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## Your Practice Mastered December 2014 Coaching Call

*With Richard James*

**Richard James:** Hey everybody. Good afternoon. Today is a coaching call with Richard James. This is Richard James and we are on with Your Practice Mastered December coaching call. In many ways our gift to you—those folks who are new to the call we are giving this gift away. Normally this is a private closed door session but I have opened up the doors in the spirit of Christmas to allow folks who have not been able to experience this before. They have the opportunity to ask some questions if they'd like. So we have—this could be a scary call because I've got some questions possibly coming from some people that I don't know all that well. But that's okay. That's what this is all about. I want everybody to get some introspective and I want the folks who have been on with us for a number of years to be able to hear from maybe outside folks to hear what questions they might have about marketing or business management when it comes to running a law firm.

A couple of housekeeping rules: The questions that are going to be asked on this call are really there's no holds barred. You can ask any question you'd like as long as it's pertaining to your practice or a question about managing your practice or managing lead flow in your practice or converting leads in your practice. It could be about cash flow or it could be about upcoming goals for 2015. It's kind of Vegas rules around here. What happens on the calls stays on the calls; but I certainly wouldn't mention anything that's overly sensitive to anybody that's on the call just simply because this is an open call.

So I want everybody to know that I'm excited to dive into this. We've got an abundance of people on the line. I get the luxury of being able to be in control of what's going on here so I can see how many people are on and we are racking up. They still keep coming in by the second and so we will be opening up in just a second.

A couple of housekeeping things: First and foremost we are coming on the end of the year. I want to wish everybody a Merry Christmas and Happy Hanuka for those of you who are celebrating Hanuka the end of the week. We are looking forward to a real festive time of year for automated business results. And the team of Richard James, we have experienced an amazing God-blessed year. It has been a wonderful year what we've been able to help hundreds and hundreds of attorneys and we've experienced some fantastic growth and we've gotten some remarkable stories.

We have additional training this week for those of you who are on these other programs. For those of you who are in any of the levels that allow for staff training, we are launching our first live staff training tomorrow. Wednesday at 2 o'clock will be a live sales training for intake folks or out-bound call center folks. We are going to be or maybe better said I am going to be training the same way that I train my sales associates. And our team members on the phone will be downloading and listening to an actual call from the law office and then training the members of the team that are on that call about what they did right, what they didn't do so well, how to make some overall general improvements. So we're real excited about that. Everybody's going to get to hear my style of training which is one of the most common questions we have.

On Thursday for the Titanium Level Mastermind members we have a closed-door locked session for those Mastermind members to catch up after the amazing meeting they had in November. So they will be excited to



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be on that call together on Thursday. So as a reminder for those of you who are on the call who haven't been getting our e-mail reminders you do have a call on Thursday. Let us know if you can't be there.

And then we have our upcoming news for 2015. We're real excited to announce our latest release which is something called Partner's Club. We've been trying to listen to what everybody's been telling us about what they love about our program and what they'd like to see some more of. So we've designed a new program that's in the mid-level pricing and it's actually going to have some real Mastermind live events tied to it. More details on that to follow. We'll be releasing that starting in January. If you are working with a marketing consultant as of this date you can reach out to them. They might be able to give you some more insight about it. But know that we'll be releasing more information about that future. I'm excited because it's going to put us in front of live events for folks and the feedback that we got from a live event, Mastermind event, that we did in November was just attorneys love getting to a place where they are with like-minded entrepreneurial attorneys and actually got to ask them questions.

So on today's call this is an open-mike call so anybody can ask anything they want. Certainly if nobody asks any questions I can keep talking. I think everybody who knows me a little bit knows that I can fill up an hour worth of conversation. And truly if nobody has any questions I won't be offended but we have a lot of people on the call today so I have to believe that somebody has got a question about something.

Again for those of you who have just joined us this is Richard James. We are on this month's open mike call. It's December. It's our gift to everybody that has not had the opportunity to experience what one of these calls were like. There are no questions that are off limits; however we would like you to limit them to business-related questions if possible about your practice or what things you are struggling with. Or maybe what's going really well and you want to tell everybody about it. That would be great too. You're welcome to ask me personal questions if you would like. I don't know how that would help anybody but I'm happy to answer any questions that you might have about me or what it is that I do or how we run our practice.

For those of you who don't know how to get onto the call, what you have to do is you have to press \*2. Now I want to warn you if you press \*2 too many times it will toggle you in and toggle you out. So only press it once. You press \*2 and what will happen is you will raise your hand. When you raise your hand I will see it come up and then I will bring you on to the call. I will have you introduce yourself and then I will have you ask your question. Then I will answer your question as completely as I can and certainly as honestly as I can. If we go for a half hour here and nobody asks any questions, I will talk as long as I can and then if nobody asks questions we will end the day early. But I'm also willing to let it go a little later. The call is scheduled for an hour but if everybody raises their hand and you've got lots of questions I'm happy to answer them for you if you'd like. I certainly have some questions that were handed to me by my business manager John. He's brought me up to speed with a couple we receive e-mail and I can start us off that way. But again at any time you want to come on to the call to ask questions it is \*2.

We will not be interviewing anybody on this call today. This is an open mike call. So whatever question you have whether it be about your book if you're writing a book, maybe it's how to use the book. Maybe it's about cash flow. Maybe it's about setting goals for 2015. Maybe it's about how to train your sales staff or train your



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attorneys. Maybe it's management challenges that you're having or setting up work flow challenges. Maybe it's figuring out how to increase your pricing. That's one of the big things we talk about around here is about how to generate more revenue by increasing your pricing. Focusing on your collections. Maybe it's how to convert the unconverted lead. Or maybe you use Infusionsoft and you have a general Infusionsoft question. Hey heck I'm a Infusionsoft certified consultant. For those of you who don't know what Infusionsoft is, it's a CRM which is a client relation management tool that automates communication and allows you to harvest the order entry and billing data about your client so you can run end reports so you can show the cost per lead and cost per client on every single lead source. You can operate with a shot gun laser beam rather than a shot gun.

I'm going to start off by kind of tossing out one of the questions that was asked from a member that John gave me a question of which was—and I see some hands that are starting to raise. I'll get to you in just a second. One of the first questions that was asked to us was in a lot of our programs we mention about managing client communication. And what is the overall benefit of managing client communication? And more specifically how do they do it? Like how do they manage this practical application of it. So that's the question and so let me give the answer. So let me build the framework for this so we know.

I believe in developing specialists in a law firm. So one of the number one complaints about all law firms, the bar associations, is the lack of client communication. And so as we go through this process and we start to unpack how we manage that we've tried every way imaginable just so you're aware. I've tried everything you can think of. From making sure that we left a voice mail on the phone that said hi this is Betty and if your call comes in before three o'clock you can expect a call back today before five o'clock Eastern time—time today in whatever time it is in whatever area time we're at. Sorry. And then it would also say if you left this message after three p.m., you can expect to hear back from us by five o'clock the next business day. If you do leave a message and you don't hear back from us within the time we specified, you can dial extension 301 and reach my supervisor. Well in the law firm I built knee cap to knee cap I was the supervisor and so my phone would just ring off the hook.

So I believe that there is actually a better way. No matter what game I invent, no matter what reward program I invent I couldn't get people motivated enough to just respond in a timely enough manner. So here's what we did. We developed a specialist inside the firm and we allocated so that they would answer all of the client communication. Now the reason why this was possible was what we started to do was we harvested all of the basic questions that were asked from all the people and we narrowed it down to about 15 most commonly asked questions from all the clients. So these questions seemed to come up all the time. Once we nailed off those 15 most commonly asked questions, this one person because they had a template to answer from could handle 90 to 95 percent of the questions that came in. The questions that came in that couldn't be handled by them we gave them direct access to an attorney to get their questions answered and we made a manageable time period by which they can communicate with the attorney. Not kind of as they needed to. Not kind of as per diem or as the brain fart hit their brain. But really on a scheduled program so the attorney wasn't being interrupted.



