



INTAKETM
ACADEMY^{LLC}



Chris Mullins

January 2018 • Volume 6 No. 1

ISSUE HIGHLIGHTS:

- **Shaking Up the Social Norms of Marketing in 2018** Page 4
- **Resilient Employees Start With Right Recruiting** Page 6

"Today I learned to focus on the depth of the call. My tone, listening and empathy are what make the caller feel like they are in good hands and that is our goal! I also learned that if I know that there is a chance the caller will be on hold for longer than a moment, to be sure to let them know before putting them on hold. Always be sure to check in while they are on hold. Reacting to what the caller says is very important... compassion is key!"

— Summer Bailey, Bart Durham Law

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

Chasm of Change — Restructuring — The Goliath of Change

by Dr. Eric "Rick" Johnson

Is it time for your firm to examine its vision for 2018 and beyond? There are many points in this article that you've read or heard Chris speak about. Now is a good time to take a look and evaluate your business — law firm or otherwise.

RICHARD L. Daft, one of the country's recognized academic leadership experts, raises the question, "What kind of people can lead an organization through major change?" A turn-around restructuring qualifies as major change and requires transformational leadership. Daft points out that this type of leadership is characterized by the ability to bring about change through innovation and creativity.

"This type of leader motivates people to not only follow their lead but to believe in the vision of corporate transformation, the need for revitalization, to sign on for the new vision and to help institutionalize a new organizational process." Daft points to four principles in

discussions about leading an organization through a major change. These four principles are the foundation of the restructuring turn-around process.

- 1) Create a compelling vision
- 2) Create a new organization
- 3) Mobilize commitment, empowerment
- 4) Institutionalize a culture change

Caution — Beware of the Dip

A "transitional performance dip" is common when introducing major change accompanied by a culture shift. Performance most commonly gets worse before it gets better. There are four phases of the transitional dip with associated cause. They include:

Denial – Confusion exists, feelings of being overwhelmed, acting like nothing is different and checking out are common employee reactions in this phase. Communication and sharing of information is

critical to overcoming this type of employee reaction.

Resistance – Complaining, blaming others, spreading rumors, frustration, anger and erratic performance are common employee reactions. Again, communication, understanding and listening skills are critical during this phase of the transition.

Acceptance – Renewed energy starts to become evident, optimism appears and doubt begins to dissipate. Excitement and risk taking become evident. This is when the vision must be restated and shared with every employee taking the time for full explanation and answering all questions.

Commitment – Discretionary energy is released. Employees become action oriented toward new goals. Ownership of the vision is now firm wide. Rewards and reinforcement are essential during this stage.

The length of time or "depth and width of the dip" depicting this phenomenon cannot be accurately predicted due to the com-

cont. on page 2

Corporate Office

Intake Academy LLC

507 Greenfield Rd.

Peterborough, NH 03458

Corporate Office: (877) 455-7650

New Hampshire Office: (603) 924-1640

CEO

Chris Mullins

chris@intakeacademy.com

Deanna Mullins, *Rock Star Executive Assistant*

deanna@intakeacademy.com

Business & Accounting Office

Beth Wolfson, *Business Manager*

beth@intakeacademy.com

Business Office: (603) 924-1640

Newsletter and Book Editor

Deb Morrison

dnd2222@earthlink.net

Change, cont. from page 1

plexities that determine it. Factors contributing to the length of time before the change efforts begin to show improvement can be impacted by the following factors:

- ◆ Magnitude of the structural changes
- ◆ Success of the communication to all employees
- ◆ External environment factors
- ◆ Critical mass of the firm itself
- ◆ Competency of the middle management group and their experience with structural and cultural change
- ◆ Competency of the executive staff and their people skills
- ◆ Effectiveness of leadership at all levels
- ◆ Severity of the financial crisis or level of financial success
- ◆ Timing

Change Process

The restructuring change process begins with the strategic restructuring of the organization, which is required to “stop the bleeding.” This process starts with the immobilization of the old culture. This is mandatory, as introduction of change into any existing culture is difficult at best. Introducing change into a losing or stagnant culture is almost impossible. This change must deal with organization theory, social psychology and business history. It must be dynamic and include the introduction of fresh new leadership.

