

2017 JOINT SPRING MEETING

**GROUP LEGAL SERVICES ASSOCIATION
SOLO, SMALL FIRM, AND GENERAL PRACTICE DIVISION
STANDING COMMITTEE ON GROUP & PREPAID LEGAL SERVICES
MAY 18-20, 2017
SCOTTSDALE, ARIZONA**

HOW TO BE A SUCCESSFUL LEGAL PLAN PROVIDER ATTORNEY

**FRIDAY, MAY 19, 2017
8:00 - 9:00**

**PRESENTERS: RIYAD BACCHUS (MODERATOR)
FLORENCE BRUEMMER
BEN FARROW
RUSSELL WENK**



Riyad Bacchus
Director – Legal Assistance Division
Sykes Assistance Service Corporation

Riyad Bacchus was called to the bar on February 15, 2000 and started working, with Sykes Assistance Services, later that month. Mr. Bacchus has been an advice lawyer, a new business development manager and currently manages the Legal Assistance Division.

Apart from Sykes Assistance Services, Mr. Bacchus teaches in the Paralegal Program at Westervelt College, serves on Legal Aid Ontario's Civil Advice Lawyer Panel and participates in the Civil Litigation Working Group that develops questions for the lawyer licensing exam. Mr. Bacchus is also a member of the Fund Development committee for The Sunshine Foundation.



Florence Bruemmer
Law Office of Florence Bruemmer
Anthem, AZ

Florence M. Bruemmer is a licensed attorney in the following jurisdictions: State of Arizona, United States District Court of Arizona, Ninth Circuit Court of Appeals and Supreme Court of the United States. Florence practices in the following areas: Real Estate and Business Transactions, Civil and Business Litigation, Estate Planning, Family Law, and Appellate Law. Florence's Appellate work has brought her to Stanford Law School to argue a case before the Court of Appeals for the Ninth Circuit. Florence is a current attorney on the ARAG roster in the State of Arizona.

Florence's office is located in Anthem, Arizona. She has an associate attorney, Tanya Hill, who has been with the firm for over 10 years. Florence's office has been located in Anthem since 2001.

Florence received her Juris Doctorate degree from Loyola University Chicago in 1999. Florence is a member of the State Bar of Arizona and AWLA. Florence has served the community by volunteering for The Courthouse Experience, AWLA Mentor Program, VLP, Lawyers in the Classroom, MCBA Law Fair, Maricopa County Superior Court, and We the People...Project Citizen. Florence was voted Lawyer of the Month December 2003 by the Maricopa County Bar Association.



Benjamin Farrow
The Anderson Law Firm
Montgomery, AL

Benjamin Farrow was born in Uvalde, Texas and raised in Idaho, Colorado and Louisiana. He graduated from Tulane University in 1988 and Louisiana State University Law School in 1992. He started practicing as an admiralty lawyer in New Orleans doing work for Lloyds of London and other international insurers, ship owners and suppliers. While he enjoyed that work and was paid handsomely he eventually became a coverage attorney for an insurance carrier. His wife took a job as a Russian History professor at Auburn University Montgomery and he was forced to relocate in 1999. Passing the Alabama State bar exam in 2000 he began practicing at another insurance defense firm. That work was financially rewarding but emotionally and intellectually draining. In 2002 he accepted employment with The Anderson law Firm and was made a partner in 2006. The Anderson Law Firm's largest client is LegalShield and while the work has been financially rewarding it has also fulfilled his requirement that the work be challenging and intellectually interesting. All three requirements have been met beyond his wildest dreams. Ben enjoys working with his brother and sister firms across the country and has made many friends that will remain so for life. In 2016 he was admitted to the Mississippi bar and the firm opened its Jackson, Mississippi office in September 2016. He regularly travels between Montgomery and Jackson and oversees the work of both offices. The challenges of practicing in three states and keeping clients happy is something he enjoys every day, some more than others. He enjoys zymurgy, probability and skiing in his time off.

How to Be a Successful Legal Plan Provider:

Russell F. Wenk
Lincoln & Wenk, PLLC
1616 North Litchfield Road, #140
Goodyear, AZ 85340
623-536-5500

Introduction:

Stats – 3 attorneys, 4 paralegals, 2 legal assistants, accounting, and receptionist

2016 – 288 clients with some form of legal plan.

