confirm the attending physician’s diagnosis.³ This is not an exhaustive list of the requirements, but it will suffice for the purposes of this article.

Keep in mind, the process is not considered “euthanasia”, as that would require the doctor to administer the medication.⁴ Instead, the patient must be able to take the medication, orally, on his or her own accord.⁵

I familiarized myself with Oregon’s Death With Dignity Act when I wrote a paper about it for my “Economics of Health Care” class in college. Since then, six (6) other states (California, Colorado, Hawaii, New Jersey, Vermont, and Washington) and the District of Columbia have passed their own versions of the DWDA, with nearly identical requirements.⁶ Many people feel the DWDA allows individuals some final sense of control over death and see it as a humane way to end suffering. Still others feel the DWDA allows individuals to “play God” or fear that people may try to abuse or misuse the system despite the safeguards and requirements in place.

New Jersey is the most recent state to enact a version of a DWDA; it becomes effective August 1, 2019.⁷ Interestingly, none of the states that have a DWDA have been able to amend or expand the act from its relatively narrow scope of individuals.⁸ Legislators in New York State fear the current Death With Dignity laws do not go far enough.⁹

Most commonly, terminally ill cancer patients are benefitting from the law, but people with degenerative diseases may never be able to use it. For example, individuals with ALS, Huntington’s disease, oral and laryngeal cancers, strokes, or Parkinson’s disease, among others, may have a life span of ten years or more, disqualifying them from immediately requesting to end their life.¹⁰ However, by the time they reach the six-months-to-go mark they may no longer be able to verbalize their wishes or may not be able to physically swallow the prescription.¹¹

Oregon is currently working to amend its legislation to add an option for an injection instead of the sole option of the pills.¹² Other states are pushing for special language in health care directives allowing an agent to elect for Death With Dignity for the terminally ill patient who is no longer able to make his/her wishes known verbally.¹³ For perspective, Canada has Death With Dignity laws which allow physicians to administer the medication to those patients who are unable to do so on their own and does not require the request to be made within a certain time frame.¹⁴

No matter your feelings on the subject, it is important as estate planning attorneys to understand how this legislation may work – or may not work – in conjunction with health care directives in your state. Right now, because the laws require the terminally ill individual to make a verbal request, an advance directive cannot legally authorize a Health Care Agent to make a request under the DWDA for the terminally ill individual, in any state.

Even if it is not common to have terminally ill clients or clients who fit into the relatively limited rules of the DWDA, it is important to know how the law works in your state. And, as the laws continue to evolve, it is important to make sure your clients know what their Health Care Directive does and does not permit. Even though we are not doctors it is our job to stay on top of the law side of the health care industry.

¹Oregon Health Authority, *Death With Dignity Act*, Oregon State Website <https://www.oregon.gov/oha/PH/PROVIDERPARTNERRESOURCES/EVALUATIONRESEARCH/DEATHWITHDIGNITYACT/Pages/index.aspx> (last visited May 13, 2019)

²*Id.*

³*Id.*

⁴*Id.*

⁵*Id.*

⁶Jacobo, Julia, *New Jersey Governor Signs Law Allowing Terminally Ill Patients to End Their Lives*, ABC News (April 14, 2019) <https://abcnews.go.com/US/jersey-governor-signs-law-allowing-terminally-ill-patients/story?id=62391589>

⁷*Id.*

⁸Bump, Bethany, *New York’s Right-to-Die Debate Omits Important Group*, Times Union Newspaper (last updated April 26, 2019) <https://www.timesunion.com/news/article/New-York-s-right-to-die-debate-forgets-people-13797085.php>

⁹*Id.*

¹⁰*Id.*

¹¹*Id.*

¹²Hayes, Elizabeth, *Details Emerge Surrounding Controversial Changes to Death With Dignity Act*, Portland Business Journal (May 10, 2019) <https://www.bizjournals.com/portland/news/2019/05/10/details-emerge-surrounding-controversial-change-to.html>

¹³Bump, supra note 8.

¹⁴*Id.*