Why Read This Book?

Here is what a few attorneys and business leaders have said about *IntakeAcademy.com* and Chris's program:

Stephen K. Brooks, Attorney
Brooks Law Group, P.A. www.BrooksLawGroup.com

I met Chris through Ken Hardison and Pilmma. Chris has done an amazing job in transforming my intake department. We were disorganized, sterile, and sometimes rude with very little training or guidance. We just "assumed" they were doing intakes right, but we weren't checking to make sure.

Chris helped turn my intake department into an energetic, proactive, closing-the-deal, script-following machine. Our retention of new clients is much higher. We realized that we spent a lot of time, effort, and money to get the PNC to contact us, but in many cases, we were dropping the ball during the intake process. Now we don't because we constantly monitor and train. The intake department is like a Ferrari… it needs lots of maintenance. But, a finely tuned machine will produce fantastic results.

William V. Steffens, Attorney
Steffens Law Office, P.C. www.SteffensLaw.com

Chris, I have some great news for you. As you know, we're on top of our numbers; we know everything there is to know about our numbers.

Chris, we recently wrapped up our month with 76 percent conversion. Chris, that's 26 percent higher new client conversion, closed. This is the first time we've had that high of a conversion.

We, without a doubt, attribute your program to this success. I'm excited and the team is excited. Thank you.

Steven Schwartzapfel, Attorney
Schwartzapfel Lawyers P.C. www.fightingforyou.com

We have a law firm in New York and have approximately 70 people in our firm, including attorneys and support staff. I can tell you, no matter how good you believe your intake process and procedures are, they can always be better. You would be surprised to hear and listen to your calls and the feedback and coaching the Intake Academy provides. Chris Mullins is the expert at evaluating your calls to help you get more from the marketing on which you’re already spending. I highly recommend the Intake Academy. I recommend you retain their services, not just once, but on an ongoing monthly basis because repetition matters. If you really care to capture the maximum amount of clients, use their sales conversion service. It is an excellent investment.

The script consult was very helpful. KISS, the intake specialists have to master the basics. You refined the process to the essence of what must be accomplished at the minimum. The staff will now better understand how they will be graded and we simplified the process some. It was very beneficial.

Tom Foster, CEO
Foster Web Marketing www.fosterwebmarketing.com

Chris Mullins is great at getting a team together and calling businesses, law firms, etc. to check on their phone answering conversion, email, and contact form responding so that business owners can improve their intake process and increase conversions. "Inspect what you Expect™" – this sums up what Chris Mullins does very nicely, and she does it well. I personally have worked with Chris Mullins and her team to provide "secret shopper" services for one of our most successful law firms. We provide marketing consultation and services for law firms and called on Chris to help us evaluate the search patterns of visitors to our client's website. We also asked her to provide detailed reporting on usability and the user experience, so we could make improvements to conversion and lead generation. It was not an easy campaign to implement, but we did it, and Chris and her team provided more than I had asked with fantastic, detailed reporting. We ended up implementing much of what was learned from these reports, which increased conversion substantially. The client was thrilled and ended up hiring Chris to support them even more, resulting in a happy ending for everyone. I recommend Chris Mullins and her team more for services. Chris provides a great product and is very easy and fun to work with. She met all our deadlines and, as I said, went further than was expected. I could not be happier.

Benjamin W. Glass, Attorney
www.GreatLegalMarketing.com

I recently hired Chris Mullins and team to ghost call my own law firm, just to make sure my phones were actually being answered the way I thought they should be answered. The process of working with Chris to get the calls done was painless… the follow up call with Chris where we "dissected" the calls was somewhat painful. Turns out, we had more training to do. Chris Mullins to the rescue. Her system makes it easy for any lawyer to easily get their staff not only trained once to convert more but reinforced on that training frequently. I highly recommend Chris and her team.

Jeff Witten, Attorney
McComb Witten Marcoux, Personal Injury Lawyers www.mccombwitten.com

Lawyers often confuse their professional skills with the skills they need to connect with potential new clients. Chris Mullins Lawyer's Boot Camp helped our lawyers understand the difference. Chris took our legal team on a deep dive into the mindset necessary to convert leads into clients. And gave them the tools to do exactly that. There's no doubt in my mind that Chris Mullins Lawyer's Boot Camp was a wise investment on our part. I'm all about ROI and Chris Mullins delivers.

Dan Kennedy
www.DanKennedy.com

Chris Mullins and team expertly and ably attack a very significant problem area costing almost every law firm and all businesses large sums: the handling of inbound and outbound telephone calls. Attorneys, business owners, and corporations spend huge amounts of money making the phone ring, and then invest little or no serious effort at ensuring each type of call is handled properly and professionally. I have urged clients of mine to utilize Chris Mullins, her programs, and her team to work on this and have seen the profitable results.

Brian Ricci, Attorney
Ricci Law Firm www.riccilawnc.com

Chris, I'm not the type of person who would have ever bought into intake training and those types of things. With that being said, I thought it was phenomenal in so many ways and wish we would have done this a year ago when we really started growing. The Intake Sales Conversion Team Kick-Off was awesome and made complete sense. I really believe the staff understood the bigger picture. It was also good to have everyone learn more about each other during the Kick-Off training. It takes a lot to impress me, and I can tell you, I am very, very impressed with your program. I really look forward to our relationship growing into the future. By the way, had to call into the office three times on Friday, and each time I got, "Welcome to Ricci Law Firm"!

Scott Monge, Attorney
Accident and Disability Attorneys of Monge & Associates www.mongeandassociates.com

Chris, thank you for a great class today. I especially liked how you focused on gratitude and empathy. I like how you reminded everyone in a straightforward manner that they should view calls with gratitude because the phone ringing is the reason they have a job while at same time talking about importance of being empathic, caring and concerned to callers. Also, great quote about gazelle and lion really ended things on a high note. Appreciate your sharing your high voltage, positive, bottom-line energy with class. You set just the right tone and did great job of reminding folks of need to differentiate!

John Fisher, Attorney
www.protectingpatientrights.com

In personal injury law, the intake specialist is crucial to my success. But when I was faced with the challenging task of starting my new law practice, I was tempted to take the easy way out by hiring a receptionist who was reliable and would show up on time but didn't have the key qualities of compassion and understanding that are key for this position and conversion. Fortunately, I was lucky to speak with Chris Mullins before I made the mistake of hiring the person who wasn't quite right for the position. Chris Mullins helped me find the right receptionist for my law practice, and Chris and team scheduled repeated follow-up phone calls with me to make sure I didn't take the easy way out. Chris showed a real concern that I follow the right processes in hiring a receptionist, and I now feel that I am on the right track to making a good hire. This is the first step in building your law practice. I could not be more appreciative for the time with Chris to help me find the right person for my case intake specialist. If you need advice hiring the right person for your phone calls and conversion, you could not do better than Chris Mullins, The Phone Sales Doctor at the Intake Academy.

Pat Misek
Law Office of Sharon Christie
www.SharonChrisitieLaw.com

Chris, many thanks for being student of the month. I do so appreciate this recognition, and Sharon is quite pleased with me and your program. We have both learned and attained new telephone sales conversion skills. Congratulations to you on climbing the mountain, what a thrill. It gives me encouragement to get out and at least walk around the block!

IntakeAcademy.com

Great Marketing Is Not Enough When Your Prospects Don’t Convert!™

By Chris Mullins

The Phone Sales Doctor™

Law Firm Conversions™

Great Marketing Is Not Enough When Your Prospects Don't Convert!™

Published by Mullins Media Group Publishing™
6-A Cheney Ave.
Peterborough, NH 03458

Printed in the United States of America.

ISBN: 978-0-9963600-1-2

Cover design by Jim Saurbaugh, JS Graphic Design

Table of Contents

The Phone's Ringing, But….

Let's be clear about two things right off the bat.

First, you never get a second chance to make a good first impression, and second, despite the years you've spent in college and law school, you are actually running a business. You may think you're an attorney or a managing partner running a firm, but you are also very clearly, and without a doubt, an entrepreneur running a business. And yes, first impressions really do matter.

Some psychologists estimate that someone will form a first impression in three to four seconds. Further complicating first impressions is that they are difficult, even impossible, to reverse. You probably already know that, so you dress impeccably every day, consistently speak with eloquence, and handle yourself with the utmost professionalism with every client or prospect; however, none of those factors may have an impact on the first impression you make. Why? ***You*** may not be the one making the first impression.

Your phone is ringing, but you're not the one answering it.

Your phone is ringing, but the prospects who are calling your office are not scheduling appointments.

Your phone is ringing, but those calling are not converting to become clients.

Your phone is ringing, but existing clients are not scheduling second or third appointments when their need for legal advice or representation arises again.

Your phone is ringing, but ultimately you have a problem.

Since Bates v. State Bar of Arizona in 1977, the court upheld lawyers' right to advertise, upsetting a long tradition against advertising by lawyers and no longer deeming it an untoward breach of etiquette but actually a matter of First Amendment-protected speech. With that, the marketing doors opened to the legal profession to use various ethical means to attract prospects.

Today, you can promote your firm using many of the marketing strategies that other industries capitalize on to grow their businesses. There are television and radio commercials, print advertisements (delivered via newspapers or direct mail), and telephone directories – all that need to be designed and produced, all that can be very expensive. You have a website and now use online advertising and social media, and that digital advertising arena takes a ton of time to keep it current and fresh and to be responsive. Maybe you've learned about the huge time investment digital marketing requires the hard way, having invested your own precious time. Maybe you've hired someone in-house to handle your digital marketing or outsourced it to an advertising agency or specialized firm. Either way, it's expensive.

Marketing takes money. Industry estimates show that the average spent by a firm on marketing is about two percent of gross receipts. It's expensive. Spending a half million dollars in a year in a medium-sized television market is not unthinkable. Perhaps you aren't spending that much (or maybe you are), but whatever you are spending is money on which you'll want to see a profitable return.

So now your phone is ringing, but… ***you're still struggling and prospects are not converting!*** Your case load isn't where you want it to be. The money you're investing in marketing isn't reaching the bottom line on your balance sheet. You start to wonder if the investment in marketing is really worthwhile. You're ready to pull the plug, no matter how much you spend. Don't. Why? Your phone ***is*** ringing.

The goal of marketing isn't to boost your bottom line. The goal of marketing isn't to directly increase your case load. The goal of marketing is to bring people to your door or to call you. The purpose of any marketing strategy and the subsequent tactics used to implement that strategy is to get the phone to ring. That's all.

Your problem isn't getting the phone to ring. It's ringing, so your marketing efforts are working. Marketing isn't your problem. The problem is what happens the moment the phone is answered.

First Impressions

Back to those first impressions: It all hinges on the person answering your phone and the employee greeting the prospect or client walking into your office. They may or may not be one and the same. What first impression are your prospects getting when their call is answered? That impression makes or breaks the relationship and the conversion from prospect to client. That first impression creates the return on investment of your hard-earned marketing dollars. That first impression is what will increase your case load, but not by simply getting more cases… but by getting more cases that make sense for your firm. That first impression can impact the cost of case acquisition. That first impression ultimately increases your bottom line.

That first impression transcends “important.” It’s critical.

But here’s the rub: There are far too many managing partners, owners, or attorneys who may agree with the importance of first impressions but truly fail to “put their money where their mouth is.” They place the least amount of the firm’s resources with the position that is as critical to overall success as the lawyers.

How can I make such a brash statement? It’s quite simple. If the prospect in need of legal advice or representation never actually speaks to the lawyer, it doesn’t really matter how good the lawyer may be or how many cases they’ve won or settlement amounts they’ve generated. The prospect opts out based on the first impression they get when their call is answered. Granted, a few may overlook a poor initial contact if they’ve received a glowing referral, but why take that chance? I’m willing to bet the initial contact is a chokepoint for your firm, and it’s time to change that!

Beyond Theory

If you’re guilty of placing the least amount of resources with the critical position of reception or intake or however you couch that position, you need to fix it now, and I want to help you.

My goal in writing this book is to share with you real-life applications to help you create the first impression your prospects ***should*** receive and to make sure that first impression is the one you ***want*** them to receive… that it's the one that will convert them from an initial inquiry to becoming a client with a case that is the right match for you and your firm, and that it's one that will ultimately add to your billable hours and bottom line.

Theory is important, but I want to go beyond theory and provide you with what you need to know and do to ensure that you can implement the steps needed to create a stellar first impression each and every time and convert those prospects to good clients.

Why me? If I can be so brash again, I've earned the moniker "The Phone Sales Doctor™" for a good reason and am considered a star in this field based on 25 years in the industry and am a nationally recognized sales and marketing expert. I have experience not only in the industry but also with publishing books that are straightforward, nuts-and-bolts approaches for the individuals who go by the title first impressions director, the front desk, receptionist, sales team, customer service, or the call center.

I founded the Law Firm Conversions™ Training Program for the very purpose to provide training and coaching to consumer law firms throughout North America with the goal to improve staff performance at the critical point of initial contact. I know that how those calls are handled – that is, the first impression made – has a dramatic impact on the success of a firm and can be improved. I know that how those calls are handled generates a return on your marketing investment. I know exactly where my clients are leaving money on the table and the steps they need to take to create the correct process to convert more ideal clients and gain a truly competitive advantage in any legal marketplace.

Heeding My Own Advice

Since I've already suggested that some managing partners, owners, and attorneys fail to "put their money where their mouths are," let me heed my own advice and share a few short success stories with you about how I've already helped others.

As part of training sessions, we require students to submit their "What I Learned" (WIL) statements. Here are just a few:

Kevin Sander at McComb Witten says that "each time I attend a session, I'm reminded of the importance of ***making a good first impression***. We now have a word for it — zealot."

Christopher Collins at John Foy & Associates says he now fully ***understands the need for a script***. He writes, "I promise to stick to it and provide the best customer service I can. Also, I would like to explain what I mean by unlimited sales opportunities. Each time my phone rings and it's a potential client, I feel confident that I'll not only get the sale, but will also leave a strong impression with the caller. So strong that if he or she is ever considers the use of an attorney, they will only consider John Foy & Associates."

Chelsea Vonrhein at Ricci Law Firm says she learned that is okay to ask potential clients the questions on the script even when they seem to be "closed off" because they are the ones calling us. She adds… "The calls that were recorded were not good and definitely made me more aware that improvement is needed. However, I do feel that it would have been beneficial to hear a good call from our office to boost our confidence and to show that the script is being read, then discuss how to improve on that as well. The bad calls need to be addressed but ***the good calls should also be acknowledged*** so that we can improve more."

Brenda Johnson at Monge & Associates says she learned that "sometimes when we have been doing the same thing for a long time we can tend to sound less empathetic and we need to be aware and check ourselves. We always want to end the call on a call to action. ***Following the script is key*** as it has been tested through the span of time. Make sure you are listening to the answers the client gives so as to not miss anything or to ask the same questions over again."

Ariana Tejeda at Marasco and Nesselbush says she learned that we should be glad that the phones are ringing. "We are in a very competitive field and ***should be happy and grateful that our phones are ringing off the hook***. Do a better wow welcome. That helps the client feel more welcome and confident that they called our office. We get to be the heroes for these clients who call Marasco and Nesselbush!"

Diana Walker at Heard & Smith says she learned new ways to implement the new script and to gather the necessary information. "I am pretty good with the beginning and end of the script… and building the relationship. I am going to make a concentrated effort to ***focus on the wow statement*** and repeating the crisis statement back to the lead. I am good at catching the crisis statement, but I don't think I repeat it back to them on a regular basis, if at all."

Marissa Anderson at Schwartzapfel Advocates Ltd says she learned that "We have to strive for that connection with the client with every phone call, even if it takes us off script a little. When we ***establish a trusting relationship*** with the client, it can develop a lifelong working relationship. We want them to feel comfortable enough with the first phone call that even if we can't help them, they wouldn't hesitate to recommend us to their loved ones."

Scott Sellers at Rainwater, Holt & Sexton says he learned the impact and degree that "emotional armor" has on the client/firm relationship. "There is an insight that when speaking with a potential client to show concern and support toward the individual's raw emotion. Not only do ***these acts of compassion help our firm to stand out***, but also creates possible future cases. I am excited to utilize these policies/strategies for future intakes."

So let's jump in to determine how you can capitalize on your ringing phones to really leverage the money you're spending on marketing and ultimately boost your bottom line!

Chapter One:
Mindset Matters

I promised a nuts-and-bolts approach with steps you can follow to improve the likelihood of every phone call converting to a client and case that suits your firm and ultimately creates billable hours and a better bottom line. So let's start with the very first step: Fixing your mindset.

Imagine a scenario in which ***every single*** ringing phone is a potential good client, capable of becoming the next huge revenue boost… but the calls are never answered! The phone rings until the caller gives up and hangs up. You'll certainly agree that any business – no matter what product or service they provide – that tries to operate without answering the phone or greeting customers or clients walking through the door is doomed for failure. They are. However, this scenario plays out every day in countless businesses in almost every industry.

Okay, I exaggerated when I suggested that calls are never answered in my example scenario and the caller gives up. Or did I? I will always contend that a poorly answered phone is the equivalent of one that is allowed to ring off the hook without ever being answered. Additionally, this scenario isn't at all hard to imagine because every single ringing phone does impact revenue! The most unfortunate part is that this happens all the time, and it is a complete waste of precious marketing dollars. Remember: The point of marketing is to get the phone to ring. That's all. Marketing cannot impact what happens after that phone is picked up. The fortunate part is that it doesn't have to be this way. The best part is that I can help you correct the problem.

As an attorney or managing partner, the reality is that you can't do it all! And that's not your fault, so you shouldn't even try. Your core competency is interpreting the law. Your education and knowledge about the law is how you generate revenue. Clients look to you to handle their cases efficiently and effectively with the best possible outcome for them. That's what you do; that's what you do well; and that should be your focus. Perhaps you're an excellent negotiator and have settled countless cases in favor of your clients. Great. That still doesn't mean that you're the best negotiator when answering the phone… or when training and coaching others how to do it and do it correctly! So, step one: Change your mindset if you think you're the best person to answer the phone (you're not) or the best person to suggest how it should be done (you're not).

Every ringing phone is a revenue opportunity. Don't waste it!

The person who should be answering the phone is a person who focuses on people the same way you focus on the law. That person may go by the title of receptionist, the front desk, first impressions director, intake specialist, customer service, or the call center. Regardless of how you title this person and regardless of how your operation runs (e.g., a receptionist hands off prospect inquiries to an "intake specialist"), for brevity of reading (and writing), when I use the term intake specialist, I'm referring to the person who is responsible to field a prospect's call, determine if the case is a good fit, and take it to the next step to schedule an appointment, effectively closing the sale.

This person is the one who is going to create that all-important and critical first impression. This person is the one who can impact your revenue and bottom line. This person is the one who is as important to your firm's success as you are.

Fixing Mindset

You need to fix your mindset if, up until this point, you have not truly considered and embraced the importance of the intake specialist. Depending on the size of your firm, perhaps your receptionist wears the intake specialist hat as well. If that's the case and if you think of this person only as "the one who answers the phone," you are making a huge mistake. There is so much more to the process than picking up the phone and politely – even cheerily – saying, "Good morning. How may I direct your call?"

If that has been ***your*** mindset, I'm going to also suggest that you have an even bigger and more complicated problem to address. If you think of your intake specialist simply as the person who answers the phone, your intake specialist probably only thinks of themselves as "the person answering the phone" as well. You have to fix your mindset, and they have to fix theirs! However, it starts with you. As the attorney, owner, or managing partner, you are the one setting the tone. For the most part, only when you convey the importance of the position will your intake specialist adopt that same mindset. Sure, there are exceptions to that, and there may be some very self-assured people in the role of intake specialist who clearly understand their worth to the organization, but it's my experience that this is very much the exception and far from being the rule.

The intake specialist has a job that is as important as that of an attorney in any firm.

You may be convinced that you're practicing law, not selling something; however, in every single profession and industry, there is an element of "selling" that must occur in order for an organization – from law firm to medical office to brick-and-mortar retail store – to be successful and continue to operate profitably. In your case, a "sale" occurs when a prospect in need of legal counsel or representation schedules an appointment and hires you or pays a retainer. Yes, you are selling; you are running a business; and you are an entrepreneur.

There are a lot of people who shy away from and even downright avoid the idea of selling. The task is often linked to the image of the used car salesman – pushy, focused only on closing the deal, perhaps teetering on unethical. Change your mindset about selling if that's the first image that pops into your head. Your intake specialist may have a similar sense of the role of "selling." If that's the case, they certainly have to change their mindset about the critical role they play in your organization and understand what "selling" really is in terms of your firm.

As I stated earlier, your intake specialist should be someone who focuses on people the way you focus on the law, and that goes far beyond being cheerful and friendly. While those personality traits are important, the intake specialist needs to be a person who truly wants to help others. In any industry, a good salesperson is one who embraces problem solving for other people by matching their company's product or service to the client's or customer's need to alleviate their pain point… whatever that pain point may be.

Depending on the focus of your legal practice, there can be a lot of pain – literal and fiscal. ***You*** have the knowledge and experience to alleviate that pain for clients; however, they have to get to ***you*** first. This process follows the classic sales funnel: Marketing brings prospects into your funnel (e.g., the phone rings) and a positive outcome is what transpires at the end of the funnel and process. However, you'll never reach the end of that funnel unless you have an intake specialist who's fielding the call, making the best first impression, assessing the viability of the case for your firm, and then scheduling the appointment with you.

When posed with the question, "What did you do at work today?" you ***don't*** want an intake specialist who answers, "I answered calls and scheduled appointments." Nor should that be your expectation of them. That's where the mindset needs to change. You want and need a person whose answer is: "I didn't just answer the phone. I helped solve life-altering problems for our clients!"

In effect, that is exactly what your intake specialist does. That's what they should want to be doing, and that's what you should expect of them. With a mindset of "solving life-altering problems," both you and your intake specialist will have a greater appreciation for the very important role they play.

Budget Inequity

With the new and expanded mindset of your intake specialist being responsible for "solving life-altering problems," it's time to look at your firm's budget allotments. The two that you must compare are your advertising budget versus your intake budget – the amount you spend on marketing versus the amount (salary and benefits) you pay your intake specialist(s).

> ***Budget inequity between marketing and intake leads to ringing phones that do not convert to quality cases.***

If these are unbalanced with more spent on marketing, I assure you, you are wasting all of your marketing dollars. When advertising expenditures exceed your intake allotment, you're setting yourself up for failure. Consider a dam on a lake: If water continually flows in without an equal amount being released through the dam, the lake overflows and finally the dam will burst, leading to disaster. If you continue to spend on marketing without also increasing your intake team, you are also asking for disaster. I see this happen in far too many firms, and yes, the failure to increase the team proportionately with increased marketing expenditures always leads to added stress, lost opportunities and revenue, and a decline in profitability.

Remember the scenario I painted at the beginning of this chapter? The one in which the phone was ringing but no one was answering it? That's exactly what happens when your advertising budget exceeds your intake budget. "But wait a minute, Chris," you'll say. "Our phones are being answered!"

I'll concede that point but counter with an important follow-up question: "Are they being answered by someone who's too busy and harried throughout the day to effectively serve the prospect on the other end of the line?" If so, you have a budget inequity. If the phone is ringing but calls are not converting into cases that are the right match for your firm, you have an intake problem. Perhaps the person answering the phone doesn't understand the very important role they play in the organization and doesn't realize that they have the power to provide "life-altering solutions." Perhaps you never told them that they could be such a person with such an important role. Perhaps you made a bad hire from the start and have the wrong type person wearing the intake specialist hat in your organization.