Keys to our success = People and Process

People = My people/staff – Know and understand what Legal Plan providers are.

Attorneys' role

Process

-Potential Client Calls In

We ask, "How did you hear about us?" If the answer is a legal plan, we collect their case numbers and member id's, along with all their other info for consultation.

-After phone call

-We verify coverage for the member by calling the legal plan or going online. (we know that the clients could get it to, but we feel like this is part of our commitment to do this on their behalf.)

-Before they come in, we put together an intake packet that includes print outs of their legal plan coverage, so that it is clear to the client and the attorney.

Prior to IC - (with client approval)

Sent an email with map and directions to office.

Call to confirm appointment.

-At and After IC

- At IC discuss coverage under legal plan.

-After we meet with them, if they want to retain us, we have specific RA's that are just for the legal plan members. For example, there are full coverage, partial coverage, discounted rates, etc....

-If they don't retain us, we enter the IC time into our software under a specific matter number, that is tied to IC's for that legal plan.

-Once they retain us, we have specific matter numbers in our software that designate them as Hyatt or ARAG clients, so that we can track them for marketing and billing more efficiently.

-We also enter their case numbers and member id's saved to our accounting software for billing.

-When case is active

-We treat all our clients well, regardless of whether they are on a legal plan or not.

-We have weekly meetings with the paralegals

-We send status reports to the clients

-We call and email them promptly

-Billing

-We have one person that does all the billing for our legal plans. This ensures that it is done correctly and consistently.

-We bill the legal plans at least once a week for any clients we see for consultations only.

-If it is a partial coverage plan client, we calendar to check their time each week, this is usually done every Monday until the case is completed.

-For clients that retain us, our billing person is calendared on every court date. That ensures that she knows when to ask the attorneys, if the case is completed and can we bill the legal plan at that time or not.

-When case is completed

-We send them a letter thanking them and ask them to review us.

-Other important facts

-We have some legal plans, where we have a person that is dedicated to our firm for day to day questions. This works really well for both sides.

Relationships:

With both providers and clients.

-Company wide coverage for employees. They talk to each other. No better referral source than previous client.

-Very often, someone will retain us for something and a year or two later, will come back and retain us for something else.

-Of course, we have a lot of self-pay clients through the legal plans, where maybe just their IC is covered. We still put them under the designated matter ID, so that for marketing purposes, we can track where they came from.

- Make it easy for the client.

Don't forget that we provide a service. No product.



ARAG Network Attorney Website

Home Claims Center Resources Working With ARAG My Profile

Home

Florence Bruemmer
Attorney ID: 940873802303

About ARAG

Provider Relations Team

Ask ARAG

Call us toll-free at
866-272-4529

Submit Question

About ARAG

An International Family-Owned Enterprise



Our History Global Expansion The Story Behind Our Name The Story Behind (

ARAG was founded more than 75 years ago by Heinrich Faßbender, an attorney and entr Germany. He believed everyone should be able to assert their legal rights and created an the means to obtain justice, regardless of financial status. ARAG began as legal protectio to offer legal protection for all situations in life. After three generations, the company is sti founding family.

In 1989, ARAG purchased a division of Midwest Mutual Insurance Company and expande where it provides legal solutions to consumers throughout the United States.

ARAG is a global provider of legal solutions focused on:

- Education and Empowerment
- Planning and Prevention
- Resolution and Protection



ARAG® Network Attorney Website

Home Claims Center Resources Working With ARAG My Profile

Home Working with ARAG Getting Started

Florence Bruemmer
Attorney ID: 940873802303

Working With ARAG

Getting Started

Attorney Agreement

Working with Members

Filing Claims and
Getting Paid

Refer a Friend

Insurance

Business Tips

FAQ

Ask ARAG

Call us toll-free at
866-272-4529

Submit Question

Getting Started with ARAG

Everything You Need to Know to Build Your ARAG Business



Get Started Today

Some important steps to building your ARAG® business include setting up your attorney payment and letting people know you are a Network Attorney. We've addressed all this information provided below.