This is a behavioral process. People can create change but people also resist change. The change process introduced must answer the

To get **One FREE Mystery Call and Consultation** with Chris Mullins — (managing partners, COOs, marketing directors and intake directors) — go to <http://mysterycall.pages.ontraport.net> to get one FREE mystery call and consultation with the Intake Academy. During this free consultation you will learn what your intake team is doing well and specifically what to do to fix any intake sales opportunities that is identified during the consult.

Intake Academy LLC

Private Members and Clients Will Receive Customized Sales Coaching, Consulting and Training for...

- Inbound and Outbound Phone Sales
- Case Managers – *customer service, relationship, communication & sales*
- Attorney – *script, sales, relationship, communication*
- Intake Specialists
- First Impressions Director, Receptionist
- Call Center
- Legal Assistants

They'll Also Receive...

- Monthly Intake Coaching and Call Reviews
- Monthly Q&A Attorney-Only Mini-Mastermind Conference Call hosted by Chris Mullins
- Monthly Q&A Staff-Only Mini-Mastermind Conference Call hosted by Chris Mullins
- Intake Academy Gold Standard Conversion Script
- Gold Standard Certification
- Ongoing support to change habits and behaviors

Legal Intake Specialists Association™
(LISA) – *FREE membership for clients*



question, “How do we get from here to there?” The answer to that question is your new vehicle for success.

This vehicle includes the restructuring plan, individual one-year departmental plans and every strategic initiative developed by the management team. Most importantly, this new vehicle is submerged in the empowerment theory releasing individual employee initiative. The plans must be unified, simple, consistent and universally understood by everyone.

Most of the change that has been introduced must be induced change versus autonomous change. Autonomous change has a life of its own. It proceeds due to internal dynamics and follows its own course. It is not easily controlled as it forms its own dynamics.

Induced change is calculated and planned. It can be controlled if buy-in is generated through sincere communication and employee involvement.

Each step along this path will be accompanied by distinct challenges. As questions arise, management must be prepared to answer openly and honestly. While the old culture is suspended, change can thrive under the right circumstances. It is the responsibility of the executive team to insure that these circumstances exist. The primary ingredients that create the right circumstances include open honest communication, empowerment, risk taking, acknowledgment and reward.

Organizational Behavioral Process (OBP)

This is basic to creating change, and it becomes an important part of the new vehicle for success. OBP may be described as the wheels of

the new vehicle. This process will carry the organization on to new heights, new accomplishments. Organizational behavior has its roots in organizational theory and group dynamics. People are the most important ingredient to every organization and the organization's behavior. People and how they are treated will reflect the organizational characteristics, the way it acts and interacts with its own people.

Empowerment, the decision-making process and the communication channels are examples of how the organization interacts with its people. Organizational behavior is not easy to change. That is why it is so important as mentioned earlier to immobilize the old culture to introduce change. The behavioral process of the organization can withstand personnel changes.

In other words, changing out management does not guarantee change in organizational behavior. You must take proactive steps designed to create new organizational behavior. The new vehicle is part of that. It includes focused specific objectives, open channels of communication, empowerment and a sincere respect for the individual employee and his contribution to the organization.

Organizational behaviors become generalizations. They are discovered from observations of everyday work habits and they have no independent existence apart from the work processes in which they appear. They are difficult to identify but they are extremely important. They affect the form, the substance and the character of the work processes themselves.

They actually affect the way the work process is carried out. They

are different from culture because they represent more than just values and beliefs. They actually are involved in the sequences producing work. The decision-making process is a major characteristic of the behavioral process. In other words, decision making is not the personal responsibility of a single manager, but a shared, dispersed activity that they only need to orchestrate and lead. This is still a surprising and often unaccepted theory of managers today.