Either way, it's time to fix that, so let's continue.

Answer the Phone!

- Every ringing phone represents an opportunity to boost revenue. Answering a call poorly or ineffectively is no better than not answering it at all.

- You can't do it all, and that's not your fault. Focus on your core competency of interpreting the law and representing clients. That's how you generate revenue.
- Your intake specialist must focus on people to the degree that you focus on the law.
- If you think the only job of your receptionist/intake specialist is to answer and redirect calls, you're wrong… and you need to fix that thinking immediately!
- You set the tone for the importance of the job of intake. Be certain your intake specialist understands how important they are to the process.
- The mantra of the intake specialist should be: "I didn't just answer the phone. I helped solve life-altering problems for our clients!"
- Your marketing budget and intake budget must be balanced. Money spent on marketing without corresponding intake dollars leads to ringing phones that are not answered effectively. That imbalance leads to wasted marketing dollars and potential revenue left on the table.

Chapter Two:

The Evolving Role of "Receptionist"

Now that you have a clearer picture about the importance of the intake specialist and understand how critical it is for you and that person to change your mindsets about the critical nature of that role to the success of your firm, let's change the lexicon also. In the old school of the last century, receptionists have typically been referred to as "girls." I actually sometimes ***still*** hear that word used: "Call my girl to set up an appointment."

If that's what you call them, then that's what you're going to get. The old school Gal Friday might make you a mean cup of coffee, but you need so much more if you want your firm to run profitably and – wait for it – even grow!

No matter how much money you are spending on advertising, I know that it is an incredible amount for you and your firm. It always is. It's not unthinkable for some of you to be spending millions to get your phones to ring with leads, prospects, and hyper-responsive clients. They dialed your number because your marketing is exceptional and doing a good job. You've finally figured out the right platform on which to market and the right formula for your advertising strategies and tactics.

Back to "your phone is ringing but…." What happens when it rings? How is the call handled? Did the caller schedule an appointment? Or was the call lost (not literally but certainly figuratively) because your receptionist was too busy handling all the other tasks that inevitably drop on their desk? This is especially an issue when your receptionist does double duty as your intake specialist. There's nothing new here: The receptionist has always been dumped on and expected to handle all the busy work that others can't or won't do. The receptionist is almost always the go-to person for anything and everything that another person in your operation can't get done. Gal Friday, indeed. It's been that way for a very long time, and sadly, for some firms, it shows no sign of changing anytime soon. ***This is a critical mistake.***

> ***The receptionist historically is the person who takes on all of the miscellaneous tasks. It's time to break that habit right now.***

I see this mistake occur repeatedly, not only in the legal niche but in almost every industry. Take a moment to think about the situation from the point of view of your receptionist: Would you, the attorney/managing partner be able to deliver a compelling case presentation while at the same time hearing a phone ringing in your ear with other team members standing right in front of you, waiting for you to finish up so they could talk to you? Of course not.

It paints a comical, albeit rather frightening, image, doesn't it? Of course you must focus on your presentation, your client communications, and your sales skills, and to do so you need the ability to concentrate and block out distractions. The same is true for your receptionist, especially if they are also filling the role of intake specialist. That's exactly why asking them to do double duty is rarely effective. I'll go so far as to assert that it ***never*** works, and if this is your operating model, you're leaving money on the table.

Jack-of-All-Trades Won't Work

Whether or not you use the 5-Step Relationship Sales Conversion Script™ and Intake Screening Questions or have devised a similar version on your own, your intake specialist needs 100 percent focus when on a call. Moreover, handling that call effectively is a skill; I'll even go so far as to suggest it's an art. And it's not for everyone.

The intake specialist's job is to greet your prospects and clients with the attention they deserve and a smile that assures them: "Don't worry. You made the right decision, and we're on your side. We're here to help." If you want to keep giving your receptionist/intake specialist myriad other tasks – answering other calls, making call backs, handling email, making coffee, ordering supplies, filing, and handling every other task – then you will continue to hemorrhage profitability and waste every marketing dollar you're spending while turning away prospects, alienating and losing current clients, and failing to get referrals.

Consider this scenario that is quite parallel (and perhaps you've experienced it firsthand): You go to a therapist for the first time, and the two of you are alone in the office talking about your issue. You're feeling them out a bit, testing whether or not they really get you and if they might be the one who can help you work through to a solution. You've been down this road before, so you're hoping this person is the one – the one who can finally help you break through, so you can stop the insanity of looking for the right therapist – and then… ***the therapist looks at the clock!*** In that split second, you know you can write them off because you and your issue are not important to them.

That's exactly what happens when prospects call your office – when they finally decide that today, now, this moment, it's finally time to call ***you***, so ***you*** can help them with their problem – and the initial contact they receive is akin to the therapist looking at the clock. You (as the receptionist who's also filling the role of intake specialist) aren't focused on the caller at the moment. You're mentally someplace else because there are other phones ringing and calls to be answered and multiple people standing around waiting to talk to you. With those distractions, it is not possible to give your all to the caller, to be the expert you need to be to understand their problem and ensure them that your firm is the right fit… to win them over. You must have permission to focus on this one single call at this moment in time – the person and their story and nothing else. You can't do this if you're a jack-of-all-trades Gal Friday doing everything in the office short of interpreting the law, can you?

An opportunity call requires 100% focus, nothing less.

If this is the model (i.e., receptionist as intake specialist) under which you are operating, it is time to rethink your structure… and do so promptly! And at the very moment I'm suggesting that, I want you to first do your homework and really assess your current operation:

- Understand why the receptionist can't do it all and what's getting in the way of that.
- Are there other team members who can help with incoming calls that don't require the expertise of an intake specialist?
- Do you need to hire more staff to handle incoming calls? (Consider whether you have a budget inequity between your marketing expenditures and your ability to handle the leads generated!)

Before you make any changes in your staff or make additional hires, you must know the metrics by which you measure the situation. Answer the following:

- How many calls do you get daily?
- How many of those calls are opportunities (i.e., prospects responding to your marketing and contacting you)?
- How many opportunity calls schedule appointments?
- How many appointments are kept (i.e., the prospect shows up)?
- What happens to the prospects who don't keep a scheduled appointment?

Depending on your answers (especially regarding the number of calls and the percentage of those that represent opportunities), it may indeed be time to make changes; however, you cannot make an informed decision without knowing your actual numbers. This is "Business 101" type thinking: What gets measured improves and what you focus on expands.

Know your numbers and ensure that your team understands the numbers as they relate to them. If you’ve determined that you really don’t have adequate staff in place to stop the “lost prospect/wasted marketing dollars/lost revenue” hemorrhaging, here are my expert recommendations:

1) Do not use the receptionist for closing sales (i.e., acting as the intake specialist as well). Stop it! S.T.O.P… I.T… and stop it right now! Perhaps promote your current receptionist who knows your firm thoroughly to become the intake specialist and hire someone else to handle all the other tasks or hire a sales expert to handle intake calls.
2) Create your own internal call center or contact center (depending on the call volume), even if you’re only starting with a few people.
    a. All prospect calls will be directed to this team. Perhaps use a specified/dedicated phone number in your marketing that rings to your call center rather than the front desk.
    b. They are the closers, and it’s their job to close as many appointments as possible.
    c. Give them a sales goal for closed appointments and hold them accountable.
    d. Follow the Chris Mullins Famous Formula: RMFD^{TM} – Record, monitor, feedback, daily: Record the calls (check your state laws for recording calls);

monitor and listen to the recordings; provide feedback by listening to the recordings with the team; provide daily praise and constructive criticism.

(If you swallowed hard at my suggestion to create your own call center and think it's impossible, let me reassure you that The Chris Mullins Phone Sales Doctor™ and in-house team of Law Firm Conversions™ Training Program coaches regularly work with law firms on how to set up their own call centers, conduct training, and get the results they want.)

I assure you that you are putting far too much stress on your receptionist and your entire team if you do not have a dedicated intake specialist or team of specialists. I believe they are your insurance policy for your marketing dollars – ensuring that when the phone rings, it's answered effectively to boost your revenue and profitability. Think about the time, money, energy, and effort you put into marketing campaigns. You need to put the same amount into your team!

Acquisition and Retention

We've already covered that you're spending a lot of money on marketing, and there's nothing wrong with doing so as long as your phone is ringing. A ringing phone equals successful marketing. Prospects have possibly prequalified themselves based on your marketing message and have raised their hand to speak to you. But it goes a little bit deeper, and you already know – having read this far – that

I'm going to reiterate that what happens the moment the phone is picked up can make or break your overall success.

In the legal niche or in any given industry, success is a numbers game. You can review your own metrics regarding the cost of acquisition. In its simplest form: annual advertising budget divided by the number of new clients you bring in. Perhaps you've calculated that, and you're spending in the neighborhood of $500 just to get one prospect to ***call*** you. Now you have to make the best of that investment, and that's riding on the person answering the call. If that person is ineffective, there goes $500 right down the drain.

Know your call metrics and the conversion rate. It directly impacts your bottom line.

What percentage of opportunity calls are turning into cases? And here's where it can get a little sticky, so let's really clarify it: What percentage of opportunity calls are turning into ***quality*** cases that are the right fit for your firm? If your intake specialist is converting 50 percent of calls into appointments, that may sound great… but only if those appointments pan out to become quality cases that it makes sense for your firm to represent. It's not simply a matter of closing the deal; your intake specialist also has to "weed out" those prospects who are not the right fit and will become a waste of time.

The better your intake specialist is at this, the more you will drive down your cost of acquisition. The more your drive down your cost of acquisition, the more profitable your firm will be.

With that in mind, I'll circle back and reiterate that it's impossible to have the person who's trying to qualify quality leads and convert them to clients to also have a desk full of other tasks and assignments: greeting clients, making outbound calls, setting up conference rooms, etc. When the phone rings, your intake specialist, paralegal, attorney, whoever answers the call, must be ready to provide 100 percent focus on that call. As soon as you, as the owner/managing partner/attorney, embrace this, everything will change for the better.

Knowing the critical importance of a really talented intake specialist, retaining that person is a key piece of your overall success. Focus on your intake specialist(s) and give them everything they need to do their job. Treat them like "mini business owners" or shareholders in your organization because they effectively are. Provide everything they need: recognition, motivation, reward, and ongoing coaching and training. Additionally, keep in mind that this is a position that can be and is often very stressful. Calls can come in at a moment of crisis, and it can be traumatic for the person answering the phone. Ensure that your intake specialists get the breaks they need and know they can ask for help when they need it. Without this support, I assure you, you will be creating a revolving door at this critical position. When you do these things, your team will stick with you. Retaining team members drives client retention as well. If you help your team, your team will help your clients. It becomes part of your firm's culture.

Too many owners/managing partners/attorneys view the role of receptionist/intake specialist as entry level, and I assure you, it’s anything but! This kind of position can also be one with a revolving door, and that’s one of the worst things that can happen. You must hire for this position effectively and then work to keep talented intake specialists! Hire professionals and pay them like the professionals they are. (Note: We’ll cover hiring and training in a later chapter.)

Recognition

Too often, firms put the fewest resources into recognizing what may just be the most important job in the office. Wait. Did I just suggest the intake specialist is more important than the attorney? Yes. The attorney’s expertise never comes into play unless the prospect-turned-client actually ***speaks*** to the attorney. That conversation never takes place without a talented intake specialist.

> ***Lack of recognition is one of the primary reasons employees depart. It ranks higher than salary and benefits.***

Take a moment to really consider and empathize what your intake specialists go through every day, and remember that without them, you’re out of business – or you’re left to answer your own phone, and there’s no profitability in that. Again, you can’t do it all. All day, every day, these folks are taking phone calls that primarily involve pain and suffering (literal or figurative). They almost always involve a problem or complex situation… or why else would the prospect be calling? Sometimes the calls involve listening to crying, yelling, swearing, suicide threats, recounts of abuse.

It's a tough job. It's a stressful job. So recognize that.

Everyone has a basic desire to be appreciated. Even a simple "thank you" can go a long way! Lack of recognition is one of the main reasons employees become dissatisfied with their jobs. It even ranks higher as a reason for departure than salary and benefits. That's why recognizing the job your intake specialists do cannot be overstated. (While I'm going to cover hiring and training later in the book, I feel that recognition is so important – and foundational to retention – that I want to cover it right now.)

Recognition from the boss is important, but so is peer recognition. Peer recognition programs are easy to implement, and done right, they can mean more to the individual than getting kudos from the boss. Recognition programs create a positive workplace and encourage employees to observe their co-workers' habits. The idea behind the program is twofold: catch people doing things right and getting employee praise. To be effective, the praise must be specific. "You did a great job" is not as impactful as: "Wow, Mary. I was really impressed when I heard you handle that client's problem."

This sort of praise also acts as a positive reinforcement that increases the likelihood that a particular behavior will be repeated.

Some examples of peer recognition may include:

- An act of kindness or personal support
- Dependability and promptness
- Exceptional performance for a complex task
- Working extra hours or on personal time
- Motivating and encouraging team spirit
- Delivering excellent client service/support
- Offering solutions and resolving problems
- Community service
- Any positive impression they make

Recognition programs positively impact retention and your business culture, and as importantly, they impact recruitment as well. When employees feel appreciated, retention improves, and retention demonstrates organizational loyalty and promotes a positive business culture that attracts both good employees and clients. What goes around, comes around, and peer recognition can keep that positive cycle in continuous motion! (I'll cover more ideas and best practices on developing a peer recognition program in the Hiring, Retaining & Training chapter.)

Answer the Phone!

- In nearly every business in every industry, the receptionist ends up as the responsible party for all the tasks that no one else can get to. Handling intake calls ***cannot*** be another task!
- Effectively answering an opportunity call and closing that "sale" takes focus, concentration, and skill.

- If your firm's model is one in which your receptionist is also your intake specialist, I strongly suggest you rethink that and take steps to change it.
- You must know your metrics regarding the number of calls and percentage of calls from prospects and handle those accordingly, or you are wasting every marketing dollar you spend.
- A talented intake specialist is responsible for "closing the sale." They must also qualify prospects, so the cases you get are quality cases and match your expertise.
- The role of intake specialist is not an entry level position and should not be treated as such. Allowing a "revolving door" at this position will prevent your firm from truly being profitable.
- Similarly, ensure that you are dedicating adequate resources to recognizing the importance of your intake specialist(s).
- A peer recognition program can positively impact retention, your business culture, and ultimately recruitment. You'll be attracting the best employees and clients as well.

Chapter Three:

Phone = Revenue

Most businesses rely on the telephone, and that's especially true in the legal industry. Your marketing is working, the phone is ringing, and guess what? That prospective client actually expects to speak to a live person – a real human being – when they call your firm. More importantly, you should *want* them to speak to a live person from the outset.

No matter how well-crafted and dictated a voice message may be, it cannot reassure your prospect and convey the message that they've called the right place and that you are there to help them the way a live person can communicate that very critical message.

In other industries and in the retail world, prospects may expect to immediately be met with a voice message; however, in professional circles, legal and medical niches especially, they're calling with a problem – perhaps a very urgent problem – so they expect and need a human on the other end of the line.

Consider these statistics: 80 percent of new customers or prospects will ***not*** call back or leave a message if they get voice mail. Frighteningly, only 25 percent of business owners believe the telephone has a major impact on their business. Yikes. That combines for a lot of lost prospects and a lot of lost revenue. That statistical combination can certainly lead to business failure.

You already know that ***what you actually say*** accounts for a very small percentage of the message you're communicating. The bulk of communication occurs through body language and tone of voice. Consider Albert Mehrabian's studies on non-verbal communication in the 1970s. He demonstrated that a mere seven percent of what we communicate is the content of the message – the words we actually use. Voice, including tone, pitch, volume, and inflection, makes up 38 percent of the overall message with body language accounting for the rest. Obviously, what you say is not as important as how you say it!

It's critically important for a live person to answer your phone and answer it correctly and effectively. All the money you spend on marketing is driving prospects to one place: your telephone number. When they finally decide to dial, they want to talk to a live person… the person who can assure them that they've come to the right place, understand their problem, and put them on the path to finding the solution.

What you say is never as important as how you say it.

Now, you may have your phone system set up to go into voice mail if it isn't answered in a certain time frame, but I'll assert again: That should never happen! My team and I have heard every excuse in the book about why a call goes to voice mail, and while some excuses seem reasonable and some are worth a chuckle ("I didn't know how to take it off night mode." Really?), there really is no excuse for this to happen. Yes, if a prospect calls after business hours, they probably expect to get voice mail and intend to leave a message, but in your industry, that's probably a rarity.

Very simply: The phone will make your firm look very good or very bad. The choice is yours.

Answering Service Nightmares

Yes, you must have a live person answering phones during business hours; however, don't think that using an answering service with a live voice is necessarily a silver bullet or even the solution.

As with any and all outsourcing, the company to whom you outsource a service represents you and your firm! They may or may not be any good or have the level of professionalism that you want and need. Your prospect won't know that they've reached an answering service when they call. They will only know that a live person picked up. And remember, first impressions count. Whether or not the first impression is generated by your staff or an answering service doesn't matter. It's the first impression the caller gets, and that's the one that can make or break your potential relationship with a prospect.

In my role as a ghost caller/mystery caller, I've ended up in nightmarish situations with answering services. I've been greeted with sidebar laughter and other ongoing personal conversations before the person speaks to me, been immediately transferred to a voice mail upon requesting to speak to someone without any sort of acknowledgement, been told the person isn't in and that I should call back later, and have been told, "This is just the answering service."

Just the answering service. Certainly not the first impression you want to leave on a prospect who represents real revenue to your firm. Trust me, these types of responses from answering services are not uncommon… and that's very scary! If you choose to outsource, choose very wisely, and then ensure that they're trained to your organization, standards, and expectations and monitor them. (More on the critical importance of "inspecting what you expect" in a later chapter.)

Monitor Calls

With a live person answering the call, it's time to focus on that person or people tasked with fielding calls. First and foremost, ***everyone*** in the office should welcome an incoming call rather than consider it to be an interruption. Get them excited about the phone every time it rings. Get them motivated to answer with the goal of qualifying and closing an appointment. Your entire team – intake specialists, receptionist, attorneys, etc. – must think in terms of each call as a person, an individual with a name… because that's exactly what they are. I know some firms that refer to these as "PNCs" (prospective new clients), but your team must embrace the mindset of thinking of them as people you're helping, not de-personalized acronyms. By always thinking of them as the real human beings they are, your mindset (and that of everyone in your firm) immediately changes the tone and tenor of the conversation, and tone and tenor make up the bulk of what you communicate. Make sure your voice communicates that you value the prospect as a person and are positioned to help them.

Simply stated: ***The phone opens or closes the door to your firm.*** Nothing else matters if the phone is not answered effectively. By effectively, I mean that prospective clients schedule and keep their appointments. The first voice a prospect hears impacts their impression of you and your entire organization. Ineffective phone answering closes the door, and a closed door translates to wasted marketing dollars. A closed door ultimately drives you out of business.

> ***Measure and monitor calls if you expect improvements.***

Your staff must be trained and well versed on best practices of phone etiquette: how to place someone on hold, how to transfer a call, take messages, repeat phone numbers, initiate the call to action. The best way to handle this is via scripts, but your staff must also understand how to effectively use scripts to avoid sounding robotic. (More on scripts later in the book.)

Put a system in place to monitor your call flow – how many calls come in each day, what type, what happens to the calls. Monitor and measure incoming calls. Remember: what you measure improves! There is plenty of technology available to use to track this vital information that allows you to capture every call along with the date, time, caller name, caller contact information, staff name who took the call, results, and dates for any follow ups. I'm sure you already have some sort of CRM system in place. Be sure you are using all of its features and leveraging the reports you can extract from it. I won't recommend one software over another, but I absolutely assert that you must use one to monitor incoming calls! Recording this is vital to your monitoring efforts; however, if you track calls without ever reviewing the data, you've just wasted everyone's time… and your money. Additionally, record calls (literally, if allowed by law in your state) to review and critique for training and quality assurance.

Use staff meeting time to review the reports and recorded calls to identify questions and answers your team must have ready. Adjust scripts as needed when improvements come to light during your review sessions. Have staff share stories of clients and particular situations along with how they successfully handled the call and scheduled an appointment. Talk about recorded calls and how to improve each one.

Best Practices

The phone is critical to your firm's overall success, and it certainly impacts your bottom line. Here are a dozen best practices that your intake specialist(s) can employ for more effective use of the phone:

1) Time yourself to measure the length of each call. Calls that go on too long become ineffective. Focus on the problem, and while you want to be empathetic, your goal is not to become the prospect's best friend. The goal is to "close the sale" and schedule an appointment. At Law Firm Conversions™, we coach our clients how to control the call, to redirect the conversation to stay on point, and to do a

Compassionate Interrupt™ during the conversation to get it back on track.

2) On outbound calls, ask permission to speak when you call a prospect. No exceptions!
3) Dig deep to get inside the prospect's head and identify their emotional pain. What prompted them to call? Listen for the personal motivator.
4) Practice ***pausing*** with each new call.
5) Do not interrupt or talk over prospects. You cannot simply focus on getting through your own agenda on a call. Your purpose is to discover the prospect's want and need, and you cannot do that if you interrupt them with your own thoughts.
6) Find out where the prospect may push back regarding making (and keeping!) an appointment.
7) Really listen to the prospect. Can you repeat back what they said in the exact words they used?
8) Pay close attention to the prospect's language and vocabulary. This will help you communicate more effectively. Avoid using legal jargon that they probably won't understand and which they'll likely find very intimidating.
9) Practice slowing down your thoughts before you speak.
10) It's easy to be excited to help a prospect (remember: a good intake specialist thrives on helping!), but you must allow them to finish their own thoughts and comments at crucial

points of discovery. Otherwise, you are not being effective and will fail to ask for the appointment at the appropriate time.

11) Balance the need to let the prospect speak with a sense of urgency to avoid letting the call drag on. This is a tricky point and can be difficult, and this is why the Law Firm Conversions™ Training Program is truly beneficial.
12) Realize the telephone is the most time efficient, least expensive sales conversion, relationship-building, and communication tool you have. ***If you fail to use the phone effectively, you are wasting every single marketing dollar you spend!***

Yes, your phone equals revenue and profitability. Effectively using the phone will grow your firm, but failure to handle calls correctly will lead to you shuttering your office and going out of business. I am not exaggerating when I say this. Trust me.

Answer the Phone!

- The phone is the life line and life blood of your firm. I am not overstating this!
- Callers should be met with a live person each and every time during normal business hours.
- The actual content of your message only accounts for a fraction of what you actually communicate; the rest comes from voice tone and tenor and body language.

- An answering service may not be the best solution. It depends on their level of professionalism and how well they know and can represent your firm.
- You must monitor calls and leverage your CRM system. However, that alone is not enough. You must also review the reports and critique calls in order to make improvements. Failure to do so wastes everyone's time and your money.
- Employ each of the best practices I've shared to make the most effective use of the phone.
- Your phone will make or break the success of your firm. It really is that simple.

Phone = Revenue

Chapter Four:

Inspecting Expectations

I'm sure you've set certain expectations for your firm long before you opened the pages of this book. You expect clients and prospects to be treated and handled with the utmost professionalism by everyone on your staff. You expect your organization to operate in a particular manner. Great.

