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Previously American Prepaid Legal Services Institute

Conference Session:

BUILDING A STRONGER RELATIONSHIP WITH YOUR PLANS

with

Mary Kate Zekert, Will Petersen

Barbara Baker, Jennifer McKeegan

and John Wachsmann

Thursday, April 16, 2015

11:45 AM to 12:45 PM

4/16: Building a Stronger Relationship with Your Plans

BUILDING A STRONGER RELATIONSHIP WITH YOUR PLANS with Mary Kate Zekert, Will Petersen, Barbara Baker, Jennifer McKeegan, and John Wachsmann

Date: Thursday, April 16, 2015
Time: 11:45 AM to 12:45 PM

SESSION DESCRIPTION:

Successful legal network and attorney provider partnerships benefit both groups when all partners are on the same page and support each other. Help is at hand! This informative session will share tips for how to most effectively work with legal plan networks. Highlights include: • Attorney Providers - understanding people are part of the plan. • Group Legal Administrators - how to deliver on expectations and be a stand-out provider. • Getting help – what to do when challenges arise. • Grow your practice - learn how a strong partnership with group administrators increases your client base.

ABOUT THE SPEAKERS:

Mary Kate Zekert is a general litigation attorney, practicing in Richmond, Virginia at Bowen Ten Cardani, P.C. She graduated from Virginia Tech, cum laude with a degree in Political Science. She graduated from the Robert Khayat School of Law at the University of Mississippi in December 2013. Her practice areas vary from family law in state court to Federal Appellate work for the CJA Fourth Circuit Appellate Panel. Mary Kate has been an ARAG attorney since June 2014 and her firm is also a network provider for HYATT.

Will Petersen assumed management responsibility of the Provider Relations team at ARAG North America in August 2009. Prior to that, Will spent more than seven years of service in the ARAG Customer Care Department, most recently as Supervisor. As the Provider Relations Manager, Will oversees the maintenance and retention of our Attorney Network. This includes development of educational opportunities, processes and new programs to help attorneys manage their ARAG business.

John Wachsmann is the principal at Wachsmann & Associates, PC. (1990-present) He maintains a full caseload and manages staff of six, including 3 attorneys. The offices do significant legal work as a provider attorney. He also worked at Hyatt Legal Services as a Staff Attorney and a Managing Attorney (1985-1990). Mr. Wachsman is currently a GLSA Board member active in the association's numerous committees.

Barbara Baker joined Hyatt four years ago after practicing law in both the private and public sectors. As Assistant Counsel, she assists with the day-to-day administration of Hyatt's network of over 6,500 law firms that provide daily service to Hyatt's members, and also provides additional assistance to the Panel Management Department and Hyatt's General Counsel. She received her B.A. in History and Political Science from Capital University in Columbus, Ohio is a graduate of the Northwestern University School of Law.

Jennifer McKeegan is currently an Assistant Counsel with Hyatt Legal Plans, Inc. In this role, Jennifer assists with the day-to-day administration of Hyatt's network of over 6,500 law firms that provide daily services to Hyatt's members, and also provides additional assistance to the Panel Management Department and Hyatt's General Counsel. She holds a B.A. in Government and Politics from the University of Maryland at College Park and received her J.D. from the Cleveland-Marshall College of Law at Cleveland State University.

Build a Stronger Relationship with Your Plans – Will Petersen @ ARAG

WORKING WITH MEMBER

- Plan Administrators find that communication is the biggest point of breakdown in service delivery by between the 3 parties in play: Plan Administrator, Network Attorney & Member

  - Communication with Member:
    - Return voice messages within 48 hours and confirm preferred contact method between parties
    - Set realistic expectations up front with the members and provide ongoing status updates
    - QUICK TIP – A good way to let a client down in day-to-day is "Don't want to take on this level of case for the fees"….means something VERY different for members
  - <u>Service Basics when working with the member</u>
    - Gather information early from the member such as name, ID number, or situation specific number based on which administrator you're working with
    - Make sure to review all information related to coverage and contact Customer Care should modification need to be made
    - Even with flat fees, it's a good idea to keep an itemized bill for all legal matters – it can help when tracking or additional fee requests might be needed

  - <u>Professionalism when dealing with the Members – **These are the complaints we hear more often than you'd believe!!!**</u>
    - Be polite and listen to the member's concerns – In some cases members are worried they could be treated differently because they are with a plan, so, keep that in mind
    - Have available an appropriate outgoing voice message – plan members have choice and they'll move on quickly if they don't feel they are reaching the appropriate parties

WORKING WITH PLAN ADMINISTRATORS

  - With your Plan Administrator:
    - Keep it behind closed doors ….Contact Provider Relations for any questions about the Fee Schedule, Attorney Agreement (insert link), working with plan members, or navigating the website
    - Maintain current contact information, areas of law, and profile status – In this new age of online everything, if this doesn't match for a plan member when they try to call you….they lose faith and belief in who you are

- <u>Working with your Plan Administrator</u>
  - Complete your recertification on an annual basis and let us know of any changes needed

    - Be familiar with the Fee Schedule and Attorney Agreement

- Phone, email or via the website – always lean on us first as the member perceives us to be working together directly…once that perception is damaged, it's very hard to repair. Help us help you!

ABOUT THE AUTHOR:

Will Petersen has held the role of Provider Relations Manager since August 2009. Prior to that, Will spent more than seven years in the ARAG Customer Care Department, most recently as Supervisor. As the Provider Relations Manager, Will oversees the maintenance and retention of our Attorney Network. This includes development of educational opportunities, processes and new programs to help attorneys manage their ARAG business.

Building a Stronger Relationship - Mary Kate Zekert

I. Introduction

a. Firm overview

i. New attorney

ii. 6 attorneys, 13 employee with staff

iii. Types of law

b. Importance book of business

i. Network attorney

ii. Competition

iii. Client choice

II. Types of cases I receive and how compensated

a. Estate Planning, Divorce, Defending against collections

i. Flat Fee

b. Wrongful Death

i. How this case came to be

ii. Compensation

iii. Mentoring

c. Pros and Cons

III. Differences in legal plans

a. Repayment differences

b. Client responsibilities

c. Firm member vs. attorney member

IV. Benefits of being a Network Attorney

a. Gaining clients

b. Diverse practice areas

c. Word of Mouth referrals down the road

d. Internal referrals to attorneys within the firm for other matters

V. Advice to Attorneys

a. Manage expectations

b. Don’t let your client think of you as the “free lawyer”

c. Young attorneys – be sure to have adequate mentors in place