Welcome to the ARAG Family

Use Your ARAG Resources

Award Winning Customer Care Center

Our award-winning Customer Care Specialists are managed and operated out of our North in Des Moines, Iowa. This helps us closely monitor the quality of our training and service in a row, Customer Care has earned certification as a Center of Excellence from Benchmark center benchmarking organization. According to BenchmarkPortal, which has a database participating companies, only 5-7 percent of the companies that apply and undergo a rigorous achieve the overall performance results required for certification. An even smaller percent the award for consecutive years.

To contact a Care Specialist (regarding claim issues, member verification, etc):

Call toll-free 866-272-4529 option 2

Email Service@ARAGlegal.com

Provider Relations Team

The ARAG Provider Relations Team is led by attorneys and dedicated to providing ongoing support that will help you increase client referrals and stay on top of managing your ARAG Specialists is available via phone or e-mail to answer your questions and listen to your feedback.

The ARAG Provider Relations Management Team has many years of experience in building relationships and developing a world class customer service department. Our team is focused

relationships, exploring process improvements and providing value-added opportunities for the ARAG Attorney Network.

ARAG Provider Relations Recruitment Team primarily focuses their experience and expertise in the ARAG Attorney Network through targeted campaigns to promote awareness and interest in the ARAG Attorney Network.

To contact a Provider Relations Specialist:

Call toll-free 866-272-4529 option 4

Email Attorneys@ARAGlegal.com

[Review Your Profile](#)

[Add ARAG to Your Approved Senders List](#)

[Tell Us How You Want to be Paid](#)

[ARAG Marketing Center](#)



ARAG Network Attorney Website

Home Claims Center Resources Working With ARAG My Profile

Home Claims Center

Florence Bruemmer
Attorney ID: 940873802303

- Claims Center
- CaseAssist
- Claim/Payment History
- Plan Member Status
- Fee Schedule
- Paper Claim Forms
- FAQ

File Claims Faster



CaseAssist Search

Enter Confirmation Number

e.g., 123456-001

Search

CaseAssist

Save some green. Reduce money and resources by submitting claim online.

CaseAssist

Claim/Payment Hist

Check your claim status, additional documentation correspondence related t

Profile Progress

50% Complete

Boost Your Profile

Plan Member Status

It's important to know who's covered and who's not. Verify your ARAG client's member status before you provide service to them.

Plan Member Status

FAQ

We've addressed your m can't find it here, contact Care Specialists.

Your Member Satisfaction Rating

See how you rate and what members have to say.

View your rating

Fee Schedules

Review the ARAG Fee Schedule.

Fee Schedules

Paper Claim Forms

Download paper claims h

Ask ARAG

Call us toll-free at 866-272-4529

Submit Question

Get Paid Faster

Receive safe and secure

claim payments through
direct deposit

[Register Now](#)

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[Home](#) | [Claims Center](#) | [Resc](#)

HOW TO BE A SUCCESSFUL LEAD PLAN PROVIDER

Ben Farrow

Anderson Law Firm

LegalShield Provider Law Firm – Alabama & Mississippi

What is LegalShield?



- LegalShield is a privately held company with offices/corporate headquarters in Ada, Oklahoma and offices in Richardson, Texas, and New York, New York that offers pre-paid legal plans to individuals and businesses.
- LegalShield maintains additional call centers in Antlers and Duncan, Oklahoma.
- Their customers are referred to as members.
- LegalShield has been in business for 45 years and protects and empowers more than 4.1 million lives in 50 states and 4 Canadian provinces.
- LegalShield is not a law firm. It contracts with law firms to provide the legal services to its members.

What Plans Does LegalShield Offer?

- A legal plan for families and individuals.
- Legal plans for businesses up to 100 employees that cover business matters.



What Do the Family Plans Cover?

For a set monthly fee, the legal plan for families and individuals provide:

- telephonic consultation
- document review
- traffic ticket defense
- some civil and criminal trial defense
- IRS audit assistance
- wills and
- discounted fees on other legal services.

Some plans offer uncontested services for domestic and family law matters and residential loan services



What Do the Business Plans Cover?



LEGAL PLANS FOR SMALL BUSINESS

- The legal plan for business provides telephone consultation, document review and civil trial defense, but also offer collection letters at no additional charge. Other business-related services are offered at discounted fees.

How Does LegalShield Deliver the Legal Services?