No matter what industry or niche any firm, practice, or business serves, the entrepreneurs behind every organization have expectations for both customer service and operations – from professional services to retail to manufacturing. If your expectations aren't communicated and shared, those expectations will certainly never be met or adhered to. "Of course, Chris," you're thinking. "No one is a mind reader. Of course I've communicated with my staff the way I expect them to handle clients!"

Great. Perhaps you've even attempted to coach them on the most effective way to answer the phone (or you now understand the critical importance of doing so and have it on your to-do list). Also great. However, that isn't enough… and ***it will never be enough.*** You actually have to "Inspect What You Expect™." Telling and teaching are important, but examining that your staff is carrying out what you teach them and abiding by what you tell them is critical to the success of your organization. That's what I mean when I say, "Inspect what you expect."

When was the last time you called your own office specifically to monitor how the call is handled? Have you ***ever*** done that? When calls are handled poorly, there's always a long line of excuses regarding the reason. I've heard them all, and they all stink! When law firms hire the Law Firm Conversions™ and my team to investigate via ghost calling/mystery calling (or listen to supplied recorded calls) and report shocking results, they're quick to say:

- "I know it's not always like that."
- "The person was new."
- "I see the problem, but we're busy right now, so I can't afford to let that person go."
- "We're understaffed."
- "It's vacation time."
- "So-and-so was out sick that day, so someone else was filling in."

Yeah, yeah. Like I said, I've heard all the excuses and not one of them holds water. Whether you fail to inspect what you expect or ignore the negative results when you do, it doesn't matter. Either of these failures will cause you to close up shop and go out of business! You must inspect what you expect all the time, and take corrective action when the results are not up to your expectations and standards.

You might be shocked to learn how calls are answered. Set expectations and then inspect them.

Ghost Calling/Mystery Calling

It's a mantra with me: Inspect what you expect!

Ghost calling is the best way to inspect what you expect. Many firms record their prospect phone calls (again, where permitted by law), so sharing those recordings with us replaces the need for actual ghost or mystery calling. It may sound ominous, but it's not when you do it right, and when you do it right, it's extremely effective. You are not setting out to catch people doing something wrong in order to dole out punishment. You want to learn where there is opportunity and need for improvement. Your ultimate goal for inspecting what you expect is to actually catch your staff doing everything right!

When you start out and tell your staff that you'll be doing ghost or mystery calls, they're not going to like it. Initially, they'll be concerned, afraid, feel threatened, and think that you don't trust them. Their impression will be that you're doing this to catch them doing something wrong, so you can get rid of them. These reactions are normal, so be prepared for them. Keep yourself focused on the need for inspecting what you expect and the ultimate goal of success for everyone on your staff. With that mindset, your staff will find it a little easier to accept.

Don't back off, get nervous, or let your staff convince you that this sort of inspection isn't needed. It is. In fact, it's needed in every single business in every single industry, and this is especially true in the legal niche. The phone is critical to your firm, and how it's handled will make or break your success. You have to monitor your staff daily and track incoming calls. We've already covered the importance of the phone to your firm, and you need a good staff to go with it. Without both of those things – ringing phone and qualified staff answering it, you're done. It does not matter how smart you are or your track record as an attorney or managing partner.

Ease into the process and reassure your staff that ghost calling (that may include having the Law Firm Conversions^{TM} Training Program coaches listen to recorded calls) is a positive program to help them become sharper than ever, to do better than they have, and to enhance what they're already doing right. Pay specific attention to that last part: enhance what they're already doing right. Stress that aspect to your staff because that's a far better message than, "We want to fix what you're doing wrong." Positive reinforcement (i.e., rewarding behavior you want to see repeated) always goes further and is dramatically more effective than its inverse.

Ghost calling should focus on the positive first, then uncover areas that need tweaking for improvement.

Don't give up. This takes time and is an ongoing process. Creating new behaviors is about making decisions about what the behavior should be – the expectation – and then dumping old behaviors to make room for new ones by way of inspection for improvement. Everything you do in your firm with regard to your staff should be done from a positive standpoint. That's really basic "Management 101" thinking.

Educating your staff and the ongoing coaching and training you provide has to be based on relationships, communication, and sales. How you treat your staff sets the culture for your entire organization. And how you treat staff is ultimately how your staff will treat prospects and clients.

A ghost calling program is critical to your success, so don't overlook this aspect of your call center and staff responsibilities. That said, I fully understand that it is not easy to create and implement such a program. You're already very busy! You can't do it all. I understand that your plate is full. However, that's no excuse to forego this. Instead, this is something that I recommend you outsource, and Law Firm Conversions™ offers the Mystery Checkup Call program or the opportunity to listen to your prospective client recorded calls to effectively handle "inspecting what you expect." (See the Resource section for additional details.)

Following Up

Once you've either done the checkup calls or hired Law Firm Conversions™ to do them for you, you must follow up and share the results with your team. As with keeping phone reports, if you do ghost calls but fail to review them and take necessary action for improvements, you're wasting your money and everyone's time!

In reviewing results and sharing the critiques, here are the steps to keep in mind:

1) Calm down. Breathe and relax.
2) Remember your purpose: To influence your team to repeat the great things they've been doing and tweak the areas that need improvement. (Pay particular attention to the language I've just used and the order in which I've used it! Address the positive first.)

3) Have a plan before you review the critique with them. Take time to listen to call recordings (presuming recording is legal in your state) and additionally make your own notes about the good calls first and why it's important for them to continue repeating what they are doing correctly and doing well. Again, share this information first. Many intake specialists don't even realize what they're doing well when speaking with prospects because it's part of their routine. Be certain to point out all of the positives!
4) Next, share the areas that need tweaking for improvement, and give specific examples. Equally important, share why it needs to be improved.
5) Ensure that you offer the solution: how to improve what needs improvement. Without a solution, it's all moot.
6) Make this review session fun. Smile! You want to create an atmosphere that makes your team look forward to critique sessions and even ask for them. Sound impossible? It's been my experience that this will happen, but the experience must be positive.
7) Hold your team accountable for the needed improvements. Map out a plan with specific steps.
8) With your plan for how they can make improvements, include how you can help them and when you'll meet again to review progress.

9) No one really enjoys hearing their own recorded voice, but listening is the key to making improvements.
10) Pay attention to your staff: guide them, coach them, and encourage them to meet with you. Watch your own tone, body language, and words. Remember: You're being observed, too.
11) Commit to listening to calls every week as a group critique together. No excuses to miss this. Teach your team to self-critique.
12) Make this review important; don't drop the ball on this. Keep at it. Your staff is probably waiting for you to drop the ball on this, especially if you've done so in the past with other ideas and programs about which you were initially fired up. Not this time. It's too important.
13) Give your staff the tools they need: ongoing coaching, sales training, relationship and communication training, scripts, outlines, FAQs, objections lists with correct answers, role-playing opportunities, and support.
14) Peer recognition: Remember the importance of peer recognition. Encourage it, require it, and systemize the process.
15) Catch your team doing something right… daily!

If you're thinking, "Chris, they should know how to do this by now," that's the wrong attitude. They're people… humans. And people need to continually be reminded of what to do and how to do it. Plus, ongoing praise for doing things correctly can never be done too much. Receiving an "atta boy" never gets old. Be sure you've given them the right tools, guidance, information, training, and ongoing coaching and mentoring. Making improvements and growing in their own abilities is as important for them as it is for you, your firm, and your bottom line.

Remember to create an ongoing reward program and recognize your staff for even the smallest improvements. I can guarantee that if you don't handle critique review the proper way, sabotage will rear up and show its ugly head. (More on sabotage in a later chapter.)

Here's an example of your own script to introduce this process and program: "Great news! We're going to have the Law Firm Conversions™ Training Program experts come in and help us – you and me, included – perfect our phone sales skills, conversion, and customer service to improve our bottom line, and the number of new client appointments and cases we take."

Inspecting what you expect is paramount to your overall success! If you are nodding yes and fully understand and agree but at the same time are wondering how you can ever implement a program, the solution is simple – call Law Firm Conversions™. "Inspecting What You Expect" is an integral part of what we offer. Law Firm Conversions™ will create the program that fits your firm and integrates with the way your organization operates.

Answer the Phone!

- Your expectations for the way calls are handled and the way your firm operates must be communicated first and then inspected.
- Ghost calling is the ideal way to "inspect what you expect" and monitor how calls are handled.
- When your staff learns that calls are going to be monitored, they won't like it and are going to push back. Be ready for that.
- Adopt the mindset that the need for ghost calling is to catch staff doing things correctly and to tweak where improvements are needed… then communicate that message, emphasizing the positive first.
- Ease into the process and do not give up! Keep the focus on positive reinforcement.
- Outsource this aspect of your business – you cannot do it all.
- You must follow up and review the results with your staff, so they know what they're doing well and what needs improvement.
- Consistently emphasize that the program is to enhance what they're doing right. You aren't doing this to yell at them.
- Making improvements on the effectiveness of incoming calls is good for the entire organization.
- Consistently recognize even the smallest improvements.

- Contact Law Firm Conversions™ to help you Inspect What You Expect™.

Chapter Five:
Steps to a Successful Call

Your phone's ringing, you've adjusted your mindset about the importance of the role of intake, you've at least made a note to check the balance between your marketing and intake expenditures, ditto to a peer recognition program, and you're going to also inspect what you expect.

In inspecting what you expect, it all starts with the telephone greeting. Remember those first impressions we discussed at the beginning of this book? Right. Those. You may be nodding or you may now be shaking your head thinking I'm about to beat a dead horse. However, first impressions can't be overstated, and the greeting is critical… and can often easily be fumbled.

Now you're wondering, "How can it be fumbled? It's what starts every call. The intake specialist should have said it a thousand times."

Exactly. And exactly why it can be mishandled. They've said it a thousand times, so it's lost its luster, comes off as robotic, and there's no enthusiasm.

Consider that you've finally gotten your hands on tickets to a Broadway play – one that's been playing for a while, getting rave reviews, and one that you're very eager to see before it closes in a few weeks. Despite its long run, you fully expect to get 100 percent from the actors with the same enthusiastic and energetic performances that they delivered on opening night. You want your money's worth. You don't want the actors to go into the performance thinking, "We've been doing this every night for months (maybe years), and we're near the end, so we're not going to put as much into it. We've said these lines tens of thousands of times, and we're tired and bored with them now."

Your prospect calling your office has the same expectation. For them, it's opening night. They expect to be greeted with energy, enthusiasm, and empathy. The greeting needs to be inviting, so the prospect feels that just by hearing the greeting and the tone of voice of your intake specialist that they've come to the right place… that they've found the solution they need, perhaps desperately need.

The greeting can be basic and still be very effective: "Thank you for calling ABC Law Firm. This is Chris speaking. How may I help you?" Everything said, the tone with which it's said, and the rhythm assures the caller that you want to talk to them, you want to help them, you want them to schedule an appointment and become a client.

Consistency counts. You've spent a lot of money to get the phone to ring. Don't let the call derail as soon as it's answered.

That may seem easy, but trust me, getting that consistency can be challenging. I've heard plenty of intake specialists go off script right off the bat with the greeting. It seems too long to them, so they shorten it. "ABC Law Firm, Chris speaking" is not at all an open invitation to the caller to feel comfortable and assured that ABC Law Firm can help them with their need for legal representation or advice.

Or perhaps the intake specialist is somehow uncomfortable with the greeting, so they fail to answer according to the script. You'll need to set the rules regarding the greeting and cannot have your intake specialist(s) deciding that they're going to do it their way. Consider what the average opportunity call means to your firm. $1,500.00? With a mishandled greeting, you've potentially just lost that revenue.

After asking, "How may I help you?," it's time to pause. There's a lot riding on every incoming call, so the person answering that call has to be focused on the call and ready to listen – and listen closely – to what the caller says next. Let me reiterate that if you are using the receptionist to handle intake phone calls, you are setting your firm up for failure. This call is effectively a sales presentation and the person delivering it cannot be distracted… no sign language or gestures from anyone standing nearby, no putting something in front of them or on their desk while they're on a call. You couldn't effectively present your case in front of a judge with similar distractions, and as we've already covered, this job is as important as that.

After the pause, it's time to slow down and listen. The greeting is the transition to prepare to listen, so the greeting is actually as much for your intake specialist as it is for the caller. No matter how many times the greeting is said, there can be no autopilot, and in preparing to listen, the intake specialist can relax, making the caller feel exceptional… and important!

Your intake specialist will have the CRM system open and ready to document what the caller is saying. They're going to get "Mullins-ized" and follow the ten-point check list to navigate the call efficiently and effectively. They're going to smile when answering the phone because that translates directly to what the caller hears. The caller cannot see body language, but they can definitely hear it, and that makes smiling during the call very, very important. The caller is going to be wowed by the experience!

> ***Take time to pause…***
> ***and really listen!***

Who's Calling?

The next step is to get the name of the caller. Believe it or not, a lot of the intake specialists we coach in the Law Firm Conversions™ Training Program struggle with this. They feel like they're being pushy when we tell them to ask for the caller's name. However, for the most part, the prospect on the other end of the line doesn't perceive it that way.

When you ask for the prospect's name, you're controlling the conversation and continuing from where you left off with the greeting. It helps build the relationship and helps build trust. It allows you to subsequently use the caller's name, and that's definitely a way to build trust and rapport.

There is a right way to ask for the caller's name. After listening to their comment or question (in response to "How may I help you?"), it's very natural to continue, "I'd be happy to help you with that. May I ask your name?"

Again, tone makes a difference… as does a smile when you're asking. Your tone is sort of like a friendly hand on their shoulder, guiding them through the call and reassuring them that they've reached the right place.

Names: Use 'Em

In his book, *How to Win Friends and Influence People*, Dale Carnegie wrote, "Names are the sweetest and most important sound in any language."

You've asked for the caller's name, so be sure to use it!

"Thank you for calling ABC Law Firm. This is Chris speaking. How may I help you?"

"Are you accepting new clients?"

"I'll be happy to help you. Yes, we are. May I ask your name?"

"This is Mary."

"Fantastic, Mary. Let me be the first to welcome you to ABC Law Firm."

Maybe "fantastic" won't be the right word for you and your firm, but you do want to start off with a positive word in addition to using the person's name. Pay special attention to the next phrase: "first to welcome you…." You're automatically assuring the caller that they're already in, you're accepting them, and they're welcome. You are laying the important groundwork for them to make the appointment. Not only that, you're working to ensure that they keep the appointment.

That phrase – "Let me be the first to welcome you…" – sets your firm apart and will dazzle the prospect. How many firms do you think handle calls this way? With the right tone and rhythm, we're changing the process and controlling the call. In effect, you are reassuring the caller that they've made the right decision to call your firm, and you've also probably moved them away from any procrastination they may feel about making an appointment. A lot of people have a difficult time making decisions, so when they've finally decided to call, you can pull them right in with that important welcome.

Using the caller's name shows you're listening, and it solidifies their level of trust and continues to build the relationship.

The Why

Now it's time to ask, "What prompted you to call today?" This step is at the crux of the caller's problem. They're going to share their emotional pain and why it was important for them to call today. This is the point at which you must continue to build trust and establish a relationship, turning the call into being about them and focused on them by identifying their problem and assuring them that they made the right decision. Again, phrasing matters. "What prompted you to call today?" puts the focus on them.

Listen to what they say and document it for use later in the conversation or in subsequent conversations.

Repeat the Problem

Here's where we'll employ PAS – Problem, Agitate, Solution. The prospect needs to be reassured that you "get it." They're opening up to you, so you have to make them as comfortable with you as you can and continue to build trust.

Restate the problem, then agitate it to add a sense of urgency.

In repeating the problem, you'll need to stay focused and on track, and by repeating the problem, you're agitating it a bit. You discovered the real problem in the previous step, and now you're repeating it back to them in their words, so you want to introduce a sense of urgency. If they're initially calling to ask if the firm is accepting new clients, that might not seem urgent to them. They know it's important, but….

If you make it sound like the typical call you get every day, you're not adding any urgency. However, when you add some tone of urgency, you're beginning the agitation process. Without that, it's not going to seem that important to the caller – you will not have struck a nerve, so to speak – so they may not make an appointment or then actually keep the appointment.

So from the top of our sample call:

"Thank you for calling ABC Law Firm. This is Chris speaking. How may I help you?"

"Are you accepting new clients?"

"I'll be happy to help you. Yes, we are. May I ask your name?"

"This is Mary."

"Fantastic, Mary. Let me be the first to welcome you to ABC Law Firm. May I ask how you learned about us?"

"On the internet."

"Okay, Mary, what prompted you to call today?"

"Well, I was injured in a car accident. I was hit from behind. My husband doesn't think I'm being treated fairly."

"I see, Mary. You're saying that your husband… what's your husband's name?"

"Jim."

"So you've been injured in a car accident in which you were hit from behind, and Jim is concerned about the way you're being treated now? Have I understood that correctly?"

You've reiterated the problem in the caller's own words with a tone of concern to start to agitate the problem. You're changing your tone to add some urgency, and at the same time, continuing to build trust using the caller's name.

Provide the Solution

Having restated the problem and agitated it, it's time to get to the heart of the matter – providing the solution. That is, making the appointment. Remember, no matter how talented you or any other attorney in your firm is, until you speak to the prospect, there's no chance to generate revenue. Your intake specialist has to secure the appointment instead of allowing a caller to suggest they'll call back.

While your intake specialist has to be pleasant and polite, they must be focused on first ensuring that the prospect is the right fit for your firm and then scheduling the appointment. Ending a call with a scheduled appointment is the first step toward putting money on your firm's bottom line.

You have to ask for the appointment, and for efficiency, there should be an up-to-date, preferably automated calendar with two or three appointment times available. Taking too long to find a time slot is unprofessional and gives the prospect time to change their mind. Reiterate the problem, re-focus on the urgency, and suggest an appointment time.

"Mary, didn't you say that you and Jim don't think you're being treated fairly? ABC Law Firm focuses on personal injury issues, so the sooner we can meet, the more quickly we can resolve this for you. Can you come in tomorrow at 10:00?"

Secure Contact Information and Learn More

It's important to notice that we first secured the appointment before asking for contact information. The prospect is already being treated like a client. Asking for contact information too soon in the process is not the best way to build trust and further the relationship.

> ***The appointment is the solution.***

Ensure that the information you request is what is needed for the first appointment but nothing further. Asking for too much too soon comes off as intrusive. Remember, you're building a relationship. You don't propose marriage on the first date.

Once you have the contact information, there's another important question to ask. As I've said, the whole point of marketing is to get the phone to ring, and now that you have the prospect on the phone, you have the opportunity to leverage your marketing to an even greater degree: "How did you find us?"

That answer obviously allows you to delve further into your marketing efforts to determine what is working best to get the phone to ring. In addition to getting an appointment, this is the next most critical aspect of the incoming call.

With that said, I need to circle back to reiterate how critical the position of intake specialist is. This person has to be able to focus and concentrate on this call and this call only. That ability is critical to the success of your firm and is the difference between profitability and shuttering the office. You simply cannot have the person answering these calls juggling two or three people standing around their desk waiting to speak with them or remind them that the copy paper supply is low. They cannot be responsible to answer another incoming call. Without singular focus, this call and this prospect can quickly and easily fall through the cracks. Lost opportunity and lost revenue. ***This is a sales call.***

Posed correctly and with the right tone, asking how a prospect found you continues to build the relationship and the level of trust. You're not being nosy; you care enough to ask.

Recall how I told you that if you were not reviewing your call reports, you were wasting money. The same is true regarding the answers to this question. It's critical to share this information with the staff or company handling your marketing. It is the easy answer to reveal what marketing strategies and tactics are working! Of course, you'll want to do more of the same; however, this also isn't carved in stone and tendencies change, so this must be an ongoing question included in your incoming call script.

Use the closing to continue fostering the relationship.

Close Properly

You've secured the appointment and you've discovered how the prospect found your firm. You aren't done yet. How you end the call helps ensure that the prospect keeps the appointment and walks through the door as scheduled. Just because everything in the call went smoothly to this point doesn't guarantee that.

"Okay, Mary. You've made the right decision in calling us today, and we look forward to seeing you tomorrow at 10:00. Mary, this time has been reserved just for you to meet with Mr. Smith."

Pause, be quiet, and wait to hear her response.

"Okay, Mary. Thank you very much. We'll see you tomorrow."

A few important things to note in that closing exchange: Using Mary's name, thanking her again, and reiterating the appointment. To that you can also add: "Do you have a pen handy to write that down, Mary?"

"No I don't. I can remember it."

"Well, I can wait if you'd like me to."

You are reinforcing the relationship you're building, and the more trust the prospect feels, the more likely they are to walk through the door as scheduled.

Once again, the end of the call is not the end of the process. Documentation and then reviewing what transpired on the call is important to continue building opportunities. Share this information with those on your team during weekly meetings. Remember, it's a sales call, and there should be no stigma attached with that idea. Nothing ever happens in the world until someone sells something. When the phone rings, you have to "sell" the appointment.

Listen to recorded calls (provided that's legal in your state) to inspect what you expect. Make sure that your intake specialists are staying on script and not getting too far into "diagnosis mode." That's your job when the prospect arrives for the appointment. Honestly, I've listened to recorded calls that other clients have provided, and I've heard team members suggest:

- "You don't really need us."
- "I'm on lunch right now and can't talk."
- "I'm going to give you the name of someone else. You should call them instead."

I certainly wish I was making these up, but I'm not. I've run across intake specialists who are judgmental, think the caller is faking, or simply are completely apathetic. Every call can make or break your firm. Inspect 'em!

(Note: I've included the 10-Point Script Outline Cheat Sheet™ in the Resource section.)

Stressful? You Bet!

The job of intake specialist can certainly be stressful. As I've said, it is critical to provide your team with breaks, and here are a few strategic stress-busting exercises that will go much further in helping them de-stress than water cooler chat or perusing social media. I strongly encourage you to encourage your team to employ one or all of these:

Stretch: Feel better immediately without even getting out of your chair. Slowly bend forward, then lean back, twisting your spine in both directions. Standing, slowly reach for the ceiling while inhaling, then bend and reach for your toes while exhaling.

Self-massage: For stimulation and relaxation, vigorously massage your head, neck, face, hands, and feet.

Eye Palming: Rub your hands together vigorously until hot, then place them over your closed eyes for soothing energy.

Breathe: Squeeze out all the air from the belly up, then inhale, fully expanding the abdomen, rib cage, and upper body. Pump the breath in and out forcefully from the belly to stimulate internal organs and glands. Feel the breath passively without controlling it.

Relax: Elicit your "relaxation response" by silently (or audibly) repeating a word, sound or prayer, ignoring all other thoughts. This internal focus can reduce muscle tension, blood pressure, and anxiety. Focused mind exercises produce physical body results!

Balance: Lean forward and back, then side to side, reducing movement until you're still and balanced. Center your awareness deep within the belly.

Get Grounded: Feel your connection to the earth.

Autogenetic Programming: Repeat these positive statements in the first person, present tense:

- My forehead feels cool.
- My limbs feel heavy and warm.
- My heartbeat feels slow and quiet.
- I feel completely relaxed.

Mirrors

In addition to having intake specialists post scripts or the 10-Point Script Outline Cheat Sheet™ in their work spaces, I also recommend using a mirror at the desk as a reminder to smile before answering every phone call. The smile can not only be heard, it immediately improves the mindset of the person answering the phone.