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And what we found was, here are the results. So before we did this we measured something called net promoter score. I measured the satisfaction of the client base. And the satisfaction of the client base we measured on a scale from one to ten. It's asking one simple question of your client. On a scale of one to 10 how likely are you to refer us to a friend or relative. That is the key question that's to be asked in something called a net promoter score. The idea is that anybody that's a 9 or a 10 is what we consider a client evangelist and they should be nurtured and they should be given gift cards and they should be taken out to dinner and they should be really well taken care of because they are the people who will give you testimonials and people who will shout from the roof tops how wonderful you are. And then the people that are the sevens and the eights, they are client neutral, almost agnostic. You did an okay job but they're not going to shout from the roof tops but maybe you can nurture them into a better client experience if you just identify what they'd like to have done better. And then there's the six and below and those are the detractors. Those are the people that really you need to pay attention to. They're not happy about something. You need to get on the phone with them right away. You personally and you need to figure out what you did wrong and try to fix it because they're going to be the ones to give you bad Google reviews. They're going to be the ones that say bad things about you in the community.

And we were trending at a 4.5 out of 10. So we had a horrible score, horrible score. What we did was is we put this specialist in place. Now we actually used some software that managed. We worked with Infusionsoft to measure the time it took to get us back in touch with everybody and we were running an average of 58 hours to communicate with somebody when we first started doing this. So once we started funneling everybody through this specialist, it was taking us 58 hours to get back in touch with everybody in the beginning. After we developed the specialist and gave them all the questions to answer and started measuring again and we got it down to eight hours. And by going from 58 hours to 8 hours—by the way that includes weekends both cases. We went from an average score of 4.5 to somewhere around 8.2. All of that was because we developed a specialist.

Now there's a pain involved here and this is why the question came up. So that was the first framework behind the question. The question was how do I go about doing it because I'm struggling with forcing my clients to communicate with only one person. They're used to communicating with the paralegal of choice that's been assigned to their case. And again everybody I remind you that \*2 you can raise your hand. Anybody that wants to raise your hand can raise your hand by pressing \*2 and it will toggle you in and it will raise your hand and I'll bring you on the call. I do see some people I'll bring on in a second.

So the answer is well we know that all the other ways we tried to do it, allowing the paralegals to answer their own questions, having the attorneys answer their own questions, using special messages, giving them a special phone number, all these different things that kind of ran into allowing multiple people to touch the case and not really measuring it we found our client satisfaction score was just really low. And whether that was because of capacity issues or that was just because people were not really good at communicating or because they were fragmented, there's a lot of good reasons for it. But at the end of the day we found that when we changed over to the specialist role and gave it to one person to answer the questions we ended up with a score of over eight. And just to be clear, a capacity has a lot to do with this. I've worked with firms that have done this exact same thing and they didn't have one person that answered questions. There are some



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firms that I know of that I've worked with, they had four people that were in a room at all times and their job was not to do nothing but answer questions from clients and those four people were on the phone constantly all day long. And that was their job literally in one room. Four people to answer questions. It was a high volume firm. So you change the number of people that are specialists depending on the volume. And of course you measure that mathematically.

But the way that you do it is at the point of retention when you're sitting knee cap to knee cap with that client or whether it's over the phone, you make sure that you communicate with the client that here is the e-mail address you're going to communicate to and here is the phone number that you're going to communicate to and we push everybody through e-mail. And the reason is we want to be able to track it most efficiently and e-mail is the way to do that. So they're not happy about communicating through e-mail. Even if they call they get a voice mail. They don't get a live person and it tells them to send e-mail. It says if you don't have e-mail that's okay. Leave a message and we'll process it through for you so we can track it. And then what happens is any voice mail would get put through the e-mail system for tracking and we could track how long it took to get a hold of somebody. Now yes, somebody would have to pick up the phone and call those folks that didn't have e-mail. But because we push everybody else through e-mail the number of people we actually had to talk to was very little and we actually were able to get the vast majority of people through e-mail.

Were there people who did not like communicating through e-mail and tried to push back? Yeah. Most of those people were existing clients that were used to being able to call Betty on the phone and leave a message for Betty and Betty would call them back because they were one of her favorite clients and Betty actually liked talking to them. And so those are the people who didn't like doing it this way. But for all of the new clients after we washed all the old clients out. You know the average client life cycle was about seven and a half months. Once we got through seven and a half months and all the new people were coming in they were trained. This is how we did things. There were still a couple of people who preferred to pick up the phone and call. And even though they balked a little bit they still gave us those eights and nines in customer-client satisfaction reviews and would say I would really liked to have been able to get a hold of somebody directly.

So there's a really long answer to a very simple question. Let me get on to somebody who's raised their hand here. I'll bring you on. I don't have any way of knowing who you are but you'll hear it say you're unmuted. And then just, if you would, tell me who you are, where you are from and what your question is. So you should be live.

Michael: Hello Rick. How are you?

Rich: I'm great. Who am I speaking to?

Michael: My name is Michael. I'm calling from Houston.

Rich: Hey Michael. How are you?

Michael: I'm doing well thanks. I appreciate the call. I'm in a situation where I practice with four other attorneys. I'm a new member to your group and I would like to implement some of the programs. They have a different practice than I do. The best way to describe our partnership is we are an expense-sharing arrangement although we are really a partnership. How can I help them buy into some of the things like making sure staff doesn't use cell phones during work periods and some of the other things that I would like to implement for my 20,000-, 30,000-foot view, which may not be consistent with theirs?

Rich: Yeah, so it's a great question and I don't mean this tongue-in-cheek but my uncle used to tell me all the time the only ship that never sails is a partnership. Right? So there are challenges with partnerships. Now listen. Partnerships are in law all the time and so I say that tongue-in-cheek because I know a lot of partnerships that actually do work out. The biggest challenge is exactly what you said which is the buy-in. The question that you asked was how do I get the buy-in. The problem that I heard was I've got a lot of other folks that are in the office that I'd like to make changes to that I really don't feel I have the authority to just make the changes without getting their buy-in. So let me back up and ask some questions.

How many staff members are in the firm?

Michael: Just two.

Rich: There's two of you. So it's you and another—it's you and—

Michael: Oh no. There's four—there's four attorneys and two staff.

Rich: Two staff. And so the things that you'd like to see changed, are they with the staff members or are they with the attorneys?

Michael: The staff members.

Rich: Okay. Good. And so everybody shares the expense of those staff members, correct?

Michael: Correct.

Rich: Alright. And those staff members, are they—tell me what they do. Are they receptionist and paralegals or bookkeepers? What do they do?

Michael: One's a receptionist-paralegal. The other's a bookkeeper-paralegal.

Rich: Okay. And so both of those folks communicate with the clients throughout—what kind of case law are we talking about?

Michael: I do personal injury but the other folks mainly do real estate.

Rich: Okay. On the buyer and seller side transactional? Or are they doing real estate litigation—



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Michael: They're doing real estate, mainly buyers. Mainly buyer-seller bank work that kind of stuff. Office practices.

Rich: Okay. So there's the paralegals are managing, the paralegal and the bookkeeper, they are managing. You do utilize them in your practice, right? If you get a—when you have a case matter you bring up—they answer the matter into whatever system you're using.

Michael: They open files. Exactly. We share—

Rich: Okay. And they manage your docket for you as well?

Michael: I manage my own docket.

Rich: You manage your own docket. Okay. So and the biggest challenge that you're having is, is it their—do you believe it's their work ethic? Or tell me what the biggest challenge is.

Michael: Yes. Yeah, work ethic mainly.