The Eight Road Blocks to the Change Process

- 1) The lack of a sense of urgency
- 2) The lack of buy-in, a coalition of support
- 3) An unclear vision
- 4) Failure to communicate the vision
- 5) Failure to provide resources and remove obstacles
- 6) Not systematically planning and creating short-term wins
- 7) Declaring victory too soon
- 8) Failure to anchor change in the culture as it is occurring

Sense of Urgency: Success at anything requires a sense of urgency, a commitment to accomplishing something. If employees don't have this sense of urgency, complacency can become an issue. To meet difficult challenges, to excel at anything, to create competitive advantage it is absolutely essential that employees release their discretionary energy toward achieving company objectives. Discretionary energy is that extra that you can't ask an employee to give but is automatically given by those employees that have a sense of

cont. on page 5

Shaking Up the Social Norms of Marketing in 2018

by Landon Biehl, Consultwebs

THE implementation of marketing practices in recent years has proven to be much more competitive, and can sometimes seem like a challenge for many industries. Diversifying your marketing strategies, and developing new methods for successfully targeting specific audiences requires constant research, and the ability to adapt new methods to meet the changing climate of a company's customer base.

The constant stream of new social platform developments, and which segment of the businesses target market identifies with them, is now more important than ever. It is important to have a team that is able to identify these shifts as they take place, and adapt them into their growth plans for their clients on a daily basis. Taking steps to diversify your company and move outside of your comfort zone may be challenging, but it may provide some great opportunities for growth in 2018.

Below are some ideas that might help you to restrategize your current marketing practices in the upcoming year.

Utilize the Time of the Year

Regardless if you are an attorney, marketing professional or a small business owner, it's important to carefully consider the time of year in which new campaigns are developed. Identify with your customers and determine if any particular seasons or holidays are particularly important to them.

Digging deeper into your clients' passions and interests can help develop deeper relationships with

them, and develop a higher level of respect for your organization. As an example, attorneys could consider evaluating a new client's interests during their initial intake process. This information can then be used by the marketing agency to provide cards during a special moment, surprise tickets to significant sporting events or even thoughtful emails during hard times.

Companies can also develop strategies for campaigns centered around a holiday or season. As an example, Gruber Law has a creative asset that helps to outline seasonal driving conditions in the state of Wisconsin. This resource helps to identify seasons which pose a higher risk of accidents, the reasons behind them and locations of specific seasonal crashes. This campaign found success because it helped to illustrate important information such as 1) contrary to what

tiative specific to the time period is a great way to increase engagement, present information to current clients and potentially reach new audiences along the way.

Partner Up for Bigger Impacts

When we think of our competitors, they are often perceived as our biggest enemies. Businesses constantly compete against each other for the largest sector of the customer base. When evaluating your strategies in 2018, it would be great to consider going against this norm.

Consider partnering with competing companies to promote a bigger initiative in your community. Work to increase engagement within your community and allow members to come together for a larger cause. Consider sponsoring a donation event or volunteering session to assist less fortunate residents of your community. As the leader of the event, community members will develop a deeper appreciation for

Consider sponsoring a donation event or volunteering session to assist less fortunate residents of your community.

you would expect, winter did not contain the highest number of accidents, and 2) daylight saving time has an effect on accident rates throughout the state.

This was an excellent way to determine a need based upon the season and illustrate useful information for the firm's potential target audience. With the number of holidays we celebrate throughout the year, developing an asset or ini-

your firm and the message you are portraying to your community.

As the community becomes more engaged, clients whom you may have never had previous interaction with will begin to recognize your brand. As these individuals require a need for your legal services, they may reach out and become a potential client in the coming years as they reminisce on the service you provided to the community.

urgency. Of course, no employee will release that discretionary energy for a leader that has not earned their trust and their respect. A leader will not be respected by the employee until he shows respect for the employee. A leader will not be trusted by the employee until he shows trust in the employee.

Forming a Powerful Guiding Coalition: Success is not an individual accomplishment. Initiating change requires buy-in and agreement. A group of believers, achievers and

team players must be assembled to not only support the change process but to drive the process. The group must function as a unit showing unilateral support of the change process. Examination of market and competitive reality is part of the challenge as well as identifying and discussing potential crisis, critical constraints and major opportunities.