There is also a case to be made for using mirrors in other areas of the office besides the rest room. Hang one in the cloak room and break room, so employees can see how they look when entering or leaving. In my former organization when we were faced with a turn-around situation, I used this mirror technique. Additionally, I posted slogans (We're going to win. Nothing is impossible to an indefatigable mind. We've got the guts, let's prove it. How many are you going to sell today?) around the office. Later, we took to writing the slogans on the face of the mirrors. Every morning, a new slogan appeared with the sole purpose of convincing our employees that they could make the sale and get the business, no matter how much others were struggling. Eventually, the mirrors were placed alongside the door frame, so it (and their own reflection) were the last thing they saw before stepping out to greet customers.

Does it work? I'm happy to share that it was during the worst of the "depression" days that all sales reps quadrupled their incomes.

A mirror is a great tool to double check the look you are showing clients, even those that are on the phone. While they can't see you, they will definitely hear a smile every time.

Answer the Phone!

- A consistent greeting is critical. Each person answers the phone the same way every time.
- Despite the repetition, the greeting can never sound old or stale. Remember the analogy to the Broadway show.
- Get "Mullins-ized" and follow the 10-Point Script Outline Cheat Sheet™ on every call.
- Always ask for the name of the caller… then use it!
- Once you understand the problem and repeat it using the caller's own words, you can add urgency by agitating their problem a little bit because you are going to provide their solution.
- The goal of the call is to secure the appointment. You won't bill any hours if you don't speak to clients. You won't speak

to clients if they aren't making appointments.

- Never end a call without having the appropriate and accurate contact information.
- Ask how the caller found you and then be certain there is a process with which to share that information with the marketing department. That's the only way to accurately ascertain which marketing tactics are working.
- Use the close to further solidify the trust you've established and continue building the relationship.
- Be certain your intake specialists take breaks throughout the day to de-stress.
- Use mirrors!

Chapter Six:

Hiring, Retaining & Training

Employees very likely represent the greatest overhead to your firm, including salaries and benefits. You've invested a lot in them, training them so they represent your firm as you desire. It will come as no surprise that the cost of employee turnover is also incredibly high.

According to estimates, the total cost of losing a single employee can range anywhere from 30 to 150 percent of the annual salary. On top of that, the full-time voluntary turnover rate is about 11 percent. Those statistics can combine for a very negative impact to your bottom line. You want to hire the right people and then recognize their worth. This is never more important than when it comes to your intake specialists. Let me reiterate: If you think of them as "just a receptionist," that's exactly what you are going to get. That's the way they'll also think of themselves, and they won't be very invested in their position with your firm. The result? A revolving door – a very expensive revolving door.

Clients love our hiring system! Attorneys: Learn more about it.
Visit https://www.intakeacademy.com/contact-us/ to receive .

Let's look at how to stop that door from turning. That's key to boosting your firm's bottom line and enabling you to grow. I've already been preaching to you about the need to balance your marketing expenditures with your expenses involving your intake specialists. There must be a balance. Spend considerably more on marketing and you won't have enough of the right people answering the phone when it rings. Fail to spend enough on marketing and you'll have staff sitting around waiting for the phone to ring.

The same is true of your recruitment expenditures. If you skimp on spending time and effort to hire the right people in the first place, you'll end up paying the high cost of turnover on the other end. Make the right hire and offer staff the chance to really grow and build a career in your firm and you are on the path to profitability and overall growth. There's a real shift in workforce mentality. People are looking for organizations that provide the chance to learn and grow rather than simply clocking in and collecting a paycheck. If you create those opportunities, your staff will be far more engaged with your firm.

Employee engagement occurs when there is an emotional and intellectual commitment.

Employee engagement goes beyond simply having happy or loyal employees. True engagement occurs when there is an emotional and intellectual commitment by employees to the firm. There is no doubt that employee engagement provides a competitive advantage. Equally important, this sort of engagement also reduces turnover and stops the expensive revolving door. In fact, surveys have shown that the turnover rate is lower than average (eight percent vs. 11 percent) at those companies that are deemed “best employers” (e.g., those that foster employee engagement).

In addition to running a law firm, you are also in the people development business. It behooves you to take the time to recruit the right people in the first place and then keep them.

Turnover Cost Considerations

To calculate the real and total cost of employee turnover, you need to examine the numerous areas that are affected by a single resignation or termination. Top and bottom lines are both affected, and the recovery process is painful for both you at the management level and the entire staff.

The simplest cost to calculate is advertising. Each time you must replace a staff person, you must advertise the availability of the position. There are countless ways to do that and some are better than others: newspaper ads, direct mail, job fairs or booths, online sites, chambers of commerce or other types of referrals. Next, you must calculate the time needed to create the ad and the advertising strategy. An online site may not have an associated cost (i.e., free listing), but then you or someone else at your firm is left weeding through the countless resumes that may flood in, most of which will lack qualifications or otherwise be a poor match for your firm.

To get your final costs, you'll have to consider the cost of your time (or the salary of the person responsible) for the recruiting effort, track the hours spent, figure the hourly cost, and you'll have that part of the equation. Add to that the direct cost of advertising, and you'll have the real cost of recruiting for a position due to turnover.

Next, there's interviewing time. Each time you interview, whether it's formal or informal, on the phone or in person, it's costing your firm money. You're spending time (aka money) when someone gets the mail (traditional or electronic), reads resumes, responds to inquiries, checks references, and discusses the candidates and position with internal team members. Again, consider the salary of that person to determine the hourly rate for this part of the hiring process. Don't forget to calculate in the time spent by others on second or third interviews. Now you have the time cost. You may also incur other direct costs, like taking a candidate to lunch as part of the interview process.

There are plenty of line items to consider when calculating the high cost of turnover!

You find the perfect candidate, and they accept the position. Great. Now we're getting into an area where costs become a bit harder to isolate and calculate: training. Training costs money. Perhaps you have a human resources staff that handles the hiring process and the initial training. In the case of an intake specialist, they'll hand the new employee off to your existing team for more specialized training. There will be plenty of questions to answer, and if there are not, chances are you didn't hire the right person in the first place! Asking questions shows engagement, but it takes time to answer them. In the case of an intake specialist, they may be "shadowing" an employee for a few days or weeks before they are ready to begin answering calls on their own. Those are days and weeks in which they are not directly generating revenue (i.e., closing sales and scheduling appointments) on their own. Plus, there is the cost of time spent by your existing team answering questions and providing guidance rather than spending time on calls.

Also consider ***your*** time that is lost to the rest of the team during this process, especially if you are handling the recruitment process and interviewing. You aren't focusing on their successes and challenges. You lose track of current and future projects. You may become stressed, overwhelmed, and perhaps a little grouchy. As the leader, you're setting the tone… and it's not one in this case that you want your other staff to emulate. Like it or not, they're looking up to you and modeling you. Remember: How you treat them is how they're going to treat clients.

I've seen this happen in many firms. When the team leader is involved elsewhere, the team also loses focus, and attitudes can take a turn toward the negative. Without a leader, a team struggles to act cohesively as a unit. With a gap in coverage due to turnover, it typically falls to the remaining employees to cover the slack until a new hire is not only made but also until that person is trained and fully up to speed. The way your team treats each other then becomes the way they treat clients – bad attitudes, bad service and all. That is exactly what you don't want, and it's a cost of turnover that is difficult, if not impossible, to calculate. Regardless, it's expensive and can quickly result in lost clients and lost revenue.

Turnover always affects workload for each member of the team, if not the entire firm. Whenever you have a new hire, you almost automatically shift job responsibilities around at least for a time. You may also make the mistake of shifting a responsibility to a team member who is not really equipped to handle it. There is also then a cost incurred in that employee's inability or resulting errors. Engaged employees will dive in and take it in stride. They may be out of their comfort zone but also may not speak up about that or ask needed questions. Workload increases generally bring with them a plethora of problems and errors. Problems and errors negatively affect your bottom line. They can also negatively affect employee morale, leading to sick time and requests for time off. Without managing that, workload exponentially increases, and the next thing you know, there's another resignation on your desk and that revolving door is starting to spin.

A "bad apple" can and often does spoil additional employees; don't let that happen.

The Bad Apple

When it turns out that you have an employee who is not performing up to par (perhaps you took my advice and inspected what you expected to learn about the problem), you really need to take quick action. An underperforming team member can become a "bad apple" that really can spoil the whole bunch. I assure you, ignoring a problem employee only allows the problem to get worse, and their bad attitude can and will affect your whole team. If you fail to take action with a "bad apple," your good and valued employees will start heading for the exit… and that's the last thing you want.

If you have a concern about how an intake specialist is handling their job, don't wait. Take action immediately. An intake specialist is a salesperson, and they have the power to positively or negatively affect your firm's bottom line!

It won't get better or change on its own, but of course, you already know that. You've got to jump on in right way and state it like it is. Here are some steps you can follow to address the problem:

1) Prepare before you say something. Know exactly what you want to say and why. Write it down. Have your own script and talking points.
2) Pick a day and time to have a one-on-one meeting. If you've been reading *Law Firm Conversions™* newsletter, you'll already be familiar with this process. Attorneys: go to ***www.IntakeAcademy.com*** and schedule your free 15 minute call with Chris.
3) This should be a positive conversation. You want to reiterate to your intake specialist sooner than later what your expectations are and what the problem is. You want to help them improve and succeed.

4) Agree to what's next. How will you both proceed now and what corrections are expected and by when?

> ***Take time to learn what makes your top performers tick. You'll discover the best "employee DNA."***

5) Understand that the solution may be additional coaching, training, and/or role playing, or perhaps the conversation will be enough to get the employee back on track.

The sooner you have this conversation, the greater your chance for improvement and to avoid having a "bad apple" really turn into a toxic employee. Taking the right corrective action quickly helps you avoid a termination and the ensuing high cost of turnover.

Hiring Well

We've just covered some really tough aspects of managing employees. In reality, no one enjoys terminating an employee, and most people don't even want to have a corrective conversation. We've also covered the ridiculously high cost of turnover. The best solution to avoid all of this is to hire well in the first place… and then build employee engagement and treat your staff like the professionals they are.

So how do you hire well?

First, evaluate the really good employees currently in your firm. Pay close attention to your top performing staff, regardless of their position in the firm. What personality traits to do they have? Where are they from? What is their work history? The answers to these questions will lead you to the “employee DNA” that you’ll want to replicate. After all, they are your top performing folks.

Also, consider the culture in your firm. Your top performers are thriving in this culture or they wouldn’t be top performers. Your culture also plays a part in developing “employee DNA.” There may be a perfectly good professional who, for whatever reason, doesn’t “fit in” and cannot “work and play well with others” in your firm’s culture.

Ask your top performers how they developed their good habits. What’s their secret? (Also, read my monthly newsletter, *Law Firm Conversions™*. Each month we do a personal interview with a Sales Hot Shot [yes, your intake specialists are salespeople] to find out what makes them so successful. Read each interview with a highlighter in hand, and you’ll soon know exactly what to look for when you’re recruiting and interviewing candidates. For your convenience, I’ve included one of these interviews in the Resource section at the end of the book.)

You’ve heard that “birds of a feather flock together.” The same is true with your top performing employees. When you need to hire, start by asking them for referrals of friends or family members they have who may be interested in employment with your firm. You’ll be leveraging that “employee DNA.”

Likewise, keep an ongoing list of personality traits in your poorer performing employees. When you’re dedicated to keeping your eyes and ears open and documenting and tracking employee profiles, you’re going to have a blueprint of who you should hire and who you should avoid.

My Experience

Most of the really good salespeople/intake specialists I've worked with have grown up in a family business in which parents were entrepreneurs and kids worked in the business after school and during the summer. I've also seen a lot of successful intake specialists who have experience in the restaurant industry – as wait staff or bartenders.

Other hard-working environments from which to recruit candidates include jobs in which they deal with the public and difficult or unhappy customers. Most of these types of jobs have demanding bosses – landscapers, cleaning companies, manufacturing, retail – all with a proven history of working really hard. Folks who play sports are also goal-oriented and competitive. I've found they become top performers in the workplace as well.

Also, consider some of these types of interview questions:

- What are your goals?
- Are you a team player? Great, please share some examples with me.
- What is the last goal you achieved?
- How did you achieve it?

These questions are actually more important than any level of sales success or experience in any industry.

I do suggest investigating personality tests to measure if they can sell, if they will sell, and if they will close appointments in your firm with your prospects and clients. There are predictive indexing tools that clients can research and use; however, I've already created a blueprint method with which I've had great success.

Ongoing Coaching

Once you've hired well, it doesn't end there. Please recall the statistics and information I shared with you at the start of this chapter. The cost of turnover is ridiculously high, and employees want to work for an organization in which they have the chance to learn and grow. With that in mind, I'll share the secrets you need to know to coach your intake specialists to be winners.

> ***Attorneys, to learn more about the blueprint I created, visit www.IntakeAcademy.com/contact-us/ and schedule your free 15 minute consult with Chris.***

1) Stick to the script! Many times the intake specialist can get comfortable in their own routine. They start to feel confident, which is great, but that can also lead to feeling complacent or lazy. This is normal human behavior. I compare it to myself and losing weight. I lost the weight I wanted to because I was committed to doing so and followed specific, proven steps (the script, if you will). After several months of changing my habits and behaviors, I became complacent, thinking, "I've

got this. I can do it without 'the script.'" Before I realized it, I Slipped Back into Old Bad Habits and Behaviors™. In no time, I'd regained the weight.

When your intake specialists create their own phone script instead of using the proven 5-Step Relationship Sales Conversion Script with which they've been extremely successful, they've lost focus on what works. Don't let this happen. The proven script that works is your best friend and influences prospective and established clients to set and keep appointments – what they wanted in the first place when they called your number.

If you get lazy about this and allow your intake specialists to deviate from the script, you run the big risk of missed appointment opportunities and missed revenue and profitability. Scripts work, so hold their feet to the fire about using them.

2) Use a script, test your script, and keep using the one that works best.
3) Practice how to use the script over and over again. Teach them how to sound, how to use their voice as a tool, their tone, their inflection… all without sounding scripted!
4) Make sure your team knows everything about your firm before they get on the phone.
5) Provide a list of common objections with the correct answers available.

6) Practice answering objections. Each time you prepare to launch a new marketing campaign, ensure that your team is aware of it and the types of calls it may generate along with the objections that might be raised during those calls. Encourage them to get excited about the new calls they'll be receiving. The phone is revenue, so everyone in the firm should be happy when it rings!
7) Create testimonials that are appropriate for your firm that your team can quickly refer to. This helps build their confidence as well as demonstrating to prospects that you are the solution to their problem. (Ensure there is no breach of confidentiality!) It is important to remind your team often of all the success that your firm is having.
8) Coach your team on how to use these testimonials. You can't simply give them to your staff and say, "Use these." Demonstrate how they can weave different stories into their conversations.
9) Provide ongoing coaching, motivation, and recognition. This is a must because you are dealing with people. If you want to foster employee engagement, coaching, motivation, and recognition are the best ways to do it. Coaching and mastermind groups work for you; it will work for your team, too. Chris Mullins and Law Firm Conversions™ Training

Program's in-house certified conversion coaches all become members of your team.

10) Daily pop quizzes are a great way to keep your team of intake specialists focused, moving forward, motivated, sharp, excited, and knowledgeable about your firm.
11) Develop ongoing contests and bonuses. Keep score publicly for all team members to see.
12) Do the math: Track and talk about sales numbers (scheduled and kept appointments) daily with your team.
13) Teach your intake specialists how to focus on one call at a time. Visualizing is a great tool for staying focused on the next call: "Think about Mary, the next prospect to call. What does she look like? How can you be of service to Mary? How can ***you*** solve Mary's problem?"
14) Create a voice message script. Create an outline for the messages your team may have to leave. Again, hold them accountable to ***use the script***. Create scripts for everything you do.
15) Provide headsets that work for your team. They provide speed and efficiency, so it's easier for your team to navigate through the call, and they cut down on fatigue.
16) Observe your team as they make calls. Listen carefully to their tone of voice. How are they doing, really? Watch their body language. Should they be in that position? Are they exuding energy and enthusiasm? Are they okay? Do they need a break?

17) Teach your team to use good listening techniques by paying attention to the tone, the voice, the breathing, and background noise of the clients.
18) Teach your team to use the CRM (customer relationship management/case management system) that you have, so they can take full advantage of ***all*** its features. Instruct them on taking and keeping detailed notes on each call, especially documenting the exact language and vocabulary your prospects and clients use.
19) Again: Stop treating your receptionist, your intake specialists, and case managers as low-level employees! Your inbound calls are critical. You spent a lot on marketing to get that call to come in. That inbound call provides the very first impression of your firm. First impressions matter. Pay attention to how your phone is being answered and monitor calls to ensure you are capturing all opportunities. Set your team up to win, not fail. They want to win. Imagine just for a moment that your receptionist and intake specialists don't show up for work. Now what?
20) Change your mindset and decide that your receptionist and intake specialists are critically important to your firm. Roll out the red carpet and treat them as the integral part of your team that they are. When you do that, you can stop dealing with turnover and its costly implications. Integrity flows from the top down.

How you treat your staff is how your staff will treat your prospects and clients.

21) Monitor all team members that use the phone. There is simply no way around this important task. Inspect what you expect! And this must be done from a positive point of view. The purpose is to listen to calls to identify all the great things that are happening and reward those so that they're repeated. You'll also be able to identify the areas that need tweaking and do that quickly so problems don't escalate. Your team's acceptance of this strategy depends on how you break the news to your staff about this new process. ***Monitoring and critiquing calls is the fastest way you can grow your firm and improve your bottom line.***
22) Teach self-critiquing. Your entire team must know how to critique their own phone calls and provide you with feedback about their self-diagnosed results.
23) Implement a bonus plan (commission-based plans work best) that rewards these key employees to schedule more appointments with clients most suited for your firm.
24) Have fun. Don't give up! You can do this!

Accountability

I've been stressing the need to monitor because without doing so, you will have no idea what is happening when that phone call – the one you spent marketing dollars on to make ring – is answered. Yes, monitoring really matters. However, it doesn't end there. If you monitor without then holding your staff accountable, you're wasting your time and ultimately your marketing budget. If you are not holding staff accountable, you will never grow your firm and, in fact, will be on the slippery slope to taking down your shingle and closing up shop.

You cannot simply assume your staff is doing things correctly. If that's your assumption, you're on your way to allowing "the inmates to run the asylum." If you aren't monitoring and holding staff accountable, I assure you, they are going to start making their own decisions about what they are going to say on the phone and how they are going to do things. They may get too relaxed with prospective clients, being ***overly*** friendly, letting their hair down, so to speak. That quickly results in them losing their authority and professionalism.

If you fail to hold your staff accountable, you're wasting your time… and a lot of money.

I've actually heard intake specialists at law firms make their own judgments about the prospect on the line, believing that they're faking the situation, that they deserve what they've received, and that they don't really need the firm. I've literally heard: "I'm on lunch right now and can't talk." "I'm going to give you the name of another firm and think you should call them instead." I am not making this up!

Similarly, I recently called a large electronic retail chain that's branded around the tag line, "Thank you for calling XYZ. You have questions, we have answers." A huge amount of money – millions, I'm sure – was spent building that brand. It might be a lengthy greeting, but they say it like clockwork. When I called, the greeting I heard was, "Thank you for calling XYZ. How can I help you?"

I decided to call him out on it. "Don't you usually say, 'You have questions, we have answers'?"

His reply: "I think I like it better the way I'm saying it."

Groan. That's a crack in their branding foundation… the one they spent millions to build. That crack can lead to the whole thing crumbling because one employee, then two, then the whole store's staff, then another store decide not to stick to the script. Yes, without monitoring and accountability, employees will make their own decisions on what they want to say and how they want to say it. Yes, sometimes you'll have to micromanage, and yes, you'll always have to watch the details and provide ongoing coaching in weekly sales drills.

There is no way you can make your telephone do the work it's designed to do in your firm if you, as the attorney/managing partner/owner, are not staying on top of your staff. You need to be able to hold them accountable for goals that you want them to achieve on a daily, weekly, and monthly basis, so you need to set specific goals that can be measured.

With inbound calls, starting with you and trickling down through any other levels of supervision or management, you have to ensure that you're tracking inbound calls, know the dates and times of calls, what kind of call came in, what action was taken, and who has the lead now. Where did the lead go once the call came through? This also includes voice mail on the rare occasion you allow a call to land there.

Hold your staff accountable for tracking calls on a regular basis and know what happened to each one of them. Have weekly sales drill meetings (same agenda every week), having your staff recite what they did the previous week for scheduling appointments: "Here's my goal for the upcoming week – I plan on closing x-amount of appointments, and here's how I'm going to make that happen." Everyone on your intake staff participates. There is no excuse for lapses, and you must make this happen.

This is also the time to determine what is and what is not working in regard to your marketing. The folks answering the incoming calls hold that answer. You can't measure what's happening with your marketing if you don't know what's going on when calls are answered. If you don't have a system in place for communicating this critical information and a system for goal setting, review, and accountability, start now. You don't have to make it perfect to implement it, but you do need to begin to teach your staff that you are moving forward with this process and changing things.

Let me share another example of the importance of monitoring, reviewing, and critiquing calls that come into your firm and it really goes to the heart of customer service. Not long ago, I called a large hotel chain that I frequent and at which I have a rewards number. When I called to make my reservation, they're trained to answer the phone a certain way, which is good, and to always ask for my rewards number, which is great. I typically don't have that handy, so I always ask if they can look it up.

> ***Good customer service always lands on the bottom line. Great customer service is the impetus for real growth.***

Once they have my record in front of them, they can clearly see how many points I have amassed and if there are any specials or bonuses coming to me as a result of being a member in their program. Not one time have I called to make a reservation and heard, "Wow, Ms. Mullins, you are only 5,000 points away from <insert bonus here>, so please continue to stay with us!" That would be great customer service.

I've had enough experience with this hotel chain to know that I should ask, "By the way, do I have any bonuses or benefits coming based on my points?" After a few minutes of them researching, it turns out the reservation I was making turned out to only cost me $12.50 because I was only 1,000 points shy of a free night, and I could buy those points for $12.50. Now, while I was happy for that outcome, I would have certainly been far happier had it been offered without me having to prompt for it. Maybe the person at the call center didn't offer it because I wasn't at the total for a free night. Perhaps they thought they were saving the hotel money, but they had that backward. When they offer to save me money, they're leveraging their rewards program because they are bolstering my loyalty in staying with them on future visits. In essence, this employee potentially stepped over a dollar to save a nickel.

Additionally, they could have ended the call better by asking me if I had any other reservations I needed to make… and this would include the names of other hotels in their chain included in the rewards program of which I may be unaware. In fact, soon after, I had to make another reservation under just these circumstances – I didn't know Hotel Y was affiliated with Hotel X since the names were different. When I called, I was greeted with "Let me be the first to welcome you." Does that sound familiar to you? Didn't I just teach you that in an earlier chapter? Of course, that greeting impressed me! Only when she prompted me about the rewards program did I realize the affiliation. If this company offers any type of bonus program for reservations scheduled, the person who answered my first call missed out. The second call certainly epitomized great customer service, upselling, and fully knowing all of the services.

I took the time to share this example because good customer service, no matter if it's in the hospitality or legal industry, always, always, always lands on the bottom line!