- LegalShield contracts with one law firm in each state (two in Florida) to deliver all the legal services required by its members in that state, or to refer matters to other selected lawyers.
- This law firm is referred to as the Provider Firm and lawyers to whom matters are referred are called Referral Attorneys.
- In certain circumstances, LegalShield or its Provider Firms may rely on a wider network of plan attorneys, called the referral network. This is a group of more than 4,000 attorneys nationwide who work directly with members.

What Is a Provider Law Firm?

- The Provider Firm handles all initial contact and consultation with the member and determines whether or not the member needs services beyond what can be provided through telephonic consultation.
- If the member needs additional services, then the Provider Firm decides whether to offer a referral to a lawyer within the Provider Firm or to a Referral Attorney.
- The Provider Firm is ultimately responsible to LegalShield for the customer service given to the members both by it and by Referral Attorneys.

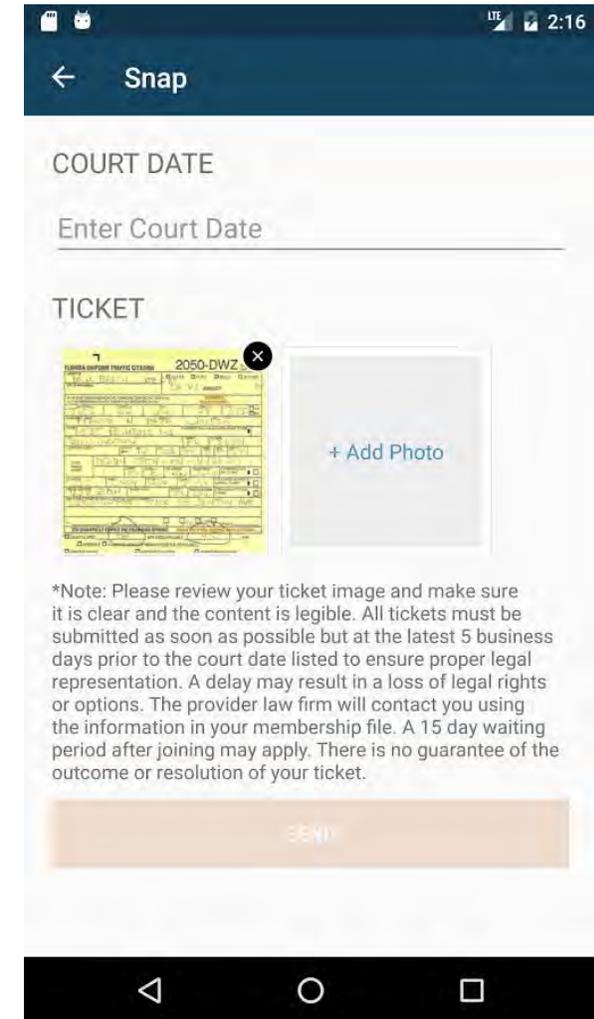
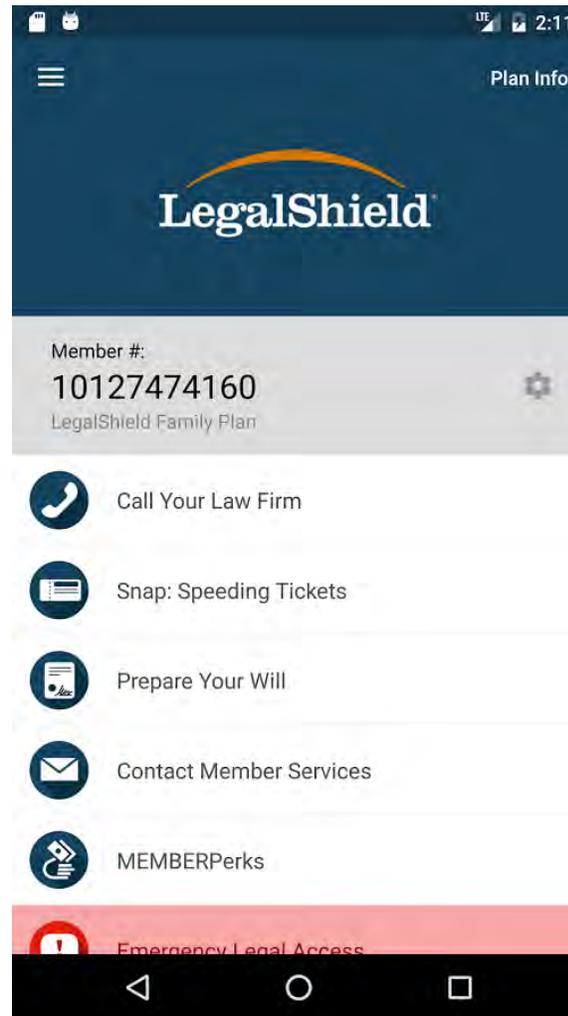