Creating a Vision: Success at initiating change starts with the creation of a compelling vision that provides a roadmap for the change. This roadmap clearly answers the ques-

tion, "What's in it for me." The vision is supported by the development of strategy and action planning to achieve the vision.

Communicating the Vision: Success requires leadership, and leadership without communication is like a gun without a bullet. It looks impressive but it can't do anything. A specific communication strategy must be outlined and acted upon to insure that all employees are aware of what the vision is and how it is expected to be accomplished in-

cont. on page 8

Stay on Top of Social Changes

It's vital for all marketing strategies to encompass and constantly evaluate which social platforms their target audience is engaging with. With the introduction of newer apps to communicate with friends and family, changes must be made to effectively market to individuals engaging within these ever-changing channels.

Most recently, many companies have shifted more of their focus to appeal to audiences using multiple channels outside of just Facebook and Twitter. It's a good idea to appeal to your audiences by targeting ads where you will find them most. As an example, many companies have begun to develop Snapchat profiles where they can engage one-on-one with customers. It's a personal way that customers can receive information at little to no cost to the business.

For the legal industry, it's important to work with a team that is constantly staying abreast of the latest social network changes and adaptations. Multiple platforms, such as

Facebook and Twitter, continue to change their methods for targeting specific audiences and demographics. Fine-tooth combing through different behavioral traits of your target audience base can help you to get the most value for your investment in social media targeting.

Evaluate Your Brand's Effectiveness

Your online presence, as you know, is at the forefront of the potential client's journey. Visiting a law firm's website is generally the very first interaction they will have with your brand. With this in mind, developing a website that is professional, yet visually appealing, easy to navigate and, most importantly, up-to-date, includes the core elements of a powerful first impression. Just as trends change, the ability to develop a more comprehensive, stylish website can change from month to month. In 2018, consider implementing newer options that make your presence online more powerful and meaningful for your audience.

With this being said, it might be

time to consider rebranding your law firm. Even after a few years, the look and feel of an entire organization can change. Newer ideas come into play as competitors are taking advantage of newer tools and ways to impress their audience.

Potential clients may begin to recognize this and shift their focus to organizations that can offer them a better experience. If this is the case, it might be time to consider revamping your brand. Develop a new image for your firm and the values it stands for. Change your methods of online presence and continue to make changes to how you target your users online.

As with every year, 2018 will be filled with a range of updates and newer SEO practices that may require updates to your current marketing strategies. It's important to leave this work to digital marketing professionals who can best evaluate your strategies and suggest changes. Stay tuned for an upcoming year full of changes!

Resilient Employees Start With Right Recruiting

by Eileen Mcdargh

MY mother always said, “To end well, you must begin well.” Of course, she was talking about how you separated clothes for the washing machine or how you chose vegetables at the market. But it’s also true when it comes to creating a resilient, sustainable workforce. The questions you ask in the recruiting phase will help both you and a potential employee determine if you have the right fit for your organization.

Because today’s work environment is one of constant change as well as one with fluid teams, the ability to deal with different people as well as respond to unique situations is paramount. Likewise, there must also be a values fit — a real fit. Values are not something posted on the wall and forgotten. Rather, values are demonstrated in every day actions. Thus, your questions must also dig deeper into how this potential employee makes decisions.

Consider these top five questions as a way of determining if this is a match made in heaven or hell. By the way, I assume you’ve already looked at the required technical skill base. These questions are designed to evoke behavioral responses. You might also give these questions in advance to the interviewee. They are

not easy to think about on the spur of the moment. And if it is a young recruit, their life experiences might not have opened up to such encounters.

- 1) Describe a situation where you had to work with someone whom you didn’t like or respect. How did you handle that?
- 2) Think of a difficult decision you had to make regarding a work (or school) situation. What criteria did you use to decide on a course of action?
- 3) Think of a situation in which you were moving right along and then, suddenly, something happened to pull the rug from under your feet. What was that situation and what happened? What did you do?
- 4) Please think of the worst and the best customer/client experience you have ever had. What was it and how did you handle it?
- 5) Let’s pretend this is your last day on earth and you are listening to people talk about you. What do you want to hear?