Recognize – Reward – Motivate™

If you want to make your job managing people easier, you should read this section very carefully! If you want to improve your employee engagement, Recognize – Reward – Motivate™ is the answer. Yes, you want to monitor and hold your staff accountable, but the very reason you are doing that is really to catch them doing things right rather than doing things incorrectly. When they're doing things right, recognize and reward it, and you will be motivating them to continue to do things right and continue to improve. That builds their career and your firm's bottom line simultaneously.

We touched on peer recognition earlier, and now it's time to revisit it in greater detail. It's great to be recognized by "the boss," but it's even more powerful to be recognized by peers. Peer recognition gets the best ROE – Return on Effort™. I want you to create a company-wide recognition program, and it's easy. When an employee catches another employee doing something right, they fill out a "kudos form." You can give it a creative name, like ABCD: Above and Beyond the Call of Duty, or something similar if you want… or "Kudos" works just fine, too. The kudos form goes into a ballot box. I suggest you have several of these boxes in different areas of the office.

At the end of the month, a team of designated managers reviews the forms and selects several from each area. The forms are posted on a public bulletin board along with certificates. The certificates then go to the employees after a month on display. This may sound a bit hokey to you, but I assure you it works. What is important is the peer recognition more so than the certificate. There have been companies that have used an old bowling trophy and even a rock as the "reward" that is passed from one employee to another with the kudos form taped to it! Employees who received it were proud to display it, no matter what it looked like.

Catch your staff doing things right; then recognize it and reward it. Create a peer recognition program.

It starts with you as the attorney/managing partner/owner. Add a daily task to your schedule: "Catch someone doing something right and point it out." It doesn't have to be huge. The benefit comes from the recognition and repetition of the recognition. For example, you notice a staff member helping another, smiling more, closing an appointment on the phone, trying harder, checking on a client in the waiting area. You need to do this every day. Soon it will catch on, and your team will start recognizing each other as well.

Don't be fake about this. You must believe it and act it with your words and body language. Remain positive, use positive language, rephrasing any negative language from others into a positive. Constantly recognize individuals daily, and catching people doing things correctly and pointing that out will motivate them to want to do more of the same. They'll start searching for ways in which they can get more recognition. That's basic human nature.

Coach and monitor on a weekly basis. Start with those folks who are behind on goals or in need of extra training. Give them a lot of attention with specific, how-to steps on what they can do differently to improve. Show them how to do it and search for areas in which they may be doing well and reinforce those, sharpening the axe.

(See the Resource section for the Quick Guide for Your Weekly Sales Drills™ to follow to make these meetings more effective and productive.)

Improving Positivity

There are specific actions you can take to improve the positivity of both you and your staff. Working in a positive environment is good for employee engagement, and what's good for employee engagement is good for your firm's bottom line.

Set Goals: The sense of achievement that comes from meeting a goal comes from dopamine, a neurotransmitter that helps control the brain's reward and pleasure centers. To get regular dopamine hits, have goals that give you more opportunity for success.

Get Inspired: Regularly review and post inspirational quotes from great thinkers, athletes, entrepreneurs, etc. You'll find that when you need them most, one of these will pop into your head.

Monitor Your Mood: Compare how you feel before and after a task using a scale of -5 (stressed/cranky) to +5 (calm/elated). Be mindful of your score and take the steps needed to stay in the +4 or +5 range.

Positive Imagery: As with inspirational quotes, invest in positive imagery to hang throughout the office. There are plenty of companies that can help you out with these sorts of items, like Successories.

Improving positivity around the office will motivate everyone to set and achieve goals, improve scheduling appointments, maintain great attitudes, and provide stellar client service. What you focus on expands, and positivity is certainly worth expanding in your firm.

Answer the Phone!

- If you think of your intake specialists as "just a receptionist," that is exactly what you are going to get. The result is an expensive revolving door and ongoing turnover.
- Skimp on your recruiting efforts and you will continue to pay the high cost of turnover.
- Employees who are truly engaged with the firm tend to stick around and are your top performers.
- To calculate your turnover cost, you must consider the actual costs (e.g., advertising) plus all the time that each person in the firm invests in the process, like retrieving both traditional and electronic mail, reading

resumes, and scheduling and conducting interviews.

- Training takes time, so add all that time (and its associated cost) to the cost of your turnover calculation.
- An employee who is a “bad apple” really can and will spoil the whole bunch unless you take quick corrective action.
- Avoid the high cost of turnover by hiring well in the first place!
- Find out what makes your high performers tick and use that as a guide when searching for new employees. Capitalize on and leverage “employee DNA.”
- Once trained, to keep employees engaged and performing well, ongoing coaching is a must!
- Inspect what you expect and hold your staff accountable to it – be it scripts, processes, procedures, etc.
- Recognition, reward, and motivation are the keys to increasing employee engagement. Catch employees doing things right and recognize it, and they’ll start striving to do even more things right.
- Create a positive atmosphere and culture in your firm for your employees and yourself.

Chapter Seven:

Continue to Sharpen the Axe

With the right people on your team, allowing you to stop the revolving door and avoid the high cost of turnover, and a great peer recognition program in place, it's time to continue to sharpen the axe.

No one can improve – or even maintain the status quo – without practicing… and continuing to practice. As an attorney, you are continuing to hone your own skills and expertise. Every athlete with designs on improving must continue to practice. The same is true for actors and musicians. No one can rest on their laurels, or their performance will erode. Even when it feels like second nature, practice is a must. Without continuing to sharpen the axe, of course it gets dull… and then it fails to do what it is designed to do. So, yes. Your team must continue to practice.

They must also learn to self-critique. Be forewarned: At first, your team of intake specialists is going to be timid, perhaps even downright resistant, when they learn their phone calls are going to be recorded for training and quality assurance. When you decide to do mystery calls or record calls (again, when permitted by your state law), you may get push back, but as long as you're honest, positive, and supportive of your team, it will become easier for them to hear their own recorded calls.

In fact, engaged employees will become experts at critiquing their own phone calls, able to point directly to areas in which they can improve. This continual review is the practice they need to truly continue to hone their skills, becoming more and more proficient with every passing week.

You want to have a system in place that holds your team accountable for daily (or at least weekly) self-critiquing and scoring themselves on their own performances. When you do this (and it could be part of your weekly sales drill), your appointments will soar, your revenue will increase, and your bottom line will grow to everyone's benefit. Whether you have an outside expert, like Law Firm Conversions™, monitoring your calls or reviewing recorded calls and teaching your staff how to use the phone as the important sales tool it is or creating your own internal ongoing program, this must happen. Remember: What gets measured gets done. What gets measured improves.

Whether it's athletics, music, acting, practicing law, or answering the phone, practice, practice, practice!

Self-critiquing

The word "critique" sounds harsh and carries negative connotation for some people, assuming that a critique is always going to bring with it negative feedback. Reiterate to your team the actual definition of the word: "a detailed analysis and assessment." While "criticism" comes from the same etymological root, a critique does not necessarily equal criticism. Nor should it. Again, you want to make this a positive experience for your team, and the critiques are there to analyze and assess what is also being done right and well!

Here are the components that should go into a program to effectively self-critique:

1) The intake specialist(s) should bring their digital recorder to the sales drill and play at least one call to be critiqued by the team.
2) Self-critiquing: The intake specialists should listen to their own calls at least three times a day and complete a checklist of the areas they critiqued in each call according to the script. If your script has the recommended ten points, they should analyze how they did on each point on a call and submit their self-critique score sheet. (Note: A copy of this checklist is included in the Resource section.)

A critique is an analytical assessment. It does not equate to criticism.

3) Each team member should share what they feel was great with a particular call and why it should be repeated, and they must all share what didn't work well and why.
4) Each person in your firm who touches the phone should participate and bring the script with them to the sales drill. In fact, every person who touches the phone for any reason – even to prevent a call from going to voice mail – should be recorded and participate in the critique sessions.

5) Conduct at least one role play session in your weekly sales drill. Pick one scenario, plan it in advance to make it as real as possible, and have everyone take a turn playing parts.
6) Track your incoming calls… all of them! Discuss the results and review these metrics in your weekly sales drill.
7) Review PAS (Problem, Agitate, Solution) each week and how to apply this tactic.

Reverting to Former State

You may think I'm over-emphasizing the need for ongoing training and weekly sales drills, but I assure you, if you fail to put this in place, things will quickly revert to their former state. When that happens, you cannot grow your firm and, in fact, will be leaving money on the table, losing revenue, and struggling for profit.

I know this to be a fact, so I've created the "Don't Slip Back to Old Bad Habits" Maintenance Program™.

Attorneys, to learn more about this program, visit https://www.intakeacademy.com/#video intake training session to improve conversion, and schedule your free 15 minute consult with Chris.

Keep in mind that when your phone rings, the caller (whether a prospect or existing client) wants to speak to a live person. When calling a law office, they ***expect*** to speak to a live person. They did not pick up the phone and begin to dial thinking, "I'm calling with my problem because I want to recite it to voice mail. I'm sure the voice mail can help me." They want to do business with you and to discuss their problem with you because you can offer the solution.

Continue with training and reinforcement to prevent things from reverting to their former state!

Consider yourself as the consumer. You know how incredibly frustrating it is after you've finally decided to pick up the phone and make the call to get voice mail or to have to deal with the all-too-familiar menu: "Press 1 for x, press 2 for y, press 3 for z." That simply will never work for a professional office!

What is your average transaction size? I'll assert again that you'll be leaving that money on the table when a call goes to voice mail. You must put a system in place to avoid this, especially during normal office hours. Do whatever you need to do to ensure that a live person answers every call.

Whether you use Law Firm Conversions™ for our "Don't Slip Back to Old Bad Habits" Maintenance Program™, here are the basics to cover:

1) Always use a script. Always. Every call. This will keep you focused on the call and the steps to take to lead the caller down the path of scheduling the appointment.
2) Welcome the caller with "Let me be the first to welcome you to ABC Law Firm." This is truly a brilliant phrase because it tells the caller they've

already been accepted. It changes their mindset, and they being to think, “Wow. I’m in. I’m not just calling to ask questions. I need to make an appointment.” Your competitors aren’t doing this, so you will certainly stand out with this greeting.

3) What prompted them to call today? Drill down to the real emotional pain and employ the PAS (Problem, Agitate, Solution) technique.
4) Ask for the appointment! Ask for the appointment no matter what. I understand that not all calls may be the right type for this; however, when your intake specialists keep this result in the forefront of their mind, it will become more automatic as soon as the opportunity presents itself. This is an important habit to get into and maintain. Every single call you take is really training for the next call to come in.

   Focus on asking for the appointment (selling) to prevent lost opportunities. The bottom line: Getting the appointment is really what it’s all about. You’ve spent thousands of dollars and huge amounts of time to get the phone to ring. Don’t drop the ball when it does by failing to get the appointment! The appointment is really why the prospect called in the first place, and they know that.
5) Get contact information for follow up or to provide them with a helpful newsletter or report.

Accurate contact information will prevent future lost revenue opportunities.

6) No diagnosing over the phone. No diarrhea of the mouth. Just sell the appointment and get them through the door to ask their questions.
7) Your voice must have a sense of urgency for all calls; otherwise, it won't seem important to the prospect to set and keep the appointment.
8) Don't forget: How did you find us? Without that, you cannot really leverage your marketing.
9) Set daily appointment goals to continue to sharpen the axe and to compete with yourself one day to the next. Goals keep you from falling victim to complacency.
10) Catch each other doing something right every day. Leverage your peer recognition program.
11) Have fun! One call is always training for the next.

Answer the Phone!

- Practice, practice, practice. No matter what you do, you will never get better without practice!
- Have a system in place for self-critiquing. This is an important part of practicing.
- Critiquing is not the same as criticizing. It is an analytical assessment of performance. Stress this to your team.
- Follow the steps I've outlined for your self-critique process.

- Without continual review, practice, and adjustment, things will always revert to their former state.
- Let a call go to voice mail and you leave the value of your average transaction on the table rather than in your coffers.
- Use the "Don't Slip Back to Old Bad Habits" Maintenance Program™ to keep your staff improving and your firm growing.

Attorneys, to learn more about the blueprint I created, visit www.IntakeAcademy.com/contact-us/ and schedule your free 15 minute consult with Chris.

Chapter Eight:
Sabotage

It's a harsh topic; however, I would be remiss if I didn't cover this with you. At this point, you may be thinking that I've beaten the proverbial dead horse on many of the topics that I've covered, repeating them unnecessarily. As I mentioned, I've been doing this for over 25 years and am called The Phone Sales Doctor for a very good reason. I feel I must cover this topic because, unfortunately, sabotage is everywhere, in every industry, and in every business. You may have already seen it or seen signs of it in your own firm and have chosen to look the other way. (If this is true, I urge you to go back and read the section about the "bad apple" in the chapter on Hiring, Retaining & Training.)

Here are some red flags that indicate sabotage, and yes, I have literally heard them all:

- "We don't get questions like that; we don't get calls like that, so this program must not be good and we don't need this training."
- "I knew it was the mystery caller, so why should I bother trying? I'm really too busy for this stuff."
- "We're getting plenty of appointments. Why do we need this?"
- "I'm not a 'salesperson.' I won't do it."
- "I don't believe in scripts, so I won't use one."

- "I've been here 10 years. I know what I'm doing."

We covered employee engagement earlier, and it is important to have employees who care about your firm both emotionally and intellectually. Your employees are not showing up every day simply to perform a function – like answering those important phone calls. They want to have a sense of accomplishment, a boost to their self-esteem, and a sense of community… just like you do every day.

> ***Sabotage is more prevalent than you think. It exists in most organizations.***

Staff will become disengaged and unhappy when the boss doesn't really know them or seem to care, when they don't know or understand why their job matters and how critical it is to the success of the firm, and when they do not have a way to measure how well they are doing and the effect of their job on others.

Sabotage can actually reveal itself in two different ways. There are those who resist change and the "you-make-a-difference" attitude you are trying to communicate. They'll say something like, "This isn't rocket science and this is certainly not the center of my life." You may hear that directly or overhear it. Either way, it's a "bad apple"! Fire them, if you dare.

On the other hand, sabotage can come in the form of complaints that the approach is "too touchy-feely" for a professional workplace. "There's too much love in this room when we're cheering each other on." If others laugh, you can laugh along with them, but don't back down. I'm certain anyone who complains about receiving kudos is 1) in the minority and 2) lying to themselves and others.

Stick to your guns and continue to recognize, motivate, reward, hold accountable, train, coach, and yes, fire, when you realize you've made a hiring error or have a "bad apple." The success of your firm is riding on it.

Horror Stories

You may think your firm is immune to sabotage or at least to poor telephone answering, but we've heard it all at Law Firm Conversions™, including during audits of professional offices just like yours.

- "I'm on lunch right now. Can I call you back?"
- "Truthfully, you can get the same _____ from XYZ for a lot less."
- "I think it's expensive, but if that's what you want…."
- "Okay, if you don't want to make an appointment right now, we're not going anywhere, so call us back when you're ready."
- "All of our services come down to money."
- "We're actually on the more expensive side, in fact, much more than most… but you didn't hear that from me."
- "I'm helping someone else right now. Can you call back later?"

- And finally, a call transfer to another person in the office with a faulty 'hold' button: "I have a beast of a woman on hold that I'm transferring to you. Good luck."

Perhaps things at your firm aren't quite this bad, but how bad does it have to get and how long are you going to wait until you make improvements? There is no time like the present.

Pizza Shop Piling on the Cheese

You must have systems, training, and monitoring in place along with a script and a guide on your inbound calls and for the way your team handles clients. Here's a story about an experience I had at a pizza shop, and while a pizza shop is a far cry from a law firm, the moral of the story is the same. Without a system, processes and procedures, and monitoring in place, employees can and will take things into their own hands, according to what they believe, and things will quickly run amok after that.

> ***Employees will make up their own rules and do things the way they want.***

Yes, your team ***will*** make up the rules as they go along, and that's not their fault. When this happens, it's your fault for not providing them with the training, support, and recognition for doing things right. It's your fault for not providing the steps they need to take to fix what they might have done and to correct their approach that does not align with what you want them to do.

This is a recipe for disaster, for having poor employee morale and a revolving door, and for ultimately closing up shop.

So back to my pizza experience. My local pizza shop offers a reward program. A good marketing idea! You know the type: You get a card and receive punches for each order, and after you accumulate the specified number, you get a free pizza. It happens that the program is geared toward ordering small pizzas. I'd happened to order a large, and when I handed over my card for the girl to punch it, she punched it twice. I'd ordered large pizzas before and had only previously received a single punch. So I asked, "Oh, are we supposed to get two punches for a large?"

Her reply: "No. I do it because it just doesn't seem right to me to do it the way they want."

Ugh.

What she is really saying is that she doesn't support what the owner wants. Her personal beliefs of what may seem fair, right or wrong, are getting in the way, so she's making up her own rules. Sabotage can carry with it a really negative connotation. I suspect this employee thought she was delivering good customer service by giving me two punches toward a free pizza instead of one. Regardless, whether she meant to or not, she was sabotaging the owner's efforts to be profitable.

Even in the name of good customer service, sabotage derails your efforts and negatively affects the bottom line.

Again, I know you're running a law firm and not a pizza shop, and you probably don't have a rewards program. That's not the point. The point is that this is a common practice – employees making up their own rules and doing things the way they want – in all businesses from the front desk to the back office.

Here's the sabotaging phrase you probably have heard in your firm: "I've been here for over <insert your favorite number of years here>. I understand how to answer the phone and communicate. I can tell when the caller doesn't want me to ask for their name or contact information or really doesn't want to make an appointment. They just had questions."

That last part: "They just had questions." That's the equivalent of me getting two punches on my pizza card. It's sabotage, no matter how well-meaning the employee thinks they are.

If you think someone on your team isn't doing the same thing, you're wrong. Someone is making up their own rules in your firm… unless you've already remedied that problem by monitoring and holding staff accountable. If you have, good for you! If you haven't, you need to get this done now. For those firms that aren't watching over employees' shoulders, aren't holding them accountable, and aren't checking up on them, they're losing buckets of money and lost revenue opportunities. Their bottom line is nowhere near where it could or should be.

It's a Disease

Throughout my years in business, I've uncovered a disease more deadly to any firm than a stock market crash or widespread economic downturn. This disease spreads rapidly and can destroy your firm in the blink of an eye. It's a disease that many owners/attorneys/managing partners fail to recognize, despite plentiful warning signs and symptoms. It's a disease that can best be described as "destructive behavior that is allowed to exist and grow by management inertia." This disease doesn't discriminate. It quickly touches all departments in a firm.

That's the bad news. The good news is that it has a cure, so pay close attention.

During training and consulting contracts that we get through the Law Firm Conversions™ Training Program, I've dealt with all sorts of businesses and people, both "virtually" and in person. Most often, the first issue that comes up with one of my clients is interpersonal relationships and getting along with others in various departments. If I've been hired to provide advice on increasing sales, I'm predominantly spending time with the frontline salespeople.

In one particular training class, I spent more time listening to complaints from salespeople about other team members and managers than focusing on the problem – a lack of sales growth. With this particular client, employees were thinking of quitting, people were frequently calling in sick, or taking more time off than usual. Sales were suffering, feelings were being hurt, employees' baggage was being brought to the surface, and worst of all – paying customers' needs were going unfulfilled or not being met to the fullest.

Unfortunately, this is not terribly uncommon, and when this sort of combustible situation exists, the frontline managers hear about it. Even more unfortunate, most of those managers chalk it up to normal complaining and assume employees will get over it. Wrong! It's a case of management inertia. When an employee brings a problem to the manager's attention, they'd better be listening. Now, I know there are squeaky wheels in every organization. I'm not saying the employee's comments are 100 percent accurate. I'm not saying the person venting to you has no responsibility in the situation. I am saying that if someone takes the time to speak with you, there is ***something*** brewing.

Bad attitudes are highly contagious!

There's a common theme that I've seen in these situations. See if any apply to your firm:

- Lack of company communication as a whole.
- Management doesn't involve employees in ***any*** decisions.
- Too many layers of supervisors, managers, or directors.
- Lack of (or non-existent) meetings to share ideas and receive solid feedback.
- Overworking employees; pressuring salaried staff to work far in excess of 40 hours.
- Micromanaging.
- Having a "This is business, so do what you're told or we'll replace you" attitude.
- No training. Employees have to sink or swim on their own.

- Handing off supervisory responsibilities that you as the owner/managing partner/attorney should be doing.
- Failing to train supervisors how to be effective managers and leaders.

The Disease Is Contagious

Your firm may offer the best compensation, benefits, perks, and a nice office, so you believe that's enough. You're wrong. Don't get complacent. Compensation and benefits are not what keeps people. These things do not inspire engagement. Employees want to know that firm leaders are listening to them, helping guide their careers and grow, and caring about them as people. In your position, like it or not, you are also a manager, psychologist, mentor, teacher, detective, and financial planner. And you thought you were only an attorney!

The disease of "destructive behavior" can happen at the management level also. Watch your words because, yes, your staff has feelings. If something comes out of your mouth that shouldn't, make it right, apologize, and accept responsibility. In your position, you have the power to affect someone's self-esteem either positively or negatively. Keep in mind that how you treat your staff is how your staff is going to treat prospects and clients. We all have responsibility with our words and attitudes.

Attorneys, to learn more about the blueprint I created, visit www.IntakeAcademy.com/contact-us/ and schedule your free 15 minute consult with Chris.

In the case of the example I shared, the managers were guilty of adding fuel to the fire by not taking the appropriate action and taking that action quickly. Whether it was because they lacked their own appropriate management training or were simply very ineffectual leaders, I don't know. And that doesn't matter. The end result was the same.

Managers must pay attention to their teams. Get to know them. Learn from them. Yes, they can teach you because they're on the front lines and in the trenches every day. Let them vent… to a point. Teach them your mission and vision for the department and the firm as a whole. Find out what their personal and professional goals are.

Get to know them as individuals – their strengths and weaknesses. Provide training and coaching to shore up the weaknesses and areas that need improvement. Promote lifelong learning! Give them responsibilities that will complement their strengths.

It's so much more cost effective to invest time, money, and energy with your internal clients (aka your staff), so they will take care of your external clients. If you fail to do so, you will be subjected to the revolving door and the ongoing high cost of turnover. With that, you will constantly struggle. You will never grow. You will never be profitable.

Care about what you have; teach and demonstrate respect, ethics, and compassion.

Answer the Phone!

- Don't kid yourself. Sabotage exists in every firm, company, organization, and industry.
- Sabotage can take the form of "This isn't rocket science and this isn't the center of my life" or "This stuff is too 'touchy-feely.' This is a business."
- Employees will take it upon themselves to do things their way or the way they deem most effective.
- In some instances, employee sabotage occurs because the employee thinks they are being fair to the client and providing good customer service.
- A bad attitude is a disease that will cripple any firm, company, or organization.
- Bad attitudes can also flow the other way, from management on down and is equally crippling.
- Understand that your role as the owner/managing partner/attorney goes so much deeper than that if you are going to be an effective leader.
- Invest in what you already have and make improvements rather than subjecting your firm to the profit-killing revolving door.

Attorneys, to learn more about the blueprint I created, visit www.IntakeAcademy.com/contact-us/ and schedule your free 15 minute consult with Chris.

Chapter Nine:

The Next Step

Having reached the end and gotten to this point, I hope I have helped you understand two critical factors. First, I hope I have convinced you about the importance of your intake specialist(s) and why, if you want to stop wasting your marketing dollars and instead have more revenue landing on the bottom line, you must truly invest in this person or this team. Depending on the size of your firm, a true call center would provide the ideal solution to attaining and enjoying a greater number of conversions.