Rich: Okay and do you believe that the other folks—do they see the problem too or do you think that they're blind to it?

Michael: A couple of them see the problem. One especially wants a more cum-ba-ya type office where we're not a bunch of hard asses.

Rich: Okay. Very good. Well so but we also want the work done. Right?

Michael: We want the work done and we want a certain atmosphere.

Rich: Yeah. So does anybody else—the people that you have working those two employees, do they ever not meet deadlines?

Michael: Yes.

Rich: Okay and do they have—okay. So let me start by saying this. Tell me about the hierarchy of your partnership. So when you look at this is there somebody that's in charge of kind of marketing or do you each market for your own practice individually?

Michael: We market on our own.

Rich: And is there somebody that's in charge of the office in general or do they kind of leave that up to the two employees to manage.

Michael: There's one partner who's kind of overseeing the books but otherwise we're all equal.

Rich: Okay. So nobody's really raised their hand to take—to step forward and say listen, if it's okay I'd like to—I guess here's my question. Do you think that if you stepped forward and said hey I'd like to volunteer to manage the work flow a little bit in the office or at least measure the work flow in the office a little bit. Do you think they would allow that to happen because none of the other ones are going to do it?

Michael: Yes.

Rich: Okay. So good. So you believe you can get their buy-in to let you do it. Yes?

Michael: Yes.

Rich: Okay. So that's step one. Step one is the buy in to allow you to shoulder some more of the burden of managing the work flow of the business. Step two is putting in some real measurable inspection points for you to use as evidence. Lawyers like the evidentiary process. Right? So it's you want to be able to provide them with here's what the base line of life looks like right now based on what they're doing. In module 9 and 10 that you may or may not have access to; but just if you're not there yet or you're—depending on what level you are in—forgive me Michael for not knowing exactly what level you're in.

Michael: That's fine.

Rich: But talk to your marketing consultant and they can get this for you. But there is a form that I use that—it's an Excel spreadsheet. Basically what it does, the first place you start with all staff members is to identify three fundamental areas in their world. There's a saying that a staff member, any staff member, us included as members of the team are to either be able to make the company money or save the company money. Would you agree with that statement?

Michael: Sounds great.

Rich: Okay. So they have to be able to make the company money or save the company money. I believe a super star does both. Alright. They know how to save the company money and make the company money. So the way that we identify what they're—if their alignment of this is matching our alignment of this or our expectation of this is to actually have them list what it is they do. So here's one of the best exercises. There is a spreadsheet and you can create it based on our conversation right now or if you're in the program you can ask your sales associate to get you the—or marketing consultant to get you the download copy. But what it does is it has them do a couple of things. It has them list all of the tasks that they do for their job. Whether it be daily, weekly, monthly, whatever. Okay? And then it has them rank those tasks in accordance of three basic things. One is I want you to rank. If you've got 50 items on your list and they very well may have 50 items. They may have more items on their list because it's a small firm that does a lot of different practice areas and there's two people kind of managing it. So they may do many things. So what we'll want them to do is rank them in three ways. One in the order of importance that they think that it makes the company the most money. So which item on their list do they believe makes the company the most money? And so the number one item would be the thing that they makes the most money and number 50 would be the thing they think makes the least money of all the things they do. Make sense?

Michael: Yes.

Rich: Now the next column over they're going to rank the same items. But this time they're going to rank them on what they spend the most time doing. So what's going to happen is they're going to rank from number one, the number one thing. That's what they spend their most time doing to the number 50<sup>th</sup> thing. That's the thing that they spend the least time doing. So the numbers aren't necessarily going to match. Most times they don't. The thing that makes the company the most money isn't necessarily they spend their most time on. But sometimes it is. And finally we're going to rank what they like doing the most. And so they're going to then rank the thing that they like doing the most with number one and the thing they like doing the least number fifty and everything in between.

Now what this is going to allow you to do and they'll final call—and by the way also asks who else do their work with to get this job done. And in every case maybe they do things independently or maybe they work with the other person or maybe they work with the attorney. But it's good for them to let you know if they're doing these jobs on their own or if they're doing them with somebody else. What's going to happen is you're going to be able to align yourself. You're going to be able to sort that spreadsheet and they'll clearly see. Oh I see. Betty believes that answering the phone and convincing clients to schedule a consultation with the firm makes the company the most money. She sees that of all the things she does that's in alignment. But guess what Betty likes doing the least. Answering the phone and scheduling people into scheduling client appointments. Right? So what's going to happen is you're going to have these alignment issues and you're going to be able to clearly identify one, what these people are actually doing; two, what their opinion is of what makes the company the most money; three, what they like doing the most and four how that aligns with what they spend their most time doing. And can you see the insight you're going to be able to garnish from this exercise?

Michael: Yes.

Rich: Okay. So now you've gotten the buy-in from the partners to be able to go ahead and say to you you can manage it Now we've gotten a baseline approach for you to be able to go back to the partners and say okay here's what we've identified based on what the staff has told me they're doing. Now you're going to be able to realign expectations and maybe you may be able to simply juggle job duties because you find out Betty's doing something that she really doesn't want to be doing. And she's doing a lot of it and Sally actually really likes to do the thing that Betty doesn't want to be doing and she's not doing very much of it. And you can start to develop some specialists in the firm and let them do this stuff they really like doing and you'll get more productivity out of them. It just may be we're asking a cat to be a dog in some cases. And so sometimes just changing job duties can simply fix all of your problems. It may mean that God forbid we don't have a super star on board and you have to make that decision as a partnership as to what you're going to do about that. But I'm hopeful that that's not the case. I'm hopeful you can just make some carburetor adjustments.

And then from that document you're going to be able to build a couple of things. The first thing you're going to be able to build is you're going to be able to build an operations manual. Does your firm have a working operations manual as it stands?

Michael: Not really. We have a three-page—we have a three-page employee—we have a three-page employee manual.

Rich: Okay. But nothing that says in order to change the—in order to water the plants you must use the red bottle on the second shelf third from the right.

Michael: No.

Rich: Okay. So do you understand the value of having a manual like that?

Michael: Yes. I'm trying to develop it for my work.

Rich: Okay. Good. So what happens is is that because they've listed all the things that they do, now and I know that they're busy, but we're going to have to carve out time to do it. And there's a lot of different ways and you can either bulk time out. You can give them a day to do it. You can do a little bit every day and kind of harvest it as you go. But what happens is they'll now take the list that they've given you of all the tasks that they do and now what I want you to do is have them list. Take every task that they do and I want them to literally write out a step-by-step instruction on how they would go do that task. Now some people would say well that's simple. It's just open up filing cabinet B and put, you know, do this and say okay. That's great. That's what I want you to do.

What do you mean? And I equate it to learning how to cook my grandmother's sauce. So my wife's Italian. She had an Italian grandmother. She passed away years ago. When I met my wife when I was 16-years-old. So years ago we'd go over to her house. Everybody would always say Grandma you've got to write down your sauce, your recipe for sauce. And every Sunday she'd say the same thing. I don't have a recipe. I do it in my head. And so one Sunday I said Grandma what time do you get up to start your sauce. She said five in the morning. I said alright, next Sunday I'm here at five in the morning. You're not coming at five in the morning. I said I'm coming at five in the morning. I'm going to learn how to make your sauce. Okay, you come. I'll show you. Well little did Grandma know I was going to drive her nuts that day because what she did was is she would start to cut up the onions and not onions, she didn't use onions in her sauce. She started to cut up the garlic and when she'd cut up the garlic she'd go to throw it in. I'd say stop. She'd go what do you mean stop? I said I've got to measure it. What do you mean measure it? I don't measure anything. I know but we're going to measure it today. And I would do this with everything she would do. She'd go to put salt in. I'd stop her. We'd measure it. She'd go to put the oil. I'd stop her. We'd measure it. We put the tomatoes in. We'd stop her. We'd measure it. Drove her crazy. Took her twice as long to make the sauce that she normally would. And she said we're never doing that again. I said good. We never have to because now I've got it on paper. We have that recipe to this day.

