Group Legal Services Association

Solo, Small Firm, and General Practice Section

2014 Annual Conference

May 1-3, 2014, Las Vegas, Nevada

Expand Your Practice with Group Legal Services

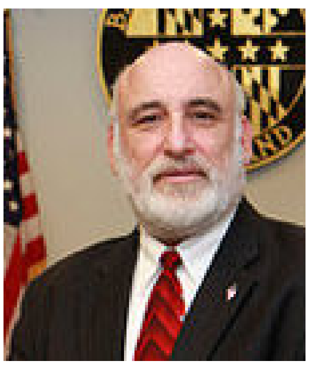
Saturday, May 3

9:40 am – 10:40 am

Presenters: **Rinky Parwani, Parwani Law PC**
Hon. Lawrence Stahl, Office of Administrative Hearings, Baltimore County

Rinky Parwani

Ms. Parwani has a solo practice in Tampa, Florida. She was the winner of the 2010 Brandon Small Business of the Year Award for Minority and Women Owned Businesses. She serves as the ABA General and Solo Small Firm Diversity Fellow. She is admitted to the bars in Florida, Texas, California and Iowa, as well as the US Supreme Court, Ninth Circuit, Eleventh Circuit and four US District Courts. She is a Fellow of the Life Management Institute, has her CMA from the Institute of Certified Management Accountants. She received her BS with double majors in Accounting and Corporate Finance from Drake University, her MBA from Drake and her JD from the University of Minnesota.



Hon. Lawrence Stahl

Lawrence Stahl received a BA from Queen's College of the City University of New York in 1971, and a Juris Doctor Degree from the University of Baltimore Law School in 1974. A former Assistant State's Attorney for Baltimore, he was an active practitioner for 37 years, during which he represented members of some 15 national and regional legal plans. In January 2011, he was appointed Administrative Law Judge of Baltimore County, Maryland.

Client Development in Legal Service Plans

I. Pre-Contact
   a. Initial Welcome Letter
      i. Sources
         1. Capitation Plans
         2. Assigned Attorney Plans
         3. Client Choice Plans
      ii. Structure
         1. Welcome and acknowledgement of membership
            a. Personalize by Plan "cookie cutter"
            b. Feeling special and "included"
         2. Communicating Value
            a. Importance of included "no cost" services, i.e.: telephone consultations, document reviews, client letters, simple wills
            b. Availability and listings of Plan specific benefit structure
         3. Attorney and firm description
            a. Smaller firms
               i. Personal touch experience
               ii. Plans by ability
            b. Larger firms
               i. Attorney by case type
            c. All firms
               i. Staff Availability
               ii. Years of Experience
               iii. Individual kudos
         4. Motivate to Action
            a. Specials
               1. Additional % discounts for limited time or type
               ii. Universal "check-up" appointments
            b. Wills, powers of attorney, advance directives
            c. Newsletters
               i. Description
               ii. Response event- client action
         5. Nuts and Bolts
            a. Location, directions

b. Website
c. Special facilities, i.e.: handicap, TDY, language skills, parking, public transportation

b. Newsletters
    i. Group use availability for obtainable Plan lists
    ii. Production
        1. In-house
        2. "Ready made"

II. Client Contact- Telephone

a. First Call/ All Plan Calls
    i. Pivotal Opportunity
        1. Positives – Do it right
            a. Allay Misgivings
                i. "What's the catch?"
                ii. "Too good to be true"
            b. Turn a passive member into an active member
        2. Negatives- Do it wrong
            a. Reinforces Initial Plan Misgivings
                i. "Am I a second-class client?"
                ii. "Is my case less important?"
            b. Discourages use and continued membership
    ii. Preparation
        1. Training staff
            a. Develop Plan telephone answering protocol
                i. Tigers, bears, and cowardly lions
            b. "Smile talk"
                i. Initial impressions are the impressions
            c. Identification of Plan
            d. Knowledge of Plan
            e. Obtaining necessary identification information
            f. Subject information for responding attorney
    iii. Call Types- objectives and characteristics
        1. Informational
        2. Response to letter or newsletter
        3. Task or event driven
    iv. Information Gathering Uses
        1. "Thank you" letters

        2. Action list
        3. Targeted Marketing

III. Event Marketing Opportunities

  a. Will- Planning appointments
    i. Don't waste it
        1. No fill out forms
        2. Person to person relationship
    ii. Tend the garden
        1. Building wider relationships
        2. Expand targeted document and task needs
    iii. Reinforcement of Plan benefits and services
        1. Post-appointment package
  b. Follow up task marketing
    1. Inform clients of coverage by plan for connected tasks
        1. Final divorce filings
        2. Judgment collections
        3. Review of later in time documents
  c. Non-covered referrals from Plan Members
    i. Non-covered family and friends
        1. "Middle ground" discount
            a. Value to new client
            b. Feeling of importance for Plan member
    ii. Non-covered company employees
        1. Providing services even at "middle ground" discount shows value
        2. Allows new relationship
        3. Provides source of "new" Plan member referrals
            a. Increases capitation where applicable
            b. Relationships positive with Plan

IV. Recapitulation

  a. Proper Plan Marketing
    i. New clients usage
    ii. Increased references
    iii. Increased out of Plan referrals expanding practice
    iv. Limited only by Firm activity
  b. Proper Training
    1. Staff Contact
    11. Attorney Contact
    i. Proper office protocol

ii. On-going communication of Plan benefit availability and capability

V. Using Technology to Your Advantage When Servicing Legal Plan Clients

a. Software

b. Voicemail

c. Scanning

d. Automating and Standard Content – pitfalls and strengths

e. Other tools