I'll remind you that a failure to convert when the phone rings means you are flushing away the money you spend on marketing. The job of marketing is to get the phone to ring. It's the job of your intake specialist(s) to convert that inquiry to an appointment on your calendar and ultimately billable hours. Again, I'll also assert that the job of your intake specialist is as important as yours or any other attorney's job in your firm. If your intake specialist can't or doesn't convert a lead to an appointment, you or other attorneys in your firm will never get the opportunity to speak with the prospect!

Attorneys, to learn more about the blueprint I created, visit https://www.intakeacademy.com/contact-us/ and schedule your free 15 minute consult with Chris.

It takes both initial and ongoing training to establish an intake specialist or a full-blown call center, and that is not your area of expertise, nor should it be. You are no doubt busy enough already. With your new found education about proper intake and phone techniques, you're realizing that outsourcing this critical function makes a great deal of sense.

And that brings me to the second critical factor as we come to a close: Along with my team at Law Firm Conversions™, we are here to help you to the extent you choose, whether that is an initial assessment of your staff's performance or complete and ongoing training. I'll add that there is no better source than me and my team for this function that will lead to greater numbers of conversions for your firm. Again, they don't call me The Phone Sales Doctor™ for nuthin'!

If at this point, I haven't convinced you or if you possibly still believe that your staff is doing an adequate job (although I doubt that or you wouldn't have picked up this book in the first place), as the managing partner or owner, I invite and encourage you to take one simple step: Immediately schedule your free, 15 minute consult at www.IntakeAcademy.com.

With your free, three-part strategy call, we will begin the process of helping you to fully leverage your marketing budget by converting more prospects into profitable clients that make sense for your firm. At the end of the strategy call, I truly believe that you will understand why my straightforward and proven approach is the solution you need to stop wasting marketing dollars and generate greater profitability.

The choice is certainly yours, and I'm certain you will make the right one!

Resources:

Resource #1:

Attorneys: To further engage with Chris Mullins, click to schedule your free, 15 minute consult at:

www.IntakeAcademy.com

Resource #2

Phone Conversion Script

During your free, three-part strategy call, you'll learn about our advanced 5-Step Relationship Sales Conversion Script™, but here's a sample "basic" script to get you started:

1) Greeting. *"Thank you for calling XYZ business. This is Chris speaking. How may I help you?"* [All done with a smile that says "We're here for you."]

2) Get the name of the caller. Just ask.

3) Use the name of the caller during the call: *"Fantastic, Mrs. Smith, let me be the first to welcome you to XYZ."* Basically, you're assuming the appointment, the sale, the invitation to visit.

4) What prompted you to call today (identifying the problem/emotional pain)? Listen, document and share this information. *"Terrific, Mrs. Smith, you made the right decision in calling XYZ today."*

5) Repeat the problem to be sure you understand, and they can be reassured that you get it. Repeat back what they said in their own words.

6) Provide the solution — make the appointment. Sales opportunity #1. [Refer to your "how to" schedule sheet.]

7) Get contact information — Sales opportunity #2, always at the end of the call, now that you've got the appointment and have established some trust. If, for some reason, you're not able to make the appointment, you still want to ask for this information, so you can stay in front of them to remind them that you're here. Example: *"Mrs. Smith, since you're not ready to make an appointment today, I'd like to send you our free customer newsletter. Let me jot down your mailing address and I'll get last month's issue out to you right away."*

Now you have their mailing address and you can stay in front of them via your mailings, post cards, etc.

8) How did you find us? Listen, document, and share this information.

9) Close properly — *"Thank you once again, Mrs. Smith, you made the right decision in calling us today. We look forward to seeing you tomorrow at 2:00."*

10) Listen for opportunities and share the information with the team. Remember, you're always selling. Assume the sale (the appointment) by moving right into scheduling the appointment regardless of the reason they called. Your phone represents an appointment (a sale) each time it rings.

Resource #3

Self-Critiquing Checklist

Your intake specialists should follow this checklist when self-critiquing:

- ✓ Make sure your advanced 5-Step Relationship Sales Conversion Script™ is on colored paper, so you can find it easily.
- ✓ Have your script in front of you every time you're on the phone.
- ✓ Best to turn the script into a printed pad (i.e., multiple sheets of the script in a pad for easy note taking; have your local printer create them for you).
- ✓ Every phone call you're on is a training call for the next call on how to effectively use the 5-Step Relationship Sales Conversion Script.
- ✓ While you're on the phone with a prospective client, using your five steps, check off each step as you apply them.
- ✓ Repeat the steps above for every phone call you're on!
- ✓ By repeating this exercise, you're building habits and behaviors for becoming an expert at applying the five steps to each prospect phone call.
- ✓ As a result of this process, you are self-critiquing and scoring yourself from one call to the next.
- ✓ At the end of the day, take all of your scripts (one script/call), give yourself a score on each (e.g., if one call only scores 3 steps out of the 5, you'd score a 3. The highest score is a 5.) Determine the average script score for the day.

- ✓ ***What you focus on expands; what gets measured gets done.***

I absolutely guarantee that this exercise alone will move your conversion needle in the positive direction every day!

Resource #4

A Quick Guide for Your Weekly Sales Drills™

1) Take a look at your notes from your monthly Phone Sales Training Program and phone critiques to put together a list of what's most important to discuss in the sales drill.

2) Be careful with any criticism that you want to share because it can be difficult for many folks. The delivery style and the person sharing the information are important to consider. This step can make or break the very important lessons to be learned. You know your folks, so you decide.

3) Weekly sales drills are all about sales, it's a bottom-line meeting about the numbers, the math. Discuss possible closing of cases for that week, month, etc. You also use this time to share successes with everyone, bringing an objection they're having difficulty with to the sales drill. They can all jump in and role play for the right solution. Example: Incoming calls as a result of your lead generation efforts, number of scheduled appointments, number of kept appointments, and number of new clients.

4) The TONE of this weekly sales drill needs to be positive, upbeat, how to, focused, educational, team action oriented

and short (no more than 45 minutes, and shoot for 30 once you get going with a few). No food at this meeting; it's business, all need to be focused.

5) Topics – Discuss at least one topic that has to do with improving your bottom line. Be sure to focus on PAS (Problem, Agitate, Solution) with each client. You also want to do role playing to practice your script, objections, and difficult phone situations.

6) Do NOT include any housekeeping during this time. Schedule the sales drill for the same day and time each week. Pick a time that you feel would work mostly with your schedule, then schedule it every week in your organizer and have everyone else do the same. A team can help improve the bottom line just as easily and quickly as they can hurt it with poor attitudes like the, "Hey, it's just a job" mentality.

Resource #5

Law Firm Conversion Training Program

Simply put, there is no other program available for law firms that want to convert more prospects into high paying clients. The Law Firm Conversion Training Program is a private, customized, 12-month program where Chris and her team work with your intake team to build strong relationships and ultimately convert prospects at higher levels.

As noted, this proven program has many foundational pieces, yet it can be customized to meet the specific needs of your law firm. Here is a brief overview.

- During each monthly class, our In-House Certified Master Intake Conversion Coaches teach your intake specialists how to convert more prospects using our proprietary 5-Step Relationship Sales Conversion Script™.
- Our proven system focuses on relationships first, business second. We do this by teaching them how to control the conversation, understand and provide empathy, and redirect with compassion when necessary.
- Of paramount importance is our ability to train your staff how to convert qualified prospects into appointments.
- Our 12-month Law Firm Conversion Training Program focuses on comprehensive sales, relationship and communication training, as well as coaching and support to your Intake Specialist team.

In short, we help you make your marketing actually deliver results!

Understandably, The Law Firm Conversion Training Program is not for every firm. To determine if this program can help your firm, the first step is to visit ***https://www.intakeacademy.com/*** and schedule your free, 15 minute consult with Chris.

Resource #6

Additional Resources:

Intake Contact Center: Overflow and after-hours call center for law firms.

International Intake Specialist Week^{TM}: Annual contest for Intake Specialists

Legal Intake Specialist: 90-day, fast track intake conversion coaching program.

Monthly Staff-Only Question/Answer Conference Call

Monthly newsletter:
Click here to get this newsletter

LAW FIRM CONVERSIONS™

April 2018 • Volume 6 No. 4

ISSUE HIGHLIGHTS:

- Runaway Meetings – A Top Time Waster ... Page 4
- Five Absolute Musts for Effective Law Firm Intake ... Page 6

Sales Training In Every Issue: Outside Sales – Inside Sales – Telemarketing – Management

The 3 P's for Success

by Daniel Dumo

"Patience, persistence and perspiration make an unbeatable combination for success."
– Napoleon Hill

While a marketing student about a decade ago, we were taught the four P's in our first year and later taught the seven P's. This categorization made it much easier to remember the variables of what in Marketing parlance is termed the Marketing mix. Akin to the four P's of the marketing mix is what the world-renowned best-selling motivational author, Napoleon Hill, considers "an unbeatable combination for success" and which I prefer to term the three P's for success. These include patience, persistence and perspiration as itemized by Hill in the quote above.

It is my candid opinion that the three P's for success are non-negotiable and are an absolute necessity on the route to success. In as much as these traits are certainly not the only requirements for success, they are irreplaceable.

Success may mean different things to different people. However, for the purpose of clarity and in the context of this write-up, I wish to define success as completing an objective or reaching a goal.

A young person who aims at becoming a millionaire at age 40 and who eventually achieves it within the specified period of time may be considered to have succeeded. Another who dreams of graduating from the university with a degree in law, and who in time graduates with a degree in law has in essence succeeded in reaching his or her goal. Success simply has to do with accomplishing ones dreams, goals and aspirations.

Patience

It was Jean-Jacques Rousseau, the Genevan philosopher, writer and composer who once rightly noted, "Patience is bitter, but its fruits are sweet." This is exemplified in vivid terms in the occupation of farming.

Farmers plant their crops with expectation of a harvest but also with the understanding that they will have to wait for weeks, months or even years, depending on the kind of crops planted. They thus plant their crops and provide the necessary care while they wait patiently for harvest time.

It will be mission aborted and certainly a misnomer should a cultivator of Chinese bamboo trees destroy what he or she has planted (while still below the earth surface) with the pretext that the trees planted are not growing or that they are taking too long to grow. It is common knowledge that the Chinese bamboo takes a couple of years to shoot out of the ground, let alone grow into maturity.

The point of this illustration is to drum home the fact that in life, any accomplishment of significance takes time — sometimes longer than one may expect. This makes patience a necessity, less great dreams are aborted.

Thomas Alva Edison once noted, "Many of life's failures are people who did not realize how close they were to success when

cont. on page 2

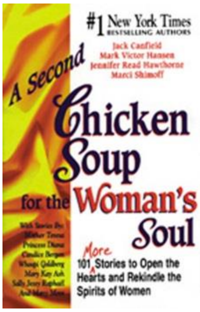
ASK FOR THE APPOINTMENT!

**Note that due to the date of this publishing, some of the contents may be outdated.*

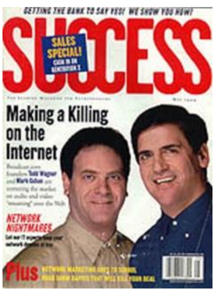
www.IntakeAcademy.com/#video
https://www.intakeacademy.com/articles/ (password = attorneys)

For information on any of these, please contact:
phonesuccessdoctor@gmail.com

Chris has also been published in the following books and magazines:

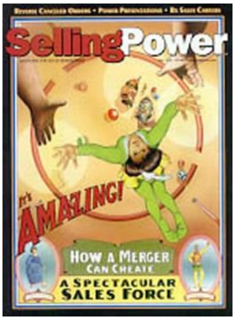


"Police Woman"



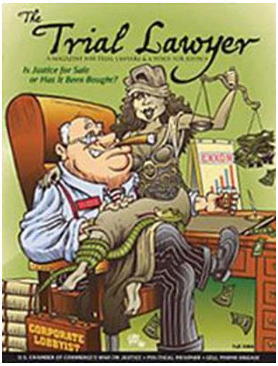
"Woman in Business – Wait it out!"

"Building Your Team"



"Expert Advice: Dialing for Dollars"

"How to manage and strengthen your dream sales team"



Resource #7

Five Intake Specialist Super Heroes
Real Lives, Real Stories of the Unsung Heroes of Law Firms Worldwide

To protect the privacy of our intake specialist heroes, we have not published their real names or firm names. The stories you're about to read are very real and I personally found it to be emotionally challenging to remain composed during each interview. I am very proud of each hero who was interviewed. You are very brave, strong and incredibly gifted individuals. Thank you for this opportunity to step into each of your lives. – Chris Mullins

Chris Mullins Interviews Hero #1

Mullins: So, are you nervous?
Hero #1: A little bit.
Mullins: You'll be fine. It's just you and me. How long have you been working there now? I think you said two or three years?
Hero #1: Yes, two-and-a-half, almost three.
Mullins: Again, we won't publish your name or the name of the firm. Do you remember why you took the job?
Hero #1: Yes, I do. I was actually very excited to come over here to work with people who need help, need our assistance moving forward. I personally like talking to people and trying to help people. Why I really decided to move over… at my last job I was there for five years and I

did enjoy it, but I just wasn't as engaged with clients as I have the opportunity to be here.

Mullins: But prior to that, you were at another business?

Hero #1: Yes.

Mullins: Okay, because you said you moved over. I thought maybe you were in another department or something.

Hero #1: Oh, no. I've always been within this department. My roles have changed a little bit throughout the years. But I've always been within the same area of the firm since I've started.

Mullins: What kind of job did you have before you came to the firm?

Hero #1: I was in insurance sales.

Mullins: Oh, boy.

Hero #1: It's very stressful.

Mullins: Was it all on the phone or did you have to go out on the road?

Hero #1: Not on the road but we did marketing within the city. No out of town travel, but within the city and face-to-face. We do have clients that come in. We had an office. So we had clients that came in and it wasn't over the phone mainly. Our main point of contact was in person.

Mullins: Right. But five years? That's a long time.

Hero #1: Yes. It is a long time.

Mullins: Sales is tough — it's just tough. I think it's tough depending on the business that you work in. Do you know what I mean?

Hero #1: Yes.

Mullins: I know why you took the job. How do you feel two-and-a-half years later about what you're doing now?

Hero #1: I still love being here, being able to help people, talk to people, speak with people. We are making a difference in their lives. Yes, at times it is very stressful as call volume increases, but overall, I do enjoy coming to work. I look forward to being here, being on the phone waiting for the next call, making sure that we're doing everything that we can to help them in the long run. I still enjoy it even though it has been a couple of years. It's never to the point where I dread coming in, although there are some days that are a little more stressful than others. But at the end of the day, I still enjoy working here. And I try to convey that when I work.

Mullins: Okay.

Hero #1: I do like what I do and I think we have a good company that really does care generally about the people we are working for.

Mullins: Let's talk about the difficult stuff. In other words, even for me, I've been doing what I'm doing for 25 years now and I still have days when there's a meltdown.

Hero #1: Sure.

Mullins: It happens to all of us. So what's it like for you? As a reminder for you, the purpose for me talking to you right now is I want intake specialists, front desk receptionists in law firms, worldwide, to read what it's like. The good and the bad for their colleagues and all these other firms to help them feel better about what they do and to remind themselves that they are heroes, that what they do is so important and it shouldn't be taken lightly.

But also I'm doing this book because I want business owners, partners, the principles of the firm to have another opportunity to remind themselves of how critically important the intake specialists are to the practice.

So, what about those days when your worst phone call happens? What's the worst phone call that you've ever had that you can remember? What's that person saying to you?

Hero #1: Well, yesterday was particularly bad and I haven't had one in those in a while. It wasn't me who was speaking with the client, but they were irate. Unfortunately, we were not able to help that particular individual. We are applying for benefits to the Social Security System and they have set specifications on who qualifies and who doesn't. There's no way around that. If they exceed a particular resource for a particular program, there is nothing else that we can do. We're filing it through the federal system.

So unfortunately, for this client, at first when we extended a welcome representation, "Yes, we can help you," we then come to find out we couldn't help him after some other information was disclosed later on down the road. He was very upset wondering why this wasn't brought up to begin with and was cussing on the line.

Mullins: Really?

Hero #1: He wanted to fire us. This just happened yesterday. We had already made up the paperwork so that we could become his representatives. We received it but we were not able to process and actually get that submitted to the Social Security Administration. He just wanted closure at that point because now we're gathering more information. We're getting all of these components in and now we're realizing, "You know what? I'm sorry. We're not going to be able help you after all. We were not aware of XYZ in the beginning. Now that we are, there's nothing else that we can do about it." So, he was very upset.

That was, you know, particularly stressful and, of course, on our end we don't want that to happen. We always want to make them understand that we are trying to help them. There are just some points where we cannot override what the requirements are or what the limitations are on those types of applications.

At the end of the day we were able to get him to calm down a little bit and explain it to him. He did have a good understanding as to why we were not able to move forward for his particular case and help them, so it was ultimately resolved but during that phone call it was very stressful. If I wasn't here, I wouldn't understand either. "You said you can help me. Now three weeks down the road, you're saying you can't. What happened? What changed?" We have to explain that to him and ultimately we did. It was just that the process was a little tedious.

Mullins: It sounds like the phone call took a long time. How were you able to calm this person down?

Hero #1: It did take a long time. What we did was the first individual who spoke with him, the person who got the call, had actually talked to him previously. She had talked to him the day before and she let him know, "We're going to wait for a little bit more information where we just want to be sure that we're not giving you any type of wrong information. Once we get a particular letter, we're going to follow up with you and make sure that we understand the information that you're telling us is exactly what the Social Security Administration has seen."

We want to confirm with the notice that they're going to issue. That was the first day of the call when we were brought the other information. The next day, he called again and the same individual took the call still trying to work it out for him. When she could no longer just speak with the client or relay that information to him, we did have to have a manager step in and help with that call.

Mullins: Okay. For yourself, have you ever had to ask anybody if they've tried to commit suicide?

Hero #1: Yes, I have.

Mullins: We listen to so many phone calls at the Intake Academy. We've heard terrible things with all different clients, not necessarily your firm in particular, but all clients. What's that like when you have to ask that question? How is that for you?

Hero #1: It's very personal. You want to try to make them as comfortable as you can because, for example, I'm a very private person. I would not want to disclose that. I wouldn't want to tell somebody else any type of information I've got on myself. We just want to make them feel with the information they're giving that we are handling this and we are ultimately asking these types of questions to help them. We want to be sure that the applications we are doing for them, this may help quicken the process of an ultimate decision.

Yes, it is personal and we try to empathize with them and make sure that they know we do care for them as a person and that we do appreciate them speaking with us about sensitive topics. In the long run, this is going to be something that is going to help them.

Mullins: So, when you get ready to ask that to somebody that question, it's never easy, right?
Hero #1: No.
Mullins: I'm sure you've had people say, "Yes, I've tried." What about people who say that and they start to tell you their whole story? What's that like?
Hero #1: At times we do get emotional with clients. We want to, of course, be professional, but it does take a toll when these clients are trusting you with their private life, with their personal information. So we try to remain calm, be very sympathetic, empathetic, sincere and, of course, gather the information we need. We don't want to brush them off or rush on to the next subject or next question. You know, take a moment to let them explain.
And there are times where they let you know, "I can't go any further." And that's okay. We're like, "Thank you. You're doing great. I appreciate what you have told me thus far." I'll try moving along to a different subject and then maybe we can come back and feel a little better. I try to make sure that their needs are taking care of.
Mullins: I'm sure that you've had times when people have maybe asked you or looked at you as a resource like, "What should I do? I want to kill myself." Do you ever get people who think that you are going to talk them through a problem like that?
Hero #1: At times they will mention it but, of course, we're not professionals and we do have numbers to give them, aides that can help them. If we think that they are in severe risk, then we can actually transfer them over to somebody that can help them, whether it's 911 if they've

already hurt themselves or a suicide hotline. We have those numbers.

Mullins: Okay.

Hero #1: We don't need to let them know that we are not professionals in that manner but we can help them find the help that they need.

Mullins: But how do you deal with these kinds of phone calls, whether it's people talking about suicide or not? As a person, I know you're doing what you're doing because you want to help people and I understand that and I believe that. But at the end of the day, how the heck do you get through all of those calls and then get in a car and go home to your family?

Hero #1: Well, I try to the best I can… you know, take a deep breath, just relax and try not to let that affect my home life. Of course there are times you need to bend a little bit. Sometimes even just talking with a co-worker. We're all in this together.

Mullins: That's right.

Hero #1: At the end of the day or the next day, we've been trying to do huddles so that we can talk to each other and know that we have peers here that can help each other. We have a very involved management staff as well. In our department we are doing huddles because we find that they help, especially with the type of applications that are very personal. They do give a lot of private information like that and it can be very stressful when they start telling you what they've been through and then they thank you.

Mullins: It's really hard. It doesn't really matter, you know, especially the field that you're in but really, all types of law, even personal injury. The kinds of phone calls that you are taking every day all day long, it’s really difficult. Do you have a family? Do you have children or are you by yourself?

Hero #1: I do have a family. I have two children and so that means I’m with them going outside to get some fresh air. Music helps also. Now that spring is here, starting in the baseball field, just to be outside, be with them and try to let some of that stress and energy out.

Mullins: When you’re on your way to work, do you have a ritual or a routine or something that you do emotionally or mentally to get yourself ready to walk into the building? Or do you go and take it as it comes?

Hero #1: I just go with it. I already know on Mondays that it’s usually going to be our busiest day.

Mullins: Really?

Hero #1: Usually Mondays are the toughest day in the week.

Mullins: Well, I think that you’re amazing. I’m speaking to you because what you do is so important and the fact that you’re part of this book to help other people who do what you do to realize, hey, this is a gift that you have that you’re giving to all of these people on the phone.

You don’t want to take it lightly, but you also need to take care of yourself and make sure that you do the huddle or ask for help or raise your hand or take a break, whatever you have to do. At the end of the day, my hope for you is that you really realize what a gift it is that you have and what you’re doing every day on every single phone call. I’m really proud of you.

Hero #1: Oh, thank you, I appreciate it. You brought up a lot of key points in our Intake Academy training that we are taking into account, you know, the breaks, the time off, the huddles, the grouping, the script is great. These are things that are helping us grow as people, as a firm, as a department and helping us through those tough calls.

Mullins: So my last question for you is what would you say to other intake specialists, because every firm calls what you do something different. Some firms say intake specialist, some say application, some say visibility, some say front desk, reception, call center, client services. There's a different name for all kinds of firms, believe it or not. What would you say to them, the people who feel like they just can't take it anymore and what they're doing is not important?

Hero #1: I would say that is definitely not true. For every one upset client, there are probably 20 that have benefitted from your conversation with them, from you just being there to talk to them, to speak with them, to let them know that they are being cared for. That is what is going to help you in the long run. Yes, there are some days that are more stressful than others, but it's not like that every day. There are a lot more good times than bad.

Mullins: You just keep going. You just keep doing the good things you're doing and keep giving your gift to every person you speak to — even on a Monday. Don't sit back. Stand a lot taller, if you're standing tall now, stand even taller. I think that you're a true leader for your team.

Hero #1: Thank you.

Mullins: And your name will be part of the raffle for the donation. Everybody's name who gets interviewed in all these different practices will be in the raffle. Whoever's name is chosen, we're going to make a five-hundred-dollar donation to their favorite charity in their name.