And that's what has to happen. Now I'll argue by the way. Don't tell my wife this but it's not as good as her grandmother's but it's close. Okay? But we have that recipe now because we were able to do that. So your staff is going to do the exact same thing. They're going to make a recipe for everything they do and what oftentimes is asked of me is how far you should go. The answer is you should go as far as put the paper

clip on the stack of paper like this. When you've gotten that far you know you've gone as far as you need to go with the destructions—or instructions on how you do a particular task. Does that make sense to you?

Michael: Yes.

Rich: Did I create any questions around this for you so far or any doubt?

Michael: No doubt and I'm sure I'll have a lot of working questions but I'll talk about it with when I get there.

Rich: Okay. Yeah. And then the final thing that you're going to do is, as you develop these points, the key if you remember. And you may or may not remember this, but I talk about there are three fundamental structures to any one system. The three structures are harvesting of the data. The second is inspection via report and the third is automation. Now in a work-flow management system like we're talking about right now whether it be manual or whether it be through a case management program of some kind, we are talking about inspection via report. So the question is how do we create inspection via report? Well the things that you want to inspect via report are the buckets of the law firm. In personal injury there are several buckets. First is if you look at the buckets of a personal injury case it's not—up until they come a lead—up until they become a client the lead comes in. Then we have to identify is it the type of case that we want to have based on whatever filtering we have. Once we have the case then it is did they actually sign the documents. Then it is did we do all of the—once they become a client did we do step A, step B, step C, step and all the way through to all the way leading up to trying to get a settlement or possible court date based on what type of case it is and the moving parts. So there are buckets that you would manage.

A good friend of mine, John Fisher, for those of you PI firms out there, yourself included, Michael. He wrote a great book.

Michael: Yeah. A great book.

Rich: Systems. You read that book?

Michael: It is one of my Bibles.

Rich: Yeah. Okay. Great. I agree. I won't replace the Bible with it but I'm with you. For systems it is a systems-like Bible and I get that. John Fisher did a great job. So he did a good job of laying that out for you and giving you those buckets. That's the same thing that you want to create for the paralegals in not only your practice area, their general work, but your partners' practice areas too so you can identify inspection points along the way. And then you force them to self-report on those inspection points. Make sense?

Michael: Yes.

Rich: Okay. Any other questions around that?



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Michael: Can I ask one different question very quick?

Rich: Yeah. Let me do a commercial break for you real quick though just to make sure everybody—because I've had a bunch of new people come on the call. So again this is Richard James with Your Practice Mastered. We have an open-mike call this month. I'm asking—answering questions. I'm willing to answer any question that you have. If you're on the call just to listen, that's fine. I'll answer questions until they're gone. We're about half-way through. I've got a couple more questions on my list from people who have e-mailed in. But I want you to know that there's no question that's off limits. You can ask anything you'd like. So far we've been talking with Michael from Houston about management. Before that we were talking about client communication. So if you want to raise your hand, the way that you do it is you press \*2. \*2 you raise your hand and I'll see it. Again there are no questions off limits.

Michael, go ahead. Ask your next question.

Michael: Do you know anything about the CRM that's included with Foster Web Marketing?

Rich: I do. Yeah. I know some about it anyway. I know that I know this. Better than nothing. So what are you used to right now?

Michael: Nothing. But I do have Infusionsoft. Should I learn Infusionsoft or just go with the CRM and Foster?

Rich: Okay. So—if you learn the CRM and Foster are you going to do away with Infusionsoft?

Michael: Yes, I would.

Rich: Okay. So what I—here's what I don't know. Here's what I do know about Infusionsoft and I do not know—and here's what I would suggest you do to identify about the CRM and Foster. As I understand Foster CRM, it's a CRM or it's an Infusionsoft light. Okay? So here's what I know about Infusionsoft. What I know about Infusionsoft is it allows you to store the data about every single lead source, not just lead sources that are on the website but any lead source from any place that you advertise. It also allows you to store the cost for that lead source so that when you run your lead-source ROI report you can simply show yourself how to—you can run a report that shows you your cost per lead and your cost per client.

Now on a PI case, a PI firm, the cost per lead and cost per client is such a valuable piece of information. And here's the reason why it's so valuable. Because if you can understand what your ultimate cost-per-client case acquisition is—in 2015 I built myself—I built myself—I built for everybody in the middle of our program a goal-setting guide for 2015 and one of the points of the goal setting guide was understanding what your cost per case was for 2015. So you can understand. You said if I take on 10 new cases a month right now and next year I want to take on 15 new cases a month. That's my goal. And every case costs me a thousand dollars. You need to know that you'll need \$5,000 additional in case acquisition costs every single month.



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And if you know that you're going to have 12 months in PI. I don't know what kind of PI attorney you are but if you've got a 12-month turn around on your PI cases. Is that a fair statement or is it longer or shorter for you?

Michael: It's about that.

Rich: Okay. So if you've got 12 months to turn around before you see a check and you want to bring on five new cases at \$1,000 a case you know you're going to have a cash outlay of \$60,000 before you start to recoup some of the money that you've outlaid going forward. Does that math make sense to you?

Michael: Yes, yes.

Rich: So the reason why Infusionsoft is so valuable is because it will tell you that information. That's one primary reason Infusionsoft is so valuable. The other primary reason that Infusionsoft is valuable for me is because it allows you to communicate in the five senses of communication. Now I don't know what Foster does or does not do. I know it allows you to automate communication. I just don't know how far you can go. So with Infusionsoft you can communicate with a text message. You can communicate with an e-mail. You can communicate with a voice broadcast which means you could record a message to remind people to come to their appointment and blast that out as a reminder. You can communicate through direct mail. And you can communicate naturally through e-mail. And you can track all of that communication to see exactly what's going on in your system.

Michael: Rich—

Rich: You can also—go ahead?

Michael: You said text, e-mail, voice, direct mail and then I think you said e-mail again.

Rich: E-mail. I did, yeah. So voice blasting, text messaging, direct mail, e-mail and the last one is phone call. So if I repeated e-mail I apologize. One is phone call.

Michael: Okay.

Rich: Phone call can be tracked both in-bound because you can use third party app called Fix Your Funnel and you can record all of your calls in-bound and you can track your lead sources from your in-bound calls as well right into Infusionsoft. And then out-bound, so on your unconverted leads—so anybody who called in to your firm. What kind of cases do you take? Do you take soft tissue and slip and fall?

Michael: I take soft tissue but in all fairness to everybody else I don't want to monopolize your time. So—

Rich: That's okay. I appreciate it. I'm willing to—I want to just make sure I answered your question completely. Does that make sense?



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Michael: You did. My head is about to explode. So I'm going to let you get a different call. Thank you very much. I'm very new and I'm looking forward to growing my practice.

Rich: Alright Michael. And I just blew a newbie's mind. That's good. I guess I accomplished my goal for the day. My wife would tell you I don't know how to stop talking. So thanks for raising your hand. Merry Christmas to you.

Michael: You too. Good-bye.

Rich: Bye-bye. Alright. Next one up. Let's see. I'll turn Michael off. There we go. And I'll turn you on.

Alright. Welcome to the call. This is Richard James. Who am I speaking with today?

Alfredo: Hi Richard. This is Alfredo Risano.

Rich: Hey Alfredo. How are you? Long time no talk.

Alfredo: Yes. I'm in San Antonio. My question is what would you say are the top three things as far as marketing to persons that do not use Internet. You get lead conversions or you get leads from other—whether radio, TV, whatever. They come into your office but there's just that segment of society that they just don't have a computer or they just don't use e-mail.