LegalShield's Mobile App



The LegalShield app puts the Provider Law Firm in the palm of the member's hand.

- Need legal help? Tap to call the provider law firm.
- Speeding ticket? Use “Snap” to send it straight to your law firm.
- Legal emergency? Tap the red button for 24/7 assistance for covered legal emergencies.
- Download the Will Questionnaire.
- See basic plan information.



LegalShield's Customer Service Methodology

- LegalShield's Member Bill of Rights
- Provider Law Firm Service Standards
- Membership Experience Surveys
- Net Promoter Score
- INSIGHT
- Monthly Report Cards
- Annual Training/Award Ceremony
- ELEVATE



“Someone calling themselves a customer says they want something called service.”

LegalShield's Member Bill of Rights / Provider Law Firm Service Standards

- A lawyer will call back within 8 Business Hours or the staff will offer a phone appointment when needed.
- An urgent matter will be transferred directly to a lawyer or the lawyer will call the member back within 1 Business Hour or will offer a phone appointment when needed.
- 24/7 emergency access to a LegalShield attorney through a dedicated phone line is available when a member encounters a covered emergency situation.
- A lawyer will review a document within 3 Business Days.
- A letter will be completed within 3 Business Days
- A referral to a lawyer outside the Provider Law Firm will be made within 3 Business Days

Membership Experience Surveys/Net Promoter Score

- Each member that contacts the Provider Law Firm is asked to rate the experience using the Net Promoter Score metric.
- Subtracting the percentage of Detractors from the percentage of Promoters yields the Net Promoter Score, which can range from a low of -100 (if every customer is a Detractor) to a high of 100 (if every customer is a Promoter).
- The Provider Law Firm average is 60!



Detractors	Passives	Promoters	NPS
100	0	0	-100%
50	50	0	-50%
30	40	30	0%
0	50	50	+50%
0	0	100	+100%

INSIGHT

- If LegalShield, the Provider Law Firm attorney and/or Referral Attorney scores less than a 7, the member will be asked additional questions related to:
 - Explanation
 - Listening
 - Politeness
 - Timely and Frequent Communication
 - Knowledge
 - Timeliness
- Those responses are then used to focus training, on an individual level, for the attorney.

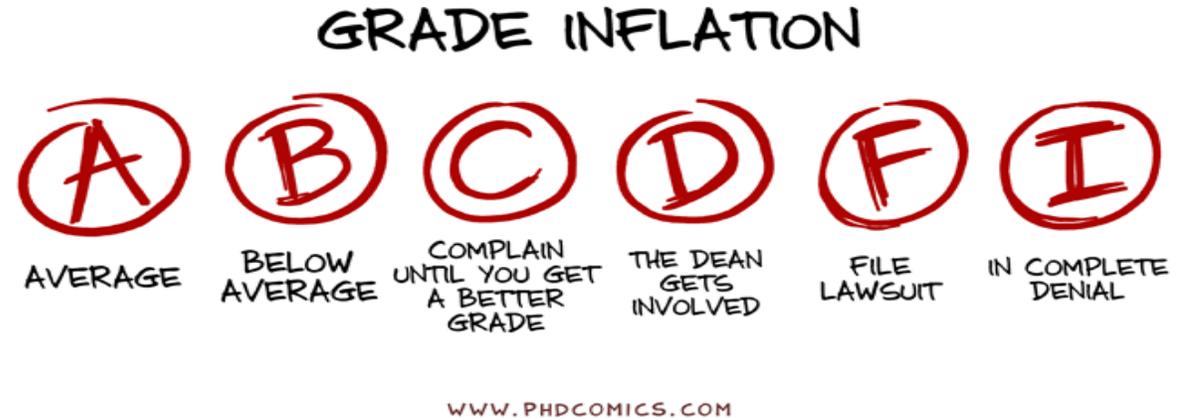


Training is a process, not an event.