Hero #1: That's awesome.

Mullins: Keep up the good work.

Chris Mullins Interviews Hero #2

Mullins: I wanted to interview you because not only are you amazing, but you're an intake specialist for a call center that services law firms. The purpose of the book is because I feel that you, all of you folks, that take these phone calls, whether Social Security or mass tort or personal injury, whatever the area of law it is, you're getting those calls. It's really tough not just because of the amount of calls that you get, but mostly because of the type of calls that you get.

It's hard to navigate these calls but it's also hard emotionally for you, let's say, to deal with some of the terrible things that you're hearing and then just have to move on to the next one. I want to shine a light on people like you that do this job because I think if you can share the good, the bad, the ugly — you know, your story — then it will help other intake specialists to realize, "Hey, I'm not alone. I can learn from what that person just said or what I read from them."

It puts a bigger magnifying glass on the intake specialist and makes them become much more important by giving them the spotlight. So, those are the reasons we're doing it.

Hero #2: Thank you.

Mullins: How long have you been taking inbound phone calls for law firms?

Hero #2: I've been working with the company for about eight years, specifically specializing in intakes for about five years now.

Mullins: What can you remember, off the top of your head, that's the worst experience you had with, let's say, somebody being really mean or abusive over the phone to you?

Hero #2: The situations really vary. I try not so much to focus on the bad so it's hard to give a specific idea of when something has happened. I know in our profession we take calls like that on a daily basis. Probably the worst thing that I've ever been through would be somebody who's really upset, but by trying to work with them and understanding their situation, the end result usually ends up being positive.

Mullins: Say you're in the middle of someone yelling at you or swearing at you and calling you names. Does that ever happen?

Hero #2: I've had situations like that but I've usually been able to work through them and end up getting a good result with the situation and so forth.

Mullins: How do you work through them if that happens?

Hero #2: Usually, that's the one thing that people are the most upset about — somebody not listening to them. They have been trying to get this assistance, they've been trying to get help and nobody is responding. No one is contacting them. No one is just listening to them.

I find that by sitting there and listening to somebody and confirming their situation and understanding where it is that they're coming from and why they're frustrated usually ends up with a good result by sitting there and saying, "You know, I understand where you're coming from and I'm really sorry that this has happened and that you haven't heard back from anybody. I'm going to do my best."

I'll generally give them my name and my word that I'm going to do everything I can to try to get them the help that they need right now. Usually when that happens, most people end up being more responsive and it ends in a good result with them saying, "You know, thank you for your help," toward the end of the call when it may not have started out so well.

Mullins: What about you as a person, as an individual, is it hard? Even though you're trying to diffuse the situation, and it sounds like more times than not you're probably successful, but what about you as a person separate from your career, maybe even when you first started your career. Is it hard for you to hear and be talked to that way?

Hero #2: I don't think it's ever easy for someone to be talked to that way. Maybe toward the beginning it used to really hurt. There are days, of course, when you do feel like crying. The longer you do it, though, the more you realize it's not that they're mad at you, they're mad about the situation or something that's happened to them that led up to this situation for them being so upset or so angry that's causing them to call in and be so frustrated.

Mullins: But you know what? Just to kind of interrupt you for a second. I understand all that and I know that's where you've come to. But here you are, maybe you've only been on a job for a year or two. Try to put yourself back to when you first started. Only you'll know, but when you're taking phone calls like that, everybody has good and bad days.

On the bad days, when you used to be or when you still are really emotional about it, it's really hard for you to hear somebody saying these things and then to wipe them away and say, "It's not really me." The days that you're not strong or that you used to not be strong with getting through that, what made you stay in the job?

Now, when I ask that question to people like you, some will say, "To be honest, Chris, I had to keep food in the table." Some will say something totally different. But what keeps you in that kind of job, in that kind of environment?

Hero #2: I really care. I don't know, but I genuinely care about everyone. In this position, there's only so much that you can do to help people, but sometimes just being there in that moment and taking the abuse or sitting there and listening to somebody, you end up helping them. Even if it's over the phone and just hearing that somebody cares. I want people to know that someone does care about them and that they're not alone.

Mullins: Okay. Do you take Social Security calls?

Hero #2: We do take Social Security.

Mullins: Do you personally take them?

Hero #2: Yes. I personally take Social Security Disability intake calls.

Mullins: Okay. So… if I have to ask you to repeat something it's just because you're on a conference call and sometimes it's hard to hear but you're doing a great job. Have you ever had phone calls where somebody would be like, "I'm going to kill myself, or I've tried to kill myself," or anything like that?

Hero #2: I did one time. It wasn't necessarily for the Social Security Disability. But it was in a different type of account. When that happens I just try to stay on the phone with them and I try to get them the help that they need. It ended up getting them to a counselor but that was very scary. It was very emotional to sit there and be scared that someone was going to hurt themselves while you're on the phone with them.

Mullins: What were they saying?

Hero #2: They were stating that they had a gun and that they wanted to shoot themselves. They were saying that, "You know, this is the end. I can't do this anymore." I remember sitting there and in my head thinking nothing is ever so bad that you can't want to do it anymore. You have to stay strong and you have to want to be here. And maybe those things shouldn't have been said but I did tell them, "You know, you need to stay strong. You need to stick with it. Nothing can be so bad that you want to take your life away because then it can't get better. Things always have a way of getting better."

Mullins: The other day I was listening to some real phone calls from some of our clients and the very first thing this woman said when she called this law firm was, "My sister is dying of cancer any day now. I need to get some help." That was the very first thing that she said. Have you gotten calls like that? Maybe not cancer, maybe something else like, "My child was just hit by a car," things like that.

Hero #2: There's one call that will always stay with me but still even the fact that it's done, I do wonder how she's doing. There was a lady who called in on a personal injury law firm. She had a child and her child had passed. It was a very unfortunate situation. Her child was in his teens. She said there was this hole. There were no signs blocking off the property and he ended up going into the hole and the rope broke and he died.

The police department made out like it was his fault that he shouldn't have been there. She was just getting the whole run-around and the whole time this poor lady is like, "I'm just trying to get help." Supposedly that area was considered to be off limits but the signs were missing and nothing had been posted up.

Mullins: When you took that phone call and she told you that story, what was that like?

Hero #2: I ended up getting off the phone with her, I did have to take a moment because I'm a mother and just the thought of something like that happening, I had to take a moment. I had to go back and take a couple of moments to recuperate. I was crying even while I was on the phone with her, I did have tears running down my face.

Mullins: Of course.

Hero #2: For that type of situation though, sometimes you have to take a moment to turn off, regroup your thoughts and then be ready for the next new situation that's coming your way.

Mullins: I get it and I hear you. But how the heck do you do it? Especially if you're in an environment where you get a lot of calls and they're coming at you one after another? How do you keep going? What happens when you get in the car and you go home at night? As you're driving home, are you thinking about everything or did you immediately shut it off? How does it affect you with your family?

Hero #2: Honestly, you have to shut it off. You can't take it with you because if you take it with you, it would just be too much. I honestly just take one call at a time. Every situation has its own demand and if I were to take everything home… I would probably say my stress level has definitely been high since I started here eight years ago. I definitely have a lot more stress, but I just try to take my time to breathe, to refresh and then when I'm home, I'm home. When I'm at work, it's work.

Mullins: When you drive in to work for the start of your day, like when you get out of bed in the morning, do you start thinking about work or do you not think about it until you're in the car or do you not think about it until you get in the building?

Hero #2: I probably say I think about work 24 hours. I don't always talk about it. And I have dreams about work.

Mullins: What kinds of dreams?

Hero #2: Just various different situations, getting that call where you just can't help or can't fix something. Feeling bad about those people who you repeatedly speak with and they're constantly telling you, "Nobody is helping me. No one is giving me a call back." Call center-wise I'd have to say that's probably the hardest thing to deal with because there's only so much that you can do to help them.

Mullins: Right.

Hero #2: And when you speak with them time and time again and you hear nobody is helping them, that's probably the hardest thing that I personally have to deal with on a daily basis. If I could give any advice to a law firm, it'd be just to take a moment and call back clients to let them know that you're still looking into it, that you're still researching, that you're still looking at it and that you care about them versus never calling them back or telling them anything.

Mullins: So, your advice for law firms is to make sure that they have people in place, to just keep calling and communicating even if you can't give the news that someone wants to hear.

Hero #2: Just to communicate, that's all people want. They want to know what's happening. Even if they're an existing client, I know so many firms put so much time and effort into getting those potential clients. But what about keeping their existing clients? Those existing clients are just as important, and not following up or even taking a moment to say, "Hey, I just wanted to check in to let you know I'm still looking into it. But I promise that I'll contact you as soon as I know."

Mullins: Right. Let me ask you this. And don't forget, today – I don't know if you know this or not, but today at 3:00 EST — I think that's probably 12:00 for you guys — is the staff question and answer phone call with me. I don't know if you know that or not.

Hero #2: No, I didn't know.

Mullins: I'll give you the conference line and see if it's okay for you to attend. But it's the staff only question and answer phone call with Chris Mullins. It's for all of our law firms. It's just for staff, the receptionist, the intake specialist — people like you that are handling the calls.

It's only for an hour but they jump on and you don't have to say who you are if you don't want to. It's very informal and you can jump on and ask me a question. You can listen to everybody else. You can help somebody, that sort of thing.

If you had the power to help intake specialists at law firms or call centers… If you were the CEO, the one that could make the decision, what do you think intake specialists need? What service or resource or support or coaching — what kind of help do you think would be great for the intake specialist — what do you think they need to help themselves get through their job? What do you think would be a great idea? Have you ever thought of it?

Hero #2: I think having a general knowledge of the types of people who are contacting you, that's the number one most important thing because you need to be prepared to answer those difficult questions, not necessarily legal questions, but those difficult questions that people are calling in to seek advice. They need that reassurance. They need to know that you are going to help them and that they did the right thing in contacting you.

I personally think from hearing other calls and from seeing and hearing things from other people is empathy. You honestly need to care about that caller. You need to go into it wholeheartedly and try to help them, not just sit there and be like, "I'm going to get the information and do what I have to do."

No, you need to really sit there and listen to them and tell them that you understand and that you do care about why they're calling and not just get the information and get them off the line.

Mullins: For example, 911 has a call center. I don't know if you ever heard me talk about or if you remember me talking about venting lounges, but they have a room that they call the quiet room. And when somebody is on a 911 call, you can imagine those calls, right? If they're on the phone and if they can't take it, if they can't handle the pressure of that call or even when they're done with the call, they can raise their hand, there's always a supervisor that can see them. They immediately go into the quiet room and somebody sits in their place. It's a way for them to get a timeout immediately. So those are things that I want you to think about. Can you do that?

Hero #2: I can.

Mullins: Well, I think you're awesome. I'm proud of you. I wish I was there right now to give you a hug. I was not having the best morning or the best week — I'm human too. My morning wasn't exactly what I had planned it to be until I talked to you.

Hero #2: Thank you, Chris. I appreciate that.

Mullins: My pleasure. Bye now.

Hero Update

Just before we went to press, we received this update from Hero #2:

Good morning Chris,

Here is my answer for the question you asked. Knowledge is power. The more you know about the subject the better you are able to understand what is needed to do a good intake. I feel that providing hands-on learning/training for your team is a must in this field.

Intake specialists should have weekly meetings to discuss situations they've had and get input from their peers. I feel it's important to provide immediate feedback and to have someone there to answer questions along the way. In order to truly understand where someone is coming from, you need to teach your intake specialists to put themselves in the caller's shoes.

I would explain the importance of understanding where your caller is coming from and to imagine how you would feel if this were happening to you. I would tell them to never be quick to judge someone or a situation; you need to have all the facts before coming to a conclusion. I would provide a safe place for employees to recover from hard calls and to take a moment to clear their mind.

I feel that having these items in place for employees would help them succeed and improve the overall intake process for a firm.

Chris Mullins Interviews Hero #3

Mullins: Thank you for this interview. The purpose of the book is I want to shine a very bright light on intake specialists in law firms worldwide.

Hero #3: Right.

Mullins: One of the reasons we want to do this book is because it's just amazing what you do but I don't really feel like all intake specialists realize how wonderful they are or how important it is what they do. I don't think all of them really understand how they positively touch so many lives every single day.

I also don't feel that the lawyers, the partners, the senior level executives in the law firms understand. I want you to know that I take this interview very seriously and together we can turn intake specialists into celebrities worldwide. The people who are going to read this book are going to be intake specialists. People who have been doing the job for years, maybe some that are brand new, maybe some that aren't quite sure if they should take the job or if they should keep the job. Your interview will be helping everyone.

Hero #3: Okay.

Mullins: How long have you been an intake specialist?

Hero #3: Six years.
Mullins: In one location?
Hero #3: Yes.
Mullins: Okay. Try to remember back when you took the job, however long ago it was, what was going on in your life that made you take this job?
Hero #3: Well, I wanted to do something different, to see what other gifts that I had inside, you know, to step out of my box, because I used to be an aerobic instructor and a personal trainer. I wanted to move in another direction. So when I got hired here, it just opened up my world to… how can I say it? The world out there is such a hurting world and I said, "Man, I really love this job. I like to help people."
Mullins: Right.
Hero #3: It really gave me an understanding of how many people out there have problems and are hurting. I thought, "This is a perfect job for me." That's why I stayed this long.
Mullins: Okay. Think about… you don't have to give me specific details or names of anything or anyone, but I know because I've listened to thousands of real recorded calls every month from law firms across the country of all different sizes. I hear all the terrible stories. Think about one of the terrible experiences that you had on the phone with the prospective client. What was their story that just made you hang on for dear life so that you could help them get through it?
Hero #3: Oh, one in particular was a family member that called in. And I tell you what, when I listen to the story, my heart… I actually had to hold my tears back because I had

to be strong for that person. But one in particular was when the person — she was a wife but the brother was calling — was in the building and it blew up. She was burned over 90% of her body and ended up passing away.

But the urgency to gather the information and to get an attorney to assist in this situation, that to me was the most dramatic because the woman had a 5-year-old son. And that broke my heart, you know, so that was the most dramatic.

It was a situation where there was an explosion and her whole body was burned but the thing is that when he called, he says, “You know what? Another family member was with her, and her body ended up blowing up in the air and it was just a horrible experience, you know.” The other person didn’t make it either but the fact that this woman had a 5-year-old son and he had to be told that his mother passed away… Now the little boy does not have his mother.

Mullins: What about when you were in the middle of listening to her brother? How did you keep it together to take care of that call?

Hero #3: Well, when I was speaking to him he was pretty shaken up. He wanted to make sure that we were able to assist with this case and I was with him all the way. I told him, “We’re going to go ahead and assist you. I’m so sorry that this has happened. My heart goes out to you.” I told him I would get an attorney on the phone right away as soon as we finished with the information. I told him that he’s not alone and that whatever we can do to assist him with that situation, we’re going to do. But I had to remain strong even when he was telling me how she was injured and the condition that she was in.

I was overcome with emotion but I could not cry on the phone even though my heart wanted to. I had to remain strong. He was reaching out to me and my hand was reaching out to him. It's almost like I was with him in the experience the whole time. That's how I felt, like I was going through everything with him. We ended up assisting him. I got an attorney to help calm him down, to make sure that we were going to go ahead and assist him. I told him I'm so glad that he called our law firm, that he made the right decision to call. I told him, "Please keep me posted on how you're doing." I always like to put that in there to make it like a relationship like, "We're here, whatever questions you have feel free to call me." And he kept in touch a little bit and then I don't know what happened after that. But I hope that everything went well.

Mullins: When you had the phone call with him, was it one phone call?

Hero #3: It was one phone call and after that he called me several times later and thanked me. And I told him to just call anytime if there's anything else that we can do. He called me about two more times and that was it. But I was telling him that he made the best decision in calling our law firm. He was pretty traumatized.

Mullins: Right.

Hero #3: Granted, he was crying but I told him that we are here for him. I made him feel that we are here for him and I meant it.

Mullins: When you were on the phone, how long of a phone conversation was it, roughly?

Hero #3: Well, in a situation like this because there are a lot of emotions involved, you don't want to rush.

Mullins: Right.

Hero #3: The conversation probably took around, let's say, 20 minutes at the most, and by the time I got an attorney to call him, you're looking at about 25 minutes. Those are delicate calls.

Mullins: Oh, sure.

Hero #3: You want to make sure that you are there with them and you're not rushing them off because the first call is the most important I believe. It's like the first impression. I wanted to make sure that we held his hand.

Mullins: Have you ever had a conversation with somebody that says, "Look, I'm going to kill myself," you know, a suicide type of thing? How the heck do you deal with it?

Hero #3: I had a call like that one time where she wanted an attorney on the phone because she was overcome with emotion. I told her, "You know, ma'am, take a good deep breath. You have to think about your family." I asked her how many children she has, and she says, "I have five." "You have to think about them. You're very important and we're glad that you called this law firm."

She felt better, but she was overcome with emotion. She was happy that she called our law firm. It was a situation we were not able to assist her in because we're personal injuries. But I referred her to where she was able to get some kind of assistance.

Mullins: Here's another question for you. When you wake up in the morning, before you get out of bed, when if at all do you start thinking about work or the types of phone calls you're going to get that day? Do you start when you wake up? Do you start when your feet touch the floor? Do you start when you're driving or do you start when you sit at your desk?

Hero #3: Actually when I start driving to work. I get prepared, go over the script. I do. I say to myself, "How can I answer this question? How can I be more effective this way?" So I start to talk to myself on the way to work. That way I'm better prepared when I'm here. Of course, I say a little prayer so I can assist whoever calls. But I feel that every call is very important. Chris, I do have your rock on my desk and I have a hand reaching out. As they reach out to me, I reach out to them. That's what I think — that they're reaching out to me. Then I'm going to go ahead and reach out to them.

Mullins: So the rock helps you to do that?

Hero #3: Yes, I have a picture in front of my desk of my rock.

Mullins: What about at night time when you're done with work, you've had a long day or a long week. That's hard enough as it is, but they're hard emotional sad kinds of stories that are true.

Hero #3: Yes.

Mullins: How do you shut it off when you go home to your family?

Hero #3: Well, when I go home, everything is in my car. I do think about all the calls that I took and especially those that are heartbreaking. I say a prayer for them. I say, "Lord, help that person, whatever they need. Just be there for them." And I say that as I go home.

When I get home, my husband already has the meal and everything ready and I have the fish and the dog to take care of so they consume my time. But when I lay down, I do think about those people and that's how I actually pray for them. That brings me great peace in my heart that at least someone is praying for them. That's how I cope with it.

Mullins: Well, they're fortunate to have you, for sure. Let's pretend that you are the CEO of the firm. You're in charge, you're the decision maker. You can do whatever you want. If you were the person that could make changes and decisions at your firm to help the intake specialists, to give them more support whether it'd be coaching or venting or breaks… I'll give you quick example. The people at 911, they take calls all day long.

Hero #3: Yes.

Mullins: Emergency calls, like they don't know what kind of call they're going to get either. They work in a call center just like you do. In the 911 environment, if an agent takes a call and they're having a hard time with a call, when that call is done, they can raise their hand and there are supervisors all over constantly. As soon as someone sees their hand raised, they have a room, a private lounge room that's called the quiet room. They get to go in there by themselves and be alone and somebody else sits in their chair to take the calls.

So if you were the person that can make the decision to support or help or guide even more the people who take these calls, what would you do? What ideas do you have? Does anything ever come to mind?

What do you think would be great for a law firm, what service could a law firm provide to actual people like you, an intake specialist, that's on the phone all day long taking these kinds of calls? What could a firm do to help you get through the day? Could they give you a venting session? Could they have yoga in your office? Is there anything that ever comes to mind like, “It would be nice if we had this”?

Hero #3: A treadmill.

Mullins: Why do you say a treadmill?

Hero #3: Well, because I feel that walking on a treadmill for maybe five or 10 minutes kind of calms you down and releases stress. Or just go take a walk. Something that will take your focus out where you can rethink your thoughts, like an area to walk or something like that.

Mullins: You’ve done a wonderful thing here and we’re going to send you a copy of the book.

Hero #3: Oh, outstanding! I hope I was a help to you.

Mullins: You were a very big help, not just to me, but to everybody who’s going to read the book.

Hero #3: Thank you so much.

Mullins: Take it easy. Thank you so much.

Hero Update

Just before we went to press, we received this update from Hero #3:

Chris,

I know that being an intake person is not easy, however the reward of helping someone is enough to put a smile on your face.

I just wanted to add one thing more that came to mind. The way an intake specialist sounds on the phone with care and understanding is very important and this will make or break the call. If there’s a chance the caller will decide to hire the law firm, then how we sound on the phone is a very important key. People are looking for someone to care, to be heard and understand what they are going through. This will determine if the prospective client will consider hiring our firm.

Regarding your question about what would I do if I were a CEO of a law firm? What would I do to help the intake specialists? I just thought of something real cool, the idea for stress release. A room that has a soft sofa, nice pictures, a waterfall fountain on the wall, a fish tank and maybe some soothing music to ease the stress and some good hot tea.

Chris Mullins Interviews Hero #4

Hero #4: Hi, Chris.

Mullins: Hi, how are you?

Hero #4: I'm good. I'm sorry that I'm calling in late, but I was taking case number 67.

Mullins: It's just you and me.

Hero #4: Okay. This has been a tough month. Every other month, I always count the people below me. I've never made it to 66 up until last month. I would always count and I never wanted to be at the bottom. I always try to stay in the middle. Well, up until today, I was number three.

Mullins: What?

Hero #4: I got kicked out to number three today. Two people moved ahead of me, but I have been in third place all month. I was counting so there are more people below me now, instead of people above me. Too cool, huh?

Mullins: That's awesome. I'm proud of you. I'm getting watery-eyed! So, do you know what this phone call is about?

Hero #4: I'm pretty honored, I heard you're going to interview me. I'm amazed. I don't understand why.

Mullins: We're publishing a book called *Intake Specialists: The Unsung Heroes of Law Firms Worldwide.*

Hero #4: I'm honored. I really am! Like I told you before, if I can help somebody else. All the more power to you Ms. Chris!

Mullins: Alright, are you ready?

Hero #4: I'm ready.

Mullins: Okay, so the questions aren't in any special order and it's off-the-cuff because I want it to be natural.

Hero #4: Okay.

Mullins: How long have you been an intake specialist?

Hero #4: It will be nine months.

Mullins: What did you do before that?

Hero #4: Before that, I was in intake, so we're talking 13 years. Not for a law firm though. I basically did the same thing, I qualified people for disability. But I've been here nine months.

Mullins: So you weren't doing this particular career at the moment?

Hero #4: Correct.

Mullins: Can you remember — you might need to take a moment — one of the most difficult calls you can remember taking? One that was so hard, so heart-wrenching, that you had to keep your cool and stay focused?

Hero #4: Yes, I've had several like that. One was a wounded soldier. If I remember correctly, he was 28 years old. He had disability through the VA, but because they had messed up his records, a lot of what he should have been getting, he was not getting. They were basically saying that he hadn't been in the service for four years. As we started talking and I started gathering information — he had PTSD, he had depression, anxiety — he shared with me that he needed to be able to get this help and that he has been having… hold on, I'm going to cry. He's been having terrible thoughts about suicide.