Rich: Yeah. So in your world I happen to know—So to be clear—can I tell everybody the practice area that you're in?

Alfredo: Sure, sure, sure.

Rich: So you're an immigration attorney. So I have another—quite a few clients who are immigration attorneys. One of them here is in the Valley. And we had this challenge in the beginning so I'll say a couple of things. First while I believe you I also believe Maria Jones. In the very early stages of our relationship that one, they either didn't have e-mails or didn't use e-mails. And we built her entire Infusionsoft system to answer your question on text messaging and direct mail. And what she found was is that text messaging was working great. So we built all of the follow-up sequences on text message. Not just the reminder e-mails but we also built all of the unconverted lead e-mails or text messages there to. So all of the communication from anybody who called the office and didn't set an appointment. From anybody who set an appointment and didn't show up. From anybody who showed up and didn't hire. What we did is we sent out a text message and you could do it one of two ways. You could do it in simple language and it's just “hey, reminding you to pick up the phone and call us if you have more questions” or you can actually drive it to a blog post with a bit URL because you only have so many characters in text message. You can put a little link in there called a bit lead link and it will drive it to a page on your website that is an article about a particular subject matter relevant to their case type. And we found that to work really well.



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However I have also found that Maria—well Maria found. I didn't find that as she got more intense about this and more on purpose about this, she found that that information about them not having—your clients not having e-mail—was not as accurate as she originally anticipated. And here's what I mean:

Though originally she was able to capture for e-mail addresses and physical addresses less than 20 percent of the people who called in gave an e-mail address or physical address. One, because they either said they didn't use e-mail or because they didn't give an address because it's an immigration case and they're skeptical about giving addresses.

Alfredo: Right

Rich: So in the beginning stages she had one part-time person fielding calls and kind of making calls. And when we looked at her call volume we realized she just didn't have—based on the amount of calls she had coming in, she had to get a new phone system for us to be able to do this because her current phone system didn't give her the data she needed. But once we got all the measurements in place we were able to identify. My gosh. All the calls she had coming in, this person just couldn't handle it all and they couldn't handle all the outbound.

They couldn't make any outbound calls reasonably to convert any unconverted leads. And she ended up growing her phone staff. Now when we started she had a half a person. Today she has six and a half people plus a whole special department just for managing collection calls.

So what we found is as she started to grow this and she had more people. It was like managing a department. And now she decided one day she was going to set a goal. And she said if you set 80 percent—if you get 80 percent of the people we talk to their e-mail address and their physical address I'm going to take you all out to lunch on me. We're going to go out to lunch. Take the afternoon we're going to go out to lunch together on me. Lunch of your choice. And one goal for one week went from capturing less than 20 percent to capturing not 80 percent but they captured 100 percent of the time.

Now were some of them probably garbage? Were some of them probably not as quality? Yeah. I'm sure. No doubt about it. But I guarantee you that a whole bunch more that we originally anticipated were there than she originally thought was possible. Because what was happening is her reps were just taking the no for an answer. And they didn't understand that their job on the phone was to not only listen twice as much as they spoke so that they could build a relationship with them, but their job was to sell that person on the value of the information we were going to provide to them and sell them on the importance of getting it. And so they really learned to do that by scripting and by training. And because she did that and because she set that goal she was able to see that happen.

So my answer is two fold. One, text messaging is the one we found works really well. Second, direct mail also works really well by sending out shock and awe packages to folks who schedule appointments so that we can increase the show rate. And the third thing that I would say to you is don't take it at face value that all of the people that are not giving you e-mail addresses and physical addresses actually don't have them. I bet more people than you believe have them actually do have them.

Alfredo: Yes. And I've learned that sometimes I'll ask for an e-mail during a consultation because I'm just kind of following up and making sure. And so they'll say oh I don't have one. Then I'll ask do you have Facebook? Oh yeah, yeah, yeah. I have a Facebook account. I'm like okay. So what e-mail did you use for your Facebook account. Oh my niece set it up. I don't know the password to that. So it's—yeah. It's funny how that works.

I'll follow up with one part B to the question. So would you recommend—would you recommend that obviously you gave me the answer there is get an e-mail address and get at least a physical address to send them an awe package. Did I understand that correct? Should I send them that awe package even when they set up that consultation? Right before—even before they get to the office?

Rich: Do you know what your show rate is right now?

Alfredo: Yes and no. I'm going to probably say it's about 60 percent.

Rich: Okay. So we know that—we know that we were running from Maria. For a while she was down—well not just Maria. I'm picking on Maria because you're an immigration attorney and she's an immigration attorney. Let's not pick on Maria for a second. Another firm that I was working with, a firm that I built, we were running show rates as low as 35 percent because we were measuring it through Infusionsoft.

Incidentally for your own benefit you should make sure that you talk to John or somebody on my team to make sure you have a dashboard on your Infusionsoft account so you can see that number regularly. But that's an aside note.

But anyway we knew what the show rate was and so we added a shock and awe package which was basically—you can get as sexy at this as you want. We kept it simple in the beginning with a manila envelope with a copy of the book and the book wasn't even printed in a binder form. It was literally printed on 8-1/2 by 11 paper stamped rough draft with a cover letter in there saying hey we wanted to get the book in your hands as fast as we can. Here is a rough draft of the manuscript and literally signed by the attorney. And we saw our show rate go from 35 percent to 46 percent. So that's a 30 some odd percent improvement in show rate. Well when you start to measure the value of—for every 10 people you meet you sign five of them as clients and you increase your show rate by some 30 percent, that's 30 percent more people—in this particular case for every hundred people that's an extra 16 people that you have a crack at that you didn't have a crack at before. And if you have the same kind of hire rate which is 50 percent, you have eight more hires coming in the door. Well if you have a client value of \$3,000, that's an additional \$24,000 of revenue. When you start to roll this stuff out and don't look at it from a cost perspective but more look at it from an ROI perspective, it just blows your mind actually how valuable one little carburetor adjustment can be. So yes, the answer is I would send a shock and awe package out to everybody that schedules a consultation with you. Make sense?

Alfredo: Yes. Thank you very very much. I appreciate your help.



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Rich: You're welcome. You're welcome. I just got an e-mail—do you have any other questions by the way?

Alfredo: No. I do but I want—I'll let everybody else. I'm sure that you've got a ton of questions. I don't want to hog the phone.

Rich: Yeah. No. It's funny. We've got dozens and dozens and dozens. I won't give away the number but we've got a lot of people on this call and we don't have a lot of questions. So folks I want you to know you can ask them. I've got a couple here I'm willing to go a little bit longer. But if we don't have questions at the top of the hour and we run out. I will pull the plug. So this is a real opportunity for me to spill my guts unless you don't like to hear me talk. But listen my friend, Merry Christmas to you. Thanks for being on the call today.

I will move on to the e-mail question I just received and I've got another person in line and I'll let them ask a question as well. Alright?

Alfredo: Thank you.

Rich: You're welcome sir. Alright. Let's see. I just got a question from—let me turn him off. There we go. Scott from Wisconsin asks a question about how long do you suggest talking to a potential lead on the phone for a bankruptcy client? That's a really really astute question, Scott. And here is my attorney-like answer. It all depends. I know. So here's why I say that.

Because if you've got somebody who's on the—well first of all I want to make sure I make something really clear. My golden rule is attorneys do not talk to potential clients. Okay? There's a reason for that and I don't know if you're asking this question. We're not on the phone so I don't know if you're the one that's talking to them; so I'm assuming we're asking that somebody else is going to talk to them. But if it was the case in which you were saying you're talking to them, I want you to know that I don't believe attorneys should be on the phone with clients before they get into the office. Unless they're running a phone consult, a true phone consult in which you schedule an appointment and you try to get somebody to hire you over the phone. I'm not a fan of that but I do see its place.