Monthly Report Cards

Each provider Law Firm is graded from “Excellent” to “Poor” by LegalShield each month on 12 separate service standard metrics such as:

- Did everyone get a call today?
- Have all referrals been completed in a timely manner?
- Have all requested documents been received from the member? If not, has the member been advised?
- Have all requests for a Last Will and Testament, Advance Medical Care Directive and Power of Attorney been timely completed?
- Have all member resolution files been resolved and/or responded to?
- Has the call center handled all calls offered?
- Have all “Mystery Shopper” calls been handled appropriately?



Annual Training/Award Ceremony

- Provider Law Firms meet at least twice a year for training and celebrating
- LegalShield honors its Provider Law Firms:
 - Difference Maker (largest financial impact at no additional cost)
 - Outstanding Service (consistently meeting service standards)
 - Member's Choice (highest NPS and member survey scores)
 - Award of Excellence (overall excellence)
- And Individual attorneys and staff:
 - Consultation Attorney with the highest NPS score
 - Emergency Access Attorney with the highest NPS
 - Firm Administrator of the Year
 - Supervising Attorney of the Year
 - Referral Attorney of the Year



ELEVATE

- This event is LegalShield's conference for attorneys that provides:
 - Networking with lawyers from all over North America
 - Special Speakers
 - Continuing Legal Education
 - Vendor Tech Show
 - and More!
- San Diego, CA (July 6-8, 2017)
- Manchester Grand Hyatt



How can you get in the referral network?

- Complete the GLSA Universal Application

Group Legal Services Association

321 N. Clark Street, 19th Floor

Chicago, IL 60654-4740

(312) 988-5751

- Contact LegalShield

LegalShield

One Pre-Paid Way

Ada, OK 74820

(580) 436-1234

- Contact the provider law firm in your state





How to Be a Successful Legal Plan Attorney

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How to Be a Successful Legal Plan Attorney

Introductions:

- **Riyad Bacchus**, Sykes Assistance – *A legal plan provider*
- **Ben Farrow**, Anderson Law Firm – *A legal plan provider for Legal Shield*
- **Florence Bruemmer**, Attorney – *A panel lawyer for several legal plans*
- **Russel Wenk**, Attorney – *A panel lawyer for several legal plans*



How to Be a Successful Legal Plan Attorney

Don't Forget the Simple Things

- Be responsive – initial contact should be within the agreed upon service levels
- Speak to the issue with confidence:
 - Reference how long you have been an attorney or a panel attorney
 - Understand the client's request (review the file)
 - Understand the legal plan and what it covers
 - Set reasonable expectations that you exceed



How to Be a Successful Legal Plan Attorney

Suggestions from the Legal Plans



- Members of the legal plan should feel special.
- If the plan member feels special, you will likely receive high client satisfactions scores which translates into more work.
- Make suggestions to the legal plan.



How to Be a Successful Legal Plan Attorney

Comments About the Process



- Customer satisfaction is tracked by the State Provider Firm and Legal Shield.
- At Legal Shield, referrals are made based upon geographic location, legal expertise and customer satisfaction scores.
- To reiterate: set reasonable expectations.
- Red flags: calls are not being returned, appointments are not being set, complaints about rates, etc.



How to Be a Successful Legal Plan Attorney

Suggestions from Experienced Attorneys

- Technology: Good phone and email providers, tablets, software
- Use the legal plan websites and the staff at the legal plan.
- Have a system for managing calls.
- Use time management solutions to deal with the extra calls, appointments, court hearings and office work.
- Be consistent in your billing practices.



How to Be a Successful Legal Plan Attorney

Suggestions from Experienced Attorneys



- Be kind. Be sympathetic.
- Treat each client as a referral source.
- Educate clients that your office is not a legal hotline for them to call 24/7.
- Educate clients that you do not work for the legal plan, but are an attorney on the legal plan.
- Try to know as much as you can about the legal plan, but refer back to the legal plan for additional referrals or additional benefit information.
- Do closing letters.