He shared with me that he had four kids, they were living with his wife's parents because they couldn't afford a home. The little one, I could hear him talking. He was sharing with me how he wasn't getting the right help from the VA. He could not support his family, he's 28 years old and he had been thinking about suicide. He wouldn't tell his wife because she was in the military also and he knew that would scare her.

Mullins: He wouldn't tell his wife?

Hero #4: He wouldn't tell his wife he was having those thoughts because he knew it would scare her.

Mullins: Why wasn't he getting help?

Hero #4: The military had messed up his service stay and were basically only showing that he had been in the service for five months instead of four years. He was not getting the medication or the help he needed.

Mullins: So what did he say to you?

Hero #4: We have a question that asks if you are having suicidal thoughts. When we were talking, he shared that the PTSD and the anxiety was so bad that he wouldn't admit it to his wife, but he was having awful thoughts. Because of my background, I said what do you mean by awful thoughts? I said, "You're not talking about hurting yourself, are you?" And he said, "Well, I have those thoughts." I asked if he meant having suicidal thoughts and he said yes and he said he wouldn't dare tell his wife because she would really worry. So I said, "Do not do that, you just cannot do that! We're going to get you help." I assured him that I would be praying for him and he was not to do that. I don't know how much you want me to say…

Mullins: Just share what happened.

Hero #4: I told him I was going to share something with him. We really connected because he was so young. I really had to get into depth of what was causing him problems because he's still young. You really have to do a very complete interview to show that he really does qualify. He didn't have any backup from the military because his records were so messed up. It really took a long time to make sure I had the documentation, the drugs and everything. But I said to him, "Suicide is a terrible thing to do to the family. Don't do that to your wife and kids, like, I can hear your kids. You just need to hang in there till we get help." And he said what would make you say that? I said that I don't share this with people, but someone in my family committed suicide six years ago. It happened, and I'm still working at getting over it. Don't do that to your family.

Mullins: But it's possible it helped him.

Hero #4: Well, I believe at times these phone calls come in divinely appointed and there is just something in his voice which tells me he needs to know that it would tear his family apart. I told him I'm still trying to move forward and you just don't do that to your family. You have two little kids, they need you, don't do that. It's those calls that make it very hard and you want to really help.

Mullins: But how do you get through the call and then adjust for the next call?

Hero #4: Sometimes I get up and take a walk. That one happened to be the last call of the day. Sometimes you just have to take a walk. Because of what we do, the disability, all day long you're hearing about people who are homeless, you're hearing about people who have mental health issues. I'm hearing about people who don't have family supporting them. I'm hearing about people who are down and out. The world gets very gray during my job.

Mullins: I know.

Hero #4: There are times when you have to literally shake off the… negative's not the right word. I literally have to shake off their energy and take a deep breath. Sometimes I get up and take a walk. I go upstairs, walk around the corner, come back down and then back to the phone. Sometimes you have to focus on something other than the negative because that's all I hear all day long.

I didn't do that very well in the beginning. Even though in my previous job I heard about people's illnesses, problems, can't-walk-to-the-bathroom type of stuff, but this is more. You hear about people who are homeless and the government's not helping them. You just have to be empathetic. I've always had an ability to talk to someone over the phone and be able to build a rapport with them. You just have to be empathetic, be able to build the relationship for the moment and since I've been at this job, you really are helping them. I mean, we're giving them a way that they can get an income, that maybe they can get out of the shelter. I just hang on to that and I go on to the next one.

Mullins: What about when you wake up in the morning, when you're getting ready to get out of bed. When does it start in your mind about the type of calls you might have? Does it start when you get in the office or when your feet touch the floor?

Hero #4: For me, more so when I'm in the car. But I like the fact that I'm helping somebody. My family wonders why I'm doing this, but every day I get to help somebody. And people are really appreciative that you've taken the time. I mean, you're asking them for their most intimate details about what kind of medication, how sick are they, you're asking them do you have money in a checking account? Are you on food stamps? All those important details. And they're basically telling you their life story. You're making them feel bad because you're talking about all the bad things, otherwise, they wouldn't qualify.

But in the end, you're helping them. You're moving them on to the next step so they can file for disability. You've qualified them, you're giving them help. And that's what keeps me going. I know that's kind of funky and crazy, but that's what I like about this job.

Mullins: So you've told me why you do this, I mean, I'm sure you must have meltdown days when you're like I don't know if I can keep going or do you not?

Hero #4: Well, I do. Most of it is because I'm not making the kind of income like I used to, to be honest with you. The other part is although I'm kind of an introvert, I'm very competitive, so when I wasn't hitting my numbers, that was very depressing to me. There are some days that are hard, but I like the people I work with. I like the support we give each other and I pray a lot. That's what really gets me in here in the morning. I pray to God to give me the right phone calls, to help me make my appointments. Dear angels, bring the right calls to my phone and help me stay focused and do the right things today.

Mullins: That makes a big difference though — praying.

Hero #4: People can call it whatever they want. It's just part of who I am. It really is a gift to be able to sit and do this all day long.

Mullins: Oh, I know, it is a huge gift and my hope with the book is that more people who do this will realize even more what a gift they really are because I don't really think a lot of folks who do this kind of job really give themselves enough credit for what they do. Hopefully this will shine a bright light on them.

Let me ask you a question. If you had the power to do anything that you wanted to do, to create any kind of system or support campaign to all the people who are intake specialist with you, some way to help them get through… Everybody has different ways of dealing with phone calls and unfortunately some individuals are having a tougher time. They need more support and more help. So if you were in charge of your firm and you could put together any kind of program that you wanted to help your team member deal with these phone calls a little bit easier, what would you do?

Hero #4: This is the first law firm that I've worked in and it's very conservative. To a certain degree, you have to be. I mean, you're making 80 to 100 phone calls a day and you're only taking four cases, five cases on a good day. So in a way you have to be focused, but the companionship amongst each other is a big stress-breaker. We're not really encouraged to communicate. Just little things, like if somebody accepted a tough case, we'd throw him chocolate. I don't know if there really has to be big dollars, just little ways to pump people up and let them know that you appreciate how hard they work. In the previous company I worked in, they did really good job at it, they don't do it so good here. Just ways to allow people to go de-stress. It's hard because you're on the phone, so you wait until the last minute to go to the bathroom.

Making those kind of everyday things easier — way to go, pat on the back, go to their desk and say good morning, shake their hand. Even if there was a corner for when you have a really bad call, you can just go stand in a room, sit on a couch for a minute. We have a really nice break room but I have to go to the car and turn on my Christian station, read my Bible. I guess that's the answer for the previous question you have. I take my lunch hour and I have to unwind and de-stress and do something totally different. I go where I'm facing the main street so I can see the sun and see the grass because I don't have a window by my side of the desk. Then I can come back and be ready to go for the afternoon. That's what I do.

Mullins: That's what we hope for. For example, I don't know if you have ever heard me talk about this or not, but one of things that I talk a lot about to law firms is our Intake Academy venting lounges.

One of the things that I've been trying to talk to the firms about is creating venting lounges throughout the firm so that if somebody needs to walk away, they can go to the special room. It's pretty, it has the sound of water, maybe some healthy beverages, some lounge chairs and couches, a nice window. And people can go in there and be alone. If somebody else is in there, they can ask that person, do you mind if I vent? And that person might say okay and the person gets to talk, then that's just it, and they walk away.

Hero #4: Right, and until you said it I hadn't really pinpointed why I have to go and get into the car every afternoon. But that's it, that's how I get through it. I started doing that from the very beginning and I really hadn't thought about it. In fact, at one point one of the girls said you never sit and have lunch with us. I said I have to go listen to my music. But you're right, that's how I get through the hard stuff. Once I get in my car in the evening, I'm done.

Mullins: That's good!

Hero #4: Other than this one guy that I've prayed for now, he's on my mirror. That's it. I go home. I'm done. I don't think about my cases. I just turn it off and I prepare myself in the morning to get here, do whatever I have to do, think about where I may need to be, numbers, how many calls, do I need to call anybody from yesterday. The final list that you advised me, Chris, to keep every night, I do that. I stay probably about 10 to 15 minutes longer at night and I make my list and get ready for the day. Then I'm done until I'm ready to come to work in the morning.

Mullins: Well, that's awesome. I think that you're amazing. I feel grateful that I've met you and became your teacher. You're going to get a copy of this book. Everybody we interview that we publish, when the book comes out, we're going to put their name in a raffle and then we'll pull out a name. Whoever we pick out, we're going to donate five hundred dollars to their favorite charity, in their name.

Hero #4: Oh, my goodness. Chris, how fabulous!

Mullins: You get to be a part of that.

Hero #4: Well, I'm the blessed one, honey. You didn't know it, but God put us together at the right time of my life when I was ready to drop my past. Can't drop it totally, but drop to the degree where I can move forward and you helped me do that. I'm very grateful for that.

Mullins: I appreciate that.

Hero #4: Remember, I've been dealing with this for years. Prior to doing phone work for the last 15 years. I was a manager. I worked in a hotel, I did a multiunit supervision. Then 15 years ago, because the pay was good, I went to a call center. I went from walking and talking and motivating people to just sitting there on the computer. It really wasn't me. I stayed with it because it was good money. I had my months where I was on top, you know, I wouldn't have stayed there that long if I hadn't. But I wasn't a continuous top performer. I never was on the bottom, I was always in the middle or slightly above the middle. When my family member committed suicide, there were years that I barely hung on because of the big question that I asked you in our last little private one-on-one training session. Help me get to 66, I don't know what made me ask you that.

Mullins: I know.

Hero #4: That was a miracle. And I can't thank you enough for that. And then I did it twice!

Mullins: I know and we're talking again.

Hero #4: And I'm going to do it. I need a vacation soon. But you can't hit 66 and take a vacation. So I think I'm going to have to work all the way through to make sure I can do it three times.

Mullins: You can do it and I hope that you keep me updated.
Hero #4: Oh, absolutely. You are my first email.
Mullins: That was awesome when I got your email.
Hero #4: Thank you, Chris, I really appreciate it.
Mullins: You keep doing it and we'll give you the book as soon as it comes out.
Hero #4: Okay, great.
Mullins: Just continue to be a bright light.
Hero #4: Thank you, dear. We're studying that at the Bible study I'm doing and I will do my best. I can't believe you came out with that word. That was a divine statement you just made. God bless you, sweetie. You take care.
Mullins: Alright, we'll see you soon. Bye now.

Chris Mullins Interviews Hero #5

Mullins: My first question for you is how long have you been an intake specialist where you are?
Hero #5: I've been here about a year and a half.
Mullins: That's it? What did you do prior to this?
Hero #5: I was a store manager at Victoria's Secret. I was in customer service. I majored in political science, but this is my first real job at a law firm.
Mullins: Prior to this, you were at Victoria's Secret and prior to that, you were in school?
Hero #5: Right. I was working at Victoria's Secret while I was in school. I finished school about a year ago.
Mullins: Wow, okay. Can you remember when you took this job why you took it? I hear all kinds of different answers when I ask that question so it doesn't really matter to me, but do you remember why you took it?

Hero #5: I don't remember exactly why. I remember they were telling me about the position and I initially came in for an interview for a paralegal. I'd like to be a case worker and management had said something about my personality, they felt like it would be beneficial to place me in…

Mullins: You'll have to speak up just a little bit, okay?

Hero #5: Okay. I initially interviewed to be a case worker, and management had suggested that I'd be in this position, I guess because of my personality. I was nervous at first when they said that I was going to be talking to people who were recently involved in accidents, or the type of social security clients that I was going to be speaking to. It was really nerve-wracking thinking I wasn't going to be having that much interaction. It was a big difference coming from a customer service position where I was dealing with people face-to-face. So that was a challenge.

Mullins: Tell me about one of those that you can remember, one of the most difficult phone calls that you had to take of where you really had to hold it together. The stories that they were telling were just unheard of and you had to keep it together.

Hero #5: I remember this one client in particular. She was a social security disability client. She had called our law firm because they had stopped her benefits. What happened was she was living in an illegal residence, so they weren't delivering her mail and they stopped her benefits. She wasn't aware of the situation that she was up for requalification or whatever. She's legally blind. Because of her circumstances, even though she is on medical treatment and everything, there was an issue with an overpayment with social security and when these types of cases come up, unfortunately, we can't represent them.

I felt so bad for this lady. She actually went down to the local social security office to request documents from them just stating the amount she owed. Her ex-husband took her, but when she was there at the office, she fainted. Her ex-husband went to go help her and security wasn't aware, I guess, that they were together. So security actually attacked her ex-husband when he went to help her.

Mullins: They attacked him?

Hero #5: Yes. Even after that visit to the social security office, even with the documents she had sent me, we were still unable to help her. She's legally blind, she fainted at the local office. I guess she said that the office was really hot and she was having some trouble. She doesn't really go out much and after all of that happened, we are still unable to help her. That case really stuck with me and that was when I was initially hired, so it was like one of my first cases.

It's just one of those things where you… You hear different cases all the time where people yes, they're technically eligible, but at the same time, they aren't as medically severe as others. When you hear a case like that and since she had other issues on top of that, you just feel so terrible that you can't do anything.

Mullins: I've talked to a lot of folks like you and, as you know, I listen to thousands of recorded real prospect phone calls every month with the permission of the law firms.

Hero #5: Right.

Mullins: Have you ever had any calls where people have said, "Look, I'm going to kill myself ?"

Hero #5: Of course, especially with my worker's compensation clients. These are people who have worked their whole lives. They're injured on the job and you hear these stories about clients being terminated. It's overwhelming. The bills keep coming and for whatever reason their spouses a lot of times don't work. It's really hard to hear these people. They're having trouble with their medical treatments, they're terminated from the job, they're not receiving payments. The majority of our cases are anxiety and depression and things like that. They do develop throughout the case, even from the beginning stages. It's so hard to hear these people who have been working and doing everything according to what they think should be done and according to their work conditions — they're injured. You hear about the doctor telling them they're never going to be able to do this type of work again, ever. And they're never going to be able to return. A lot of these people are middle-aged guys with families. Just having to hear their struggles with worrying about feeding their families and trying to provide and worrying about their health at the same time. Unfortunately, it does get to that point sometimes where they'll call you and say they're having those thoughts or they don't really know what else to do. They try to say that they're going to resort to that.

You can hear the things they're saying, their worries and thoughts. You can definitely tell there's something deeper. That's hard as well because you don't really have any place to recommend treatment or anything like that. It's difficult.

Mullins: So when someone says, "Look, I'm thinking about killing myself. I can't take it anymore." I don't know if that's how they say it, but how do you handle that?

Hero #5: I thankfully I haven't had anyone that has said those exact words but you definitely hear about people all the time that want to just give up. With my social security clients, a lot of their ailments are severe anxiety, severe depression and suicidal thoughts. When they tell you that they're in medical facilities for months and months at a time, because they feel like they can't function on their own or they can't be in an environment where they're at risk of harming themselves, you don't really know what to say. Sometimes you don't really know how to comfort them or provide them with hope or faith that things are going to be better. It is hard to try and keep their faith up.

You want them to have confidence in your firm, knowing that you're going to be able to help them or you're going to be able to make things better. It's hard when they're at those low points in their life where they feel like no matter what anyone says or is offering to do, it doesn't feel like it's going to get any better. It's hard trying to establish faith in them or it's hard to get them to try to have faith in you. And that's basically what you have to try to do in every single conversation. You have to try to win their trust and win their faith in the course of a 30-minute phone call.

When they're calling and they're at that stage when they're feeling they would rather die, you have to deal with all of this. It's tough and there are a lot of cases like that.

Mullins: But how do you…

Hero #5: How do I try to re-motivate them?

Mullins: I'm worried about you. I'm wanting to know about how do you take care of YOU, one call after the next? How do you regroup?

Hero #5: It's tough sometimes. After you get off a heavy phone call, the last thing you want to do is start over with someone else that has a similar or even worse of a situation. It's tough trying to re-motivate yourself, but you try to remember to be thankful. You have a balance between being emotionally involved with the cases but still being professional and making sure that you complete your job up to your environment's standards and everything. I try to constantly remind myself that these are human beings that I'm speaking to. They have real-life situations so I just try to relate to the client as much as possible when we're actually speaking. After that, I sort of use it as a motivator for me to try to help the people who are calling in.

Mullins: Let me ask you this question. Let's pretend, for a second, you have the power at your firm. You have the authority and the power to put together a support program for all the intake specialists at your firm. Everybody who talks to clients and prospective clients, who are over and over again trying to re-motivate people, reengage people, help them to feel better, solve their problems, hear the terrible stories.

So here you are, you have full authority to put together a support campaign for all of your team members to help them deal with this stress that's not going to go away. Have you ever had ideas or thought about that? You know how it is when you're in the middle of doing your job and every once in a while, you get this thought and say, if I could do this, this is what I would do, but then you forget it, you lose it, it goes away. What about you?

Hero #5: There are two of us in my department and we try to motivate each other throughout the day and we vent to each other. After we have a rough phone call with a client, we'll just sort of say, "Oh, my God, I feel so bad." We try to vent when we can during the day and tell each other. But at the end of the day, you have to try to put it behind you and recognize that there are other people who need help as well. I use it as a motivator to try and help as many people as I can while I'm here during the day. It is rough, though. There's definitely not a particular way that you handle each call. Each one is so different. There are definitely times where I don't want to continue with the call.

Mullins: Like you want to put out a Do Not Disturb sign.

Hero #5: Exactly. It's definitely hard not to be emotionally involved. I do try to be sympathetic. They are human beings, but when you hear these terrible stories… You feel for them, you understand what they are going through. Unfortunately, with every type of case, everything is very time-consuming, so it's hard to try to keep yourself with it. It's hard to stay present sometimes because you're thinking about everything.

Mullins: Maybe you'll have to think about this and email me later on if you want, it's up to you.

Hero #5: Okay.

Mullins: Here's another thing. What I mean is, for example, I don't know if you've ever heard me talk about this, or if you've read my book in the past or our newsletters. I know when we did your Intake Academy phone sales coaching at your office, one of the things we talked about is I believe strongly that folks who do what you do need to have venting lounges.

Hero #5: Right.

Mullins: Lounges set up throughout different areas of your building that are specifically designed for you to go into to be quiet, to be calm. Maybe there's something like some water running or meditation tapes, positive things on the wall. But no phones, no technology, just a quiet comfortable lounge. A little room that people can go to be quiet with themselves or if somebody else is in there also being quiet, they can ask permission from each other and, with no strings attached, they can vent with no repercussion. Then they walk out and go back to work.

Hero #5: No judgment. Sometimes even when you leave, even outside of work, it affects you. Sometimes when you have a heavy day, you leave, you don't even want to turn on the radio. You don't want to speak to anyone or do anything. You don't want to be social. You just want to go the gym and run for a while or kind of hang out on your own.

Mullins: Or scream, or cry…

Hero #5: Exactly. You have to go home knowing that you have to do it again tomorrow. You really have to be a self-motivator. I feel like you have to have the personality to be able to do it. You have to be able to be connected to someone, even though you're not physically with them. You have to search, within a matter of that phone call, and you have to build that connection. A lot of times it's easy, but sometimes it's tough. When you have an angry client, or someone that is in this situation where they haven't really been helped. They're frustrated, they're angry. There's a lot of different emotions that come with the position that you can't really prepare yourself sometimes.

Mullins: It's absolutely true. And I felt something about you through the various conservations we've had. I think it was in November. I actually told the attorneys at your office. I don't know if they said anything to you or not.
I was on a training class with your team and you got on. There was no internal communication about the class. You somehow found out at the last minute about the class so you jumped through hoops, got your team on the conference call, you were making it happen.
Hero #5: Got everybody.
Mullins: What I learned about you is that you fought to make something happen. Since then I've felt a different kind of connection with you, which is why I chose you.
Hero #5: Oh, thank you. I appreciate that, Chris, I really do.
Mullins: I just want to tell you that I'm proud of you. You make a big difference in everybody's life.
Hero #5: Oh, thank you.
Mullins: I know that things aren't easy. I know that when you work in business, it's like spinning plates. Life happens and you have to kind of just roll with the punches and it's not that easy. I know our Intake Academy phone sales coaching program is not easy. But you got this.
Hero #5: Thank you. We forget sometimes it's a service, it's not even really a business. It's a service that we're providing for these people. It's a lot more personal than a normal job, I guess, would typically be. You develop a relationship with them. Even when they do move on, you still want to help them, even if you can't.
Mullins: Well, my hope and my wish for you is that you continue to be authentic. To do the best that you can, and to

always find a way to do better. To not just take care of the call that you're on, but to take better care of yourself. And also see what you can do to help those on your team. You have a gift and I think that you need to step up a little bit more and show your gift.

Hero #5: Okay, I'll try.

Mullins: Share your gift — unconditionally, without being probed — with your team mates, something positive that they did. Work more at being the light with everybody that you approach. Okay?

Hero #5: Okay. Alright. I like that.

Mullins: You can do it.

Hero #5: Thank you.

Mullins: You stand taller and you keep in touch with me and I'll talk to you soon, okay?

Hero #5: Thank you. Have a great day. I'll talk to you soon.

Mullins: Okay, bye now.

About the Author

IntakeAcademy.com was founded by sales and marketing expert, Chris Mullins. For more than 25 years, through her proprietary and guided training and programs, Chris and her team have helped hundreds of law firms around the country convert more prospects into profitable clients.

IntakeAcademy.com was created because, as the headline points out, "Great Marketing is Not Enough When Your Prospects Don't Convert."

Whether your firm invests $50,000 or $250,000 on marketing, if your frontline team is not trained properly how to handle each and every inquiry, those marketing dollars are completely and utterly wasted.

IntakeAcademy.com is a total business solution that transforms how law firms and call centers train, coach, hire, and retain intake specialists, and how frontline staff handles legal intakes. Using Chris's proprietary training, clients are able to achieve significant financial breakthroughs in record time with less struggle and less cost, yet more effective intake conversion strategies.

Now, instead of your law firm spending ***more*** money on marketing and advertising to generate inquiries, IntakeAcademy.com helps you make the most of what you're already getting. Imagine investing the same marketing dollars you are now but converting more prospects into profitable clients – that's what is possible with IntakeAcademy.com.

Using online and offline products, services, training, and coaching programs, IntakeAcademy.com shows attorneys and their teams how to handle intake calls, how to be ***more*** effective on the phone, in person, or online with prospective clients.

IntakeAcademy.com brings together exclusive groups of like-minded attorneys, partners, intake specialists, receptionists, and managers who want to increase their case load with ideal clients, maximize their marketing dollars, and create a better client experience and more rewarding law practice.

IntakeAcademy.com teaches better intake and conversion by concentrating on a proven IN.T.A.K.E.™ system, which focuses on four core areas:

1. Relationships first, business second
2. Consistent, integrity-based sales process
3. Empowering and enabling staff with the right skills
4. Ongoing coaching and reinforcement to ensure intake quality

Unfortunately, far too many law firms ignore this straightforward and proven approach. Instead, they rely on a marketing strategy that can best described as “Spend and Hope”– whereby they ***spend*** more on marketing each year and ***hope*** that a prospective client will choose their firm to represent them.

www.IntakeAcademy.com helps clients understand how and where their law firm is “leaving money on the table” and provides a proven system and strategy to convert more prospects into profitable clients.

If you’re tired of the “Spend and Hope” approach to growing your law firm, then contact us today (***https://www.intakeacademy.com/contact-us/***) and schedule your free 15 minute consult with Chris Mullins personally, and let Chris and her team of professionals show you how to convert more prospects into profitable clients.