And the reason that I don't want you to meet with people isn't because I don't think you are good at it. It's two reasons. One, it's because I believe that I want you focused on your highest and best use. I believe that I can hire somebody and train them at a much lower cost per hour than you are doing and so I think you could spend your time doing more valuable things. And three, if the truth be told, there are some attorneys that when they get on the phone they feel obligated to give free advice and they end up on calls longer than they should. So that being said with that caveat let me back into the question now for you and give you an answer.

A person who's on the phone with a consult who is a non-attorney, their job is to have one job and one job only. And that is to build enough of a relationship with that client so we move them to the next stage. Now depending on what your marketing funnel looks like and how you got the lead and where they came from will depend on what that means. What I mean is if you give away a free copy of your book, your



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conversation may be different because if somebody calls you in from an ad thing and they wanted to schedule a consultation.

The phone call has an anatomy to it. The anatomy of the phone call is that you want to make sure you do a couple of things. First and foremost you have to make sure that every phone call harvests the information. So that's the first part of the stage. Make sure we get their name. Make sure we get their phone number. Make sure we verify the caller ID they called from. Make sure we get their e-mail address. And then we ask them what is the reason that they called.

In bankruptcy invariably one of the questions is always well I just want to know what you charge. We've got to make sure we get around that. My golden rule number two is we never ever quote price over the phone. The reason is because I don't think we can because I think bankruptcy is complicated enough as it is and not every case is created equal. So we do not quote prices over the phone no matter how much they yell and scream. But if we do it right we won't have to worry about it because the next question is just supposed to be tell me why did you call our firm today? What's going on in your life? Do you have a repossession? Are you struggling with a possible foreclosure or did you get a garnishment? Or whatever based on what's going on in Wisconsin you have to ask that question appropriately.

Then you'll be able to then identify what their problem is and then you just ask. The person on the phone should say tell me more about that. Tell me more about that. And what's going to happen is they're going to start to open up to you regardless of whether they ask for price or not because the truth of the matter is the people that are calling probably don't have anybody else to talk to. They're calling you because they're probably at their wits end and they finally got the courage up to pick up the phone and have somebody help them with their debt. So the person on your end of the line has to be sympathetic or empathetic and they have to be an excellent listener and just ask the right questions to be a good listener. Whatever they say you're just going to ask to tell you more about that. The fact is that person that's on the other end of the line probably doesn't—they—probably they're embarrassed to talk to their friends and relatives or maybe their friends and relatives are sick of hearing about them because they've been going through so much struggle lately and they're just at their wits end.

If we do it right the average call length for a consultative call where we're trying to move them to the next stage which is set a consultation will be upwards of five to eight minutes. Let me repeat that. It will be an upwards of five to eight minutes. The reason I don't want attorneys on the phone is sometimes attorneys will be on the phone for half an hour and then they won't even get the order and they may not set the appointment. If your goal is to set the appointment and you want to do just enough to set the appointment and build a relationship so that they show up. You'll know if you're doing this right if when the person walks in the door they ask for Susie. That's the receptionist or the person you have answering the phone. If they are asking for Susie because they built a relationship with Susie you know that you've gotten this right. And that's all you want. That's the secret sauce to answering the phone. And now that being said it is a secret sauce. It is simple but it is not an easy answer because it requires ongoing training. I'm not putting a plug in but I will say that is why we've launched this training program for people who are on the phone to



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understand how to field these calls and better manage the anatomy of a phone call. And we'll do live training with our clients' team members to actually train them how to best answer the call.

Scott I hoped that answered your question for you. Let me move on to the next person that we have here that's in line to answer the question. We've got a few minutes left before the top of the hour. Let's see if we can bring you on. Hi, you are on with Richard James.

Ryan: Hi. This is Ryan Moran sir. How are you?

Rich: Hi Ryan Moran my friend. How are you sir?

Ryan: I am fantastic. It's been a great call. Had a lot of great take-aways. I actually have sort of a two-part question. The first one I'd like to start with if I could is I'm a bankruptcy attorney and November and December are traditionally our slowest months. I would say maybe December might be, you know, if we didn't do anything proactive, December would probably be our slowest month. And then it kind of gets back into gear mid-January. You know how it is.

I guess my first question, Richard, is do you have any suggestions for sort of priming the pump or revving the engine in December so that it can go from what would normally be a pretty, you know, not the best month to a month that is better. To make sure December is not so slow.

Rich: You want to—Okay. So the question is how to make December not so slow. Alright.

Ryan: Yeah, exactly.

Rich: Quickly I'll tell you that when I built that firm in Phoenix I heard every December and I was there for three of them. The first December was okay. Now I don't want you to get your hopes up. Decembers are always a horrible month and we blew November's doors off in December. And then the next year we heard December's always a horrible month so let's not get our hopes up. And we blew the previous December's doors off. And then we repeated that.

Listen, I just got an e-mail from a client who broke every record they've ever had in November.

Ryan: Wow.

Rich: December is not over yet. And this is a bankruptcy attorney. You know them. So It doesn't have to be slow. I'm told, by the way, I'm told in our business December's horrible. You can't get attorneys on the phone. You can't communicate with attorneys correctly. They won't listen to you. They're all caught up in the end of the year stuff. We have set more strategy sessions in this month than we have in any other previous month this year.

Ryan: Wow.

Rich: And so why is that possible? Well I think the first reason is, Ryan, is because I don't accept the answer that November and December are slow. I refuse to accept it. I understand that it may happen. If it happens so be it; but I don't go into it assuming. I go into it—I'm going to figure out how I can beat it. I think your questions, the two parts that you asked. One, how do you proactively and the second part prime the pump was a vital question. And so let me ask this.

Are you using—with your unconverted leads right now, are you using direct mail to communicate to your unconverted leads, no sets, no shows, no hires?

Ryan: You know it's funny. One of my take a ways was that shock and awe package. We typically only get e-mail addresses and phone numbers. We haven't been—for our leads once they come into the office we get the physical address. But we have not been collecting people's home address for the IC's, the initial consults, that we set.

Rich: Okay. So one of the tools that you have in our tool box is to be able to utilize that book concept. So if you switched the paradigm on some of your lead generation, one of the benefits to utilizing a book—and this is advanced theory—but it's nonetheless one that's appropriate for this conversation. If you want to capture more physical addresses and you start using the book in your marketing, when you offer to send them a free copy of the book whether it be through an online form or because they're calling in for a copy of the book, you automatically get the ability to ask for their address without feeling intrusive. Make sense?

Ryan: Absolutely.

Rich: So that's how we got around the question of how do I get an address for everybody? I just added a free book into everything which meant now every lead that I got I was getting an address almost a hundred percent of the time with the exception of any micro-continuity—micro-commitment sites that I was using where I was only capturing first name or e-mail addresses to try to get somebody moving into a funnel which is another advanced technique. But when I got somebody to the point of wanting to request a book be it on the phone or on line I got their address.

So the thing that we did to prime the pump was we created a three-part letter. Not a single letter but a three-part letter. I believe the book is *The Ultimate Sales Letter* by Dan Kennedy. He has—you can Google it. It's called *The Giorgio Letters*. It's an example of what a three-part letter could look like. So I really tailored it around these Giorgio Letters and we talked about the pain and the opportunity that goes on in their life as a possible bankruptcy client. We started talking to them in a way that nobody else is talking to them which is direct mail. Everybody else is using e-mail. Some people are using phone calls. Hardly nobody uses follow-up direct mail. So we were starting to arrive on their door step like nobody else. Of course the shock and awe package was sent with anybody who set a consultation. So two things. We're talking about lead conversion and one is using the fifth sense of direct mail as a form of communication which is going to—and that takes time. Direct mail is a long tail so that what you set is proactively priming the pump to set December up. You do this in the second week of December. You're setting January up for success. Right?

