LAWYERS WITH PURPOSE

MEMBER NEWS

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MAR 2018

IN THIS *issue*

We Missed You In Tampa!

Written by Briana Moriarty

Our most favorite thing to do here at LWP is planning our Twice Annual Practice Enhancement Retreats (TAPER) and the hard work paid off when we got to see all of you in Tampa. This retreat kicked off our new twice a year program schedule and had break out sessions for the attorneys and team members to attend based on their role in the firm.

We hit the ground running with new and veteran members attending the Practice with Purpose program which is three and a half days of comprehensive mastery training on the Lawyers with Purpose systems and processes on Medicaid, lead generation and conversion, trust drafting, and cloud-based workflows. This program serves as an introduction to our systems and processes for our new members and a refresher for our veteran members. It was awesome to see team members attend this program and we know they will take the education back to their offices and create new possibilities. We love seeing members in the room together working through their struggles and celebrating their accomplishments.

Wednesday morning was the kick off the to TAPER the theme was all about practice proficiency and how each person in the firm plays an integral part in the business. We began with morning break out sessions focusing on the LWP Client Centered Software, Advanced Actionstep, and Delegate the Workshop: Train a Team Member. Each session brought members together to learn new strategies to bring back to their firms and gave them time to bounce ideas off each other.

The software breakout session was a CLE approved program presented by Dave Zumpano and dug deep into the intricacies of the LWP- Client Centered Software and provided members hand on experience on how to best utilize our trust drafting and Medicaid Qualification software to provide the best counseling to their clients.

The Advanced Actionstep breakout session provided members with a sneak peek at the all new Enhanced Billing Mode, Actionstep is launching this year and those who attended the session were the first ones to see all the new capabilities that make invoicing and accounting easier to use inside the Actionstep platform.

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We Missed You In Tampa! (Cont.)

Delegate the Workshop: Train a Team Member breakout session educated the team members that they too can present the workshops. This idea was tested for over a year in the Lab and brought those in attendance up to speed on why they may want to have team members host the workshops. We also released the Estate Planning Workshop Guide which is brand new material members can use in your workshops and is available for purchase on the LWP Store.

Our afternoon key note speaker brought together those in the Practice with Purpose program and the morning breakouts to listen to the amazing Scott Burrows. Scott was a star athlete who was involved in a life altering car accident that left him a quadriplegic. Scott's vision, mindset, and grit helped him over come all the odds and his story moved the audience to tears as he stood up out of his wheelchair. He spoke to the group about how with vision, mindset, and grit, the challenges we face aren't tough to overcome, it's all about perspective.

The funding strategy session was an excellent presentation by Dave Zumpano that taught members how to properly fund the iPug trusts. This session provided real life strategies our members could take back and use when counseling clients. The team members attended the Building a Client Centered Law Firm where we discussed how team members roles are important to getting the client through the process and how it is crucial to have accountability for themselves and their team members.

Thursday was a powerful day that began with a morning full of marketing conversations and how to get the LWP Relationship Management System to work for you. It was a coaching day to get the audience to understand that everything they do is marketing and branding. The afternoon brought us all together to put pen to paper and plan out the next four months. This was a powerful session with too many "aha" moments to mention. Thursday night was the BOAT CRUISE!! This was a fun evening out where we chartered a yacht and sailed around Tampa Bay while we ate, drank, and danced under the stars.

We wrapped the week up with an invigorating WHY Day with Irina Barnov, an executive business coach who trained us on how to have more meaningful conversations with one another and how important it is to pay attention to those who you're interacting with. It was all about how to have a coaching conversation versus a management conversation. The feedback throughout the day was inspiring.

Here at Lawyers with Purpose, we understand, it can seem like a big undertaking to shut your offices down for a week but consider the possibility that by making the investment to attend our Twice Annual Practice Enhancement Retreats you and your team will see growth both personally and professionally. Being in the room gets you around like-minded individuals who share the same struggles and successes you have.

Do us a favor, now that you're done reading this, go to your calendar and block out the dates for our October program. October 16th thru 20th in Syracuse, New York. See you there!

Thank You! *Written by Amanda L. Smith, ESQ*

I wanted to say thank you to our members—both new and old—that attended LWP's February Practice With Purpose Program in beautiful Tampa, FL. As PWP trainers, Tim Crisafulli, ESQ, Briana Moriarty, and I enjoyed connecting with our participants throughout the week and learning more about each of your practices. It's always a joyful experience seeing the "aha moments," which inevitably happen for each person in the room at some point during the live training. For our veteran LWP members, you likely have similar memories of your first experience attending PWP. The week is often described as a wealth of information coming at you just like water rushing furiously from a firehose. This "firehose effect" is what allows us to cover so many topics in great depth during our limited time together. As LWP's Director of Education, my goal is that each of you leave PWP with the confidence and competence to embark on a journey toward having the practice of your dreams! Don't fear; the learning doesn't stop when you get back to your offices. Lawyers With Purpose has many resources available to propel your practice to the next level. From one-on-one appointments with our implementation specialists, practice coaches, and Actionstep consultant to live legal-technical training, our entire team is dedicated to your success. If you're not currently taking advantage of all LWP has to offer, give us a call to see how we can support your team's goals for 2018.

To your continued success,
Amanda L. Smith, ESQ

Lawyers With Purpose would like to recognize **Claudia DeJesus** *as*
FEBRUARY 2018 *Member of the Month*

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

This is a tough question to answer because there have been many milestones since joining LWP. Since joining, our firm expanded and opened its doors in Bonita Springs, Florida. This success is multi-level, from our ever-growing team - hiring new staff - to the high demand for workshops, to developing relationships in the community where now The Mattar Firm is becoming a recognized name. The overall growth of the firm in the past year is our greatest success and LWP was an integral part of that growth.