Ryan: Yeah, right.



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Rich: Because it takes some time. So the lesson learned here is let's start doing this for all the time and then December will always be a better month. But if we're going to do it to set up a particular month, let's do it in advance.

The other thing I would say is in lead generation when everybody else pulled back on lead generation I actually put my foot on the accelerator. So we use television and radio a lot especially after the election dies down. There's always some form of an election in November. December typically goes a little soft before the Christmas holidays picks up with the ads. So there's an awful lot of remnant space going on especially the end of November before Thanksgiving and after the election. Things have kind of died down and the flood gates open up with some inventory. You can pick up a lot of real bargain ads. So if I was normally paying \$150 or \$200 a spot I could pick it up for 90 bucks a spot and so I could get more volume for my dollar. Because I was willing to keep my spend the same where everybody else was dropping their spend. I also would increase my spend and give my agency a budget for a remnant space ad. So if they had a football game that was coming up that somebody—maybe a play-off game or whatever that was happening, I would—or college bowl game, I would let them go ahead and spend the two or three thousand dollars on an ad if the deal came up that was normally a \$20,000 ad that came up for \$2,000 ad. I'd give them a little slush fund to do it with. Now I always had an answering service back up so that God forbid they ran that ad without me knowing it. The phone number had an answering service backing it up so that we make sure that we field the calls. But we would step on the accelerator in these down months because everybody else was sitting back doing nothing saying woe is me. It's not very good in these months. So we tended to pick up business just because they were sitting around doing nothing.

Ryan: I like it. That's fantastic. Now we do—typically when we field an incoming call from a potential client we e-mail them a copy of our eBook. But did you notice a greater positive response from the mailing of the physical book versus attaching it as a pdf to an e-mail? It's got like the main purpose of the e-mail. It's kind of like also we have attached our eBook below. It's kind of like that.

Rich: Yeah. So the answer is the—it is not an either or answer. So it is a both and. However if a gun was put to my head and I could only choose one I am going to use direct mail a hundred percent of the time. And the reason is—there are a couple of reasons. Well there are several reasons. The first is we know that the average open rate even to a warm list is usually no higher than 20 to 25 percent. Sometimes it's higher but typically 20-25 percent is a reasonable open rate. Especially with an attachment of some kind. So I would actually not use an attachment. I would actually use a link to the pdf rather than an attachment so that it doesn't get stuck in spam filters.

Secondarily we know that when somebody gets an e-mail they may or they may not read it. They may put it aside. They may open the pdf and read it later, whatever.

Finally when somebody gets a book we don't know if they're going to read it but what I do know is they are not going to throw it away.

Ryan: Yeah. Right.

Rich: So there's a lot of—there's a long tail. What I mean by that is that there's a long—just like direct mail. It sits around for a long time. So you'll send somebody a book today and bankruptcy being what it is they may not make a decision for three to four months. And they'll call you three to four months from now because they got your book.

And then finally as a positioning tool for this concept of authorship, celebrity and expert, positioning you as an author because of the proliferation of eBooks these days, people don't actually see bloggers or eBooks or Internet people as authors. They see people who have a book as an author. But my mom when I went home last year and I gave her a copy of the new book that I wrote. It was a short book. It wasn't but 75 pages. Apparently I hadn't given her a copy of the other one. Shame on me. I'm a bad son. She had said—she said to me you're an author? Did you publish this? I said yeah, mom. It's just like the other one. She goes I didn't know you were an author. Oh my goodness. I've got to tell my friends. So of course she went to the grocery store. I went to the grocery store later on and somebody—the cashier said your mom was in this morning and she told me you're an author. Congratulations. It's a really big deal to people.

Now they don't understand how easy it was for us to do it. They don't understand the process by which it was to write a book. They think it's a big deal. So don't deprive yourself of that celebrity status of being an author. Send them the book.

Ryan: I love it. Yeah. It makes sense completely.

Rich: Make sense?

Ryan: Absolutely. And then I actually—can I just get one more quick one in or do we got to wrap this up?

Rich: Let's see. Let's see who we got. Who else—is anybody else in line? No, I have one more e-mail question that I have to answer and you. So I'll do yours and I will do—another one just came in. So I'm going to cut it off at your question and two more. Then I'm going to cut everybody off for the day. But go ahead and ask your question.

Ryan: You're sure. Alternatives consultation structures, i.e., telephone consultations and something we've never done before which is an at-home consultation. We will occasionally say well can I just do it on the phone or your office is too far in which case we offer them the option to do it over the phone. But I just kind of wanted your take. It's more just your opinion. What do you think, Richard, of telephone for bankruptcy that is. Telephone consultations as well as the potential of actually doing an at-home visit?

Rich: Yeah. So when I started it—the first primary answer is I'm a fan but I'm a fan with this caveat. I'm not a fan of doing it in replacement of. I'm a fan of doing it as a supplement to. And I'm also a fan only if we run it with the same level of structure that we run a traditional consultation. Which means it has to be set for a specific time. They must receive a reminder e-mail and a reminder phone call and a reminder text message. They have to know what they're going to expect. Their expectations are going to be on the call. The call has to be scripted and it should be run just like a regular consultation should be run. Absolutely no



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different. We want to hopefully have the spouses on the phone. Sometimes it's easier to run a phone consultation because you can get both spouses on a conference line. There are so many free sources like Uber Conference now. You can go get conference lines for 10 bucks a month and they're super cool. They record everything and multiple people can join them. You don't need pin numbers or anything and now your attorney or your non-attorney consultant can meet them on the phone and do the conference right on the phone. Yes, I like them used in the correct aspects and run in a systematized organized way and treated like a consult which means they get the direct mail shock and awe and everything else that goes along with it.

Now the place that they're best used is in long distance situations. So we—in Phoenix—Phoenix is a vast market. I mean it's just sprawling. So one of the normal things that bankruptcy attorneys will do in Phoenix, they will automatically open four offices: East Valley, West Valley, Central and South Central and Scottsdale. So they'll run these offices and they'll run all over God's creation to keep up with people. When we did it I said we're not doing that and he said well everybody else does it. I said I don't care if everybody else does it. We're not going to do it because what's going to happen is we're going to—if we want to find out how bad our systems are let's open up a second office. Right? We barely have our systems in place for office number one. We're just getting started. Let's not make our work four times as hard. So what we did is we ran phone consults. Once the systems were in place I instituted phone consults for the farthest parts because we did a study and identified that the average person was willing—the average client was willing to drive 13-1/2 miles to our office. So once I identified that information I can identify anybody in these zones we would offer a phone consult to because they were most likely not to show up.

Once we did that we started running a phone consult as an appointment just like we would a regular consultation. In the beginning it took a little time to get the scripting down. It took a little time to get the training down. But eventually we were generating five, ten, \$15,000 a week in phone consultation appointments where we were generating real live clients. And we would do it through signing the paperwork through e-mail and some cases after they signed up they would actually come down to the office for their consultation. At some point we actually started running delivering their documents by mail and actually running their consultations via phone as well. Does that answer your question about the phone consults?

Ryan: Absolutely. Yep.

Rich: There is advanced levels to that on the Skype calls, so the at-home calls. There is advanced levels to that to using—once your systems are in place using satellite offices and using Skype calls and satellite offices. It's a cool strategy. Using executive suites with big puffy leather chairs and great big television screens. Your attorney or your non-attorney consult is sitting in the office, in your main office, and they're literally meeting with somebody over Skype and how that works and there's lot of advanced structures there. But the answer is yes. Used appropriately in the right venue with the right structure phone consults can work.

Ryan: Awesome. Hey thanks a lot, Rich. I really appreciate it.

Rich: You are welcome my friend. Merry Christmas to you.

Ryan: Merry Christmas.