What is your favorite LWP tool?

My favorite LWP tool is the Marketing Dashboard. Phil introduced The Mattar Firm to this tool recently and we have implemented it into our systems. At our firm, we love metrics and numbers. We firmly believe metrics allow you and your staff to have accountability and are essential to the success of any firm, regardless of practice area. This particular Dashboard allows us to have a yearly and monthly snapshot view of marketing, inbound calls, client service coordinator and attorney conversion rates, and revenue. The tool has pointed out that our client service coordinator has a fantastic rate in relation to initial contact to workshop registration. As our firm continues to grow, it will be invaluable for keeping track of each department's performance and attorney statistics.

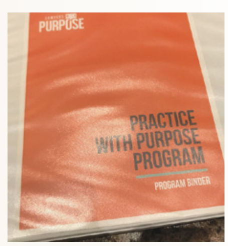
How has being part of LWP impacted your team and your practice?

Joining LWP has impacted our firm in tremendous ways. Our area of expertise before LWP was auto accident injury litigation. The LWP team helped our lawyers and staff shift from our previous practice area to understanding the nuances of Estate Planning, Asset Protection, and Medicaid Planning. LWP has done everything from guide our firm through the relational process necessary when dealing with senior clients, to teaching us Medicaid law in and out. The journey of transitioning practice areas would have been much more tedious and time consuming without the help of LWP. Additionally, LWP has opened the door to likeminded contacts throughout the legal community by encouraging members from different cities and states to communicate with one another.

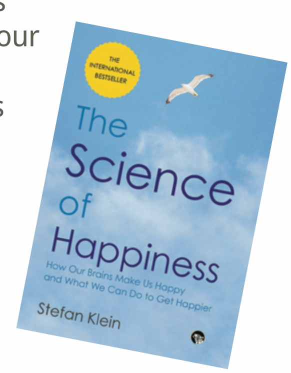
Share something about yourself that most people don't know about you.

Most people do not know that I was a competitive Rower throughout my high school and college years. I still practice rowing to this day – getting on the erg for workouts and if I am lucky, being able to get some time on the water.

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



The PWP binder – Medicaid section. Kidding (maybe)! The book that comes to mind is *The Science of Happiness: How Our Brains Make Us Happy* by Stefan Klein. As a fact finder, I am constantly searching to understand "but why does that work that way?" This book breaks down what mechanisms inside your brain trigger certain emotions, actions, and reactions. I read this book in 2006, and to this day I will reference sections of it and think "that action or reaction is a result of this chemical affecting X aspect of the brain."



Congratulations to you on your continued success!

TIPS *and* TRICKS | Increase Your Client Retention With The Client Goal Focuser

Written by Phil Miner, Implementation Coach

Did you know that your Client Goal Focuser can help to increase referrals and enroll more professional relationships, too?

In Part 1 of this article series we explored why the "The Client Goal Focuser" is one of the most important tools used in client enrollment and the estate planning process. You may already know just how powerful this resource is if you implemented it into your practice!

How to Turn Synergy Meetings into Strategy Meetings:

In your Synergy Meetings, are you finding like many members, financial advisors say one of their biggest frustrations when working with attorneys is the attorney follow up?

Have you ever heard a professional relationship say, "Once I refer the client, I never hear anything back"? How do you make sure you are not that attorney and instead keep your promises and maintain a strong professional relationship? This is where the Client Goal Focuser comes in.

If you want your Synergy Meetings to produce referrals you must illustrate the 10 points of contact. Use the Client Goal Focuser to demonstrate the value of the 10 points of contact. Start at the Vision Meeting showing how track everything the client indicates they want to accomplish and is important to them, discuss how your counseling uncovers different issues and concerns that are important to the client, they might not have realized on their own. Point out that they could learn something new about their client. They might recognize a financial issue that the client did not discuss that could be important to the planning process. Also point out that by communicating about what the client is trying to accomplish, it may open the door to additional financial products or insurance.

Don't stop at the Vision, let them know you will send it following their Design Meeting, to keep them current with how their client is progressing and also if anything additional was discovered in that meeting that could open the door to different opportunities.

Then be sure to show them that after the client completes the Signing Meeting you will send them a completed form, showing the client has initialed they understand their plan, how their issues were resolved, and even a mini roadmap where to find them in their documents. This gives everyone involved peace of mind and confidence that the plan will work.

When you demonstrate this value in your Synergy Meetings you will find it is much easier to schedule a Strategy Meeting and start discussing how you will work together rather than having a good meeting that goes nowhere. It is important you demonstrate your value, help a professional relationship see there is more in the partnerships than just receiving referrals.

Team Involvement is Key for Ongoing Referrals

Keeping this open communication with your professional relationships should also engage your whole team to see RMS is not just one or two people in the firm, but everyone has a part. Who in your firm will be responsible for sending the Client Goal Focuser to the referral source after each step?

Some questions to consider include:

- Does your team know your top referral sources and the promises you have made?
- Does your team know if certain relationships have special access to you?
- Does your team contribute to maintaining strong relationships?

This highlights to the client that you're providing much more of a service. Everyone in the firm has a role in the Relationship Management System. The Client Goal Focuser is a great way to help everyone see that and identify their role, and help you create value, keep your promises, and help you have strong relationships with your top referral partners.

If your last few Synergy Meetings didn't produce results, and you did not use the Client Goal Focuser, use it to demonstrate you value and you should be on your way to a Strategy meeting when you are done!