Rich: Alright. We have Valerie on the line. Valerie sent me in an e-mail. Valerie Lang from Ohio. And Valerie's question is—let's see—is there a hard and fast rule you adhere to regarding free initial consultation versus a fee-based initial consultation? And so Valerie I went to your site real quick just to figure out exactly as far as are you—what your practice area of law is. And from what I can see—so the answer is—if you haven't figured it out—the answer is it somewhat depends. Now what I mean by that is for a family law attorney I actually find that fee-based consultations have their place. For estate planning attorneys I actually find that fee-based consultations have their place. I have a high end tax attorney that does nothing but offering compromises and tax resolution where a fee-based consultation has their place. That being said I'm a pretty firm believer that I would rather get them in the door with a free consultation and then convert a similar percentage into clients, maybe a lower percentage but of a higher number and I end up with a greater gross. Let me give you an example.

Scott David Stuart is a family law attorney here in the Valley and for years we had a girl on the phone that would—was his great—one of his number one assets that did a great job of filtering and used to use price fixing. Didn't use paid consultations unless she felt that they didn't have the money based on their answers. Then she would charge them a fee. But she just used filtering, really strong filters to identify could they afford the fees. Would really price fix. Let them know what the minimum retainer was and stuff. And that's how they got to the door. And they did really well and they were growing at a regular pace every year and then unfortunately this person moved on and they were no longer part of the firm. So the new person that came on wasn't nearly as skilled at being able to do that. So Scott kind of had to pull the goalie and let whoever was going to come in come in. Now the concern was that his attorneys were going to be wasting their time with a bunch of people that weren't going to hire the firm and that their conversion rate was going to go down. Well I think his fear was right. The conversion rate went down. However, the number of consults they had went up to such an extreme that the number of hires that came at the end, he ended up when this happened with record month after record month after record month.

So do I believe that there is a place for a paid consultation? Yes. If you're a sole practitioner, a small office and you only want to vet who you're going to meet with so you don't waste time with a lot of people. Because you really don't have that much time and you're trying to grow your firm out of cash flow and there's just not enough of you to go around. I do see the placement for paid consultations. However, if you want to maximize the number of clients you have coming in and you have a sales process system in place where somebody else is doing the consults or you're doing the consults and somebody else is doing the work and you can have the band with the managers, I would really argue testing, pulling the consultation and seeing if there is a different result. I will tell you I've had people do this and they have come back and told me that the results that they had was that the consultation fee brought them a higher quality candidate of a client and that's what they wanted to deal with. But even though they were getting a higher conversion they weren't willing to deal with the lower quality candidate of a client or the prospects. So my answer is test it. I hope I've given you a good attorney non-answer answer. But my goal is I'm always—I always want to try pulling the filter of an appointment consultation fee and driving more consults to see if we can't get a higher conversion and higher clients in the door.



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Okay Valerie. I hope that answers your question. Scott, I've got a question from you. Okay. Same Scott. So what is the value in hand addressing—oh—actual ink and paper based on writing direct mail to leads versus using a printer? Alright. I'm going to end with this question because this is a long answer unless I've got another question that's come in. I think I see one. Let me see. This is a long answer Scott and I promise that if I don't get to that answer I will answer it later for you via e-mail. I've got a live person I'm going to let come on the line. We're at 3:17. I am over. A bunch of people have dropped off but whoever is on the call still wants to hear this answer I'm going to go ahead and let you come on. So—hi, you are on with Richard James.

Valerie: Oh this is Valerie. This is Valerie. Am I still on?

Rich: Hey Valerie. How are you? I don't have a question.

Valerie: I didn't have my—I didn't have a question. I screwed up. I thought you had to press \*2 to talk and I was just going to thank you for answering my question. I don't have any new question. I just screwed up.

Rich: Alright. Good. Well Scott's going to be happy because I can answer his question. Did I answer your question adequately for you?

Valerie: Yes. Absolutely. Thank you.

Rich: Oh you're welcome. You have a Merry Christmas. Thanks for coming on the call today.

Valerie: You too.

Rich: Bye-bye. Alright. Let's go ahead and answer Scott's question. So his question is why hand address them? So to give you a frame of reference for this I talk a lot about using hand addressing envelopes. So in the firm that I built and even in our own firm here we'll use hand addressing of the envelopes when we send out direct mail pieces when possible. And the reason for that is—and so what does that mean?

That means we'll actually have a woman who sits at home and gets a task from her—or fulfillment list from Infusionsoft and literally hand writes out—her favorite pen is a felt-tip although she can't do it in places that rain because when it rains the felt-tip runs. But her favorite pen is a felt-tip and uses a live stamp on an envelope. Why would we go through that aggravation. She can only do so many. It's expensive. It's time consuming. When you look at the cost per envelope you can run anywhere from as little as maybe 10 cents an envelope and if you're using a professional service maybe as high as 50 cents an envelope to do this. And so why would you go about doing it? Well Scott, the answer is this.

The answer is your goal for sending direct mail is to get it opened. And in direct mail there is a theory that's called A pile mail, B pile mail and C pile mail. I believe it was discovered or originally brought up by the late Gary Halbert. I may be getting that wrong and if I am anybody's welcome to correct me. But the idea is that when you go to the mail box there are three different types of—there are three things that are going to happen. You're going to get mail that you are literally going to open on the way back from the mail box. These are pieces of mail that have a check in them like your IRS tax refund or your check from Grandma



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or a letter that's on a Hallmark greeting card. You can tell it was addressed by one of your friends or an invitation to a wedding or something. You're going to open that on the way back from the mail box.

The second type of mail is mail in what we call B pile mail. That's mail that goes into the second pile for you to get to later on. Those are the utility bills, the things that have to be filed away. The cell phone bill. Whatever it is. Those are C pile mail items—or B pile mail items.

C pile mail items are all the junk mail that you are literally going to open over the garbage can. You are going to put your foot on that little lid thing. At least in my house it has that little thing that you open the lid with your foot. And you are going to go through it and you're going to open up the value pack and as you go through the value pack you're going to throw them in the garbage as you look through them to see if there's any coupons you want for your favorite pizza place. And you're going to look at the post card real quick and if it's nothing that speaks to you you're going to throw it away immediately. And if it happens to be that you had an infestation of scorpions that week. It was a pest control company, you're going to call them. But if it wasn't something that caught your eye, you're probably not going to pay attention to it. That's C pile mail.

So the question is in answering the question—the answer to the question of why you hand write the envelope and use a real live stamp is because you want to get it into A pile mail. So you want nothing that shows any chance to show that it's metered or corporate in any way. Because you're a law firm you're liable to get to B pile mail that will get opened later on, but I want to get to A pile mail. And if I get an envelope from a law firm and it's hand addressed with a real live stamp it makes me think that somebody knows me there. And so that's the answer to the question. Use a live stamp and a handwritten font rather than a—not a font but an actual hand writing with actual pen as opposed to computer generated stuff because it will increase your open rate. And just like e-mail, if they don't open it, they can't read it. If they can't read it we can't get them to the next stage. And everything in business is mass. At least it is for me. And it's all about for every thousand pieces of mail I send, how many did I get to move to the next stage, whatever the goal was for that mail piece. And the way I maximize that is to make sure I get as many people as possible to read my mail.

Scott, I hope that answered your question.

Folks, this has been Richard James. I know I went long, 22 minutes to be exact. I hope you've enjoyed today's call. I hope that it's been a good Christmas gift for those who have never been able to attend before and you heard something that maybe you didn't hear before. I know I can do an awful lot of talking. Thanks to all the guests who called in. Thanks to those who submitted questions via e-mail. I wish everybody a very, very blessed and Merry Christmas. And I look forward to talking to you once again in January where we're going to help you build your law firm one system at a time. Thanks so much everybody. Have a great day.