Bonus Question: Would you be willing, after four months on the job, to come back and tell me what we can do to improve either your

...pretend this is your last day on earth and you are listening to people talk about you. What do you want to hear?

job, a process, a procedure or a policy? This last question is one that you dare NOT ask unless you are willing to actually call the employee, listen to her ideas seriously, and respond in a meaningful way. I firmly believe that “new eyes” in a setting can see things we might no longer see or hear.

Final point: A resilient employee is one who can grow through challenge as well as opportunity. The key word here is “grow.” There might very well come a time when growth opportunities with your business are no longer available. This is where you do what you can to help them find their next growth enterprise and wish them well.

Don’t get caught in the trap of “I spent all this money to train them and they’re gone!” If you begin well and end well, you will have a business champion for life. She can very well send you your next employee as well as bring more clients to your door. And that helps you grow and sustain a resilient organization.

A Powerful WIL

One client is really put to task and responds to our WIL request with some thoughtful insight from his perspective. Do you agree or disagree? What are some of your thoughts?

Following our lawyers-only (including student/apprentice lawyers)

Chris Mullins session, we were provided five things healthy (or successful?) lawyers do. Here is my WIL.

- 1) **Writing in a journal, every day — brain dumping.** This is a useful practice if one has the time. When writing something out, thoughts that would have otherwise remained uncoalesced are stamped

into permanence. By virtue of writing something down, it is reflected upon and saved into a different kind of memory to be later considered should one wish to do so. There are detriments, though, as well. Each time something is recalled, it is modified. Writing something down will attach the temporal biases to the thoughts at that time.

This is problematic, especially after a long day of vigorous argumentation within an adversarial system. Brain dumping is a great sort of venting, but until the subconscious has had an opportunity to resolve internal conflicts, the emotional colorization of the writing may skew the future value.

That is, if I were to write about my day at the end of every day, every day may seem like it was another battle. Notwithstanding, there would be no obligation to limit a journal to merely “what happened today”! However, this is what I would expect to occur should one actually be writing every day.

As with a relationship that has been developed over a decade between spouses, at some point the only thing left to talk about is what happened “today.” Longer spans between entries would certainly provide a useful cross-section. If one writes too infrequently, the sample size may be too small to make any extrapolations regarding a tendency for any particular colorization type.

If one really was to diarize every day, it would be a worthwhile exercise to try and categorize an intended audience, with hashtags of some kind. With 365 data points input per year, you could get some really interesting data. If it’s beneficial to do a daily diary, would it not be beneficial to know what you’re diarizing about? Having said that, if you’re spending all day, every day, at work and then taking the time to write about work, maybe it’s best to not write at all and put the sword down for a few hours per night instead.

2) **Notice nature.** It helps. Knowing that things will move on despite what you do, or don’t do; con-

tribute, or don’t contribute, that on the largest scale of things, you simply don’t matter... It’s being reminded that there is that reality outside of one’s self, that’s celebrated in every tree, flower and insect.

3) **Who can you call at 3 am?** I don’t like asking for help. There are very few things in life that warrant waking someone up in the middle of the night for. Their safety or liberty better be at risk, or it can wait until after I’ve had my iced coffee. There are exceptions to the above.

4) **Surround yourself with other successful lawyers you look up to, and successful people you look up to.** I don’t like the idea of seeking out people that are a model for “success.” Because I don’t know what that means. I see unhappy wealthy people that have obtained judgments for clients against unwinnable odds. Is there something to learn from being around them? Sure.

However, my current disposition is to surround myself with as wide a scope in personalities as possible. The idea is to expand my own tolerances and capabilities. Force-fitting myself into only being around “winners” or “the successful” seems wrong. Working my way from the bottom to the top, only to discard all those I walked on to get here, so I can distance myself further from the “losers” or the “unsuccessful”? I suppose we would need to concern ourselves with what exactly being successful is. I’m content with a sufficient amount of stress/selective pressure to expand myself (more power, more control, more money,

deeper connections/ trust, better coping abilities etc.).

5) **Ask for help, admit you need it.** I don’t like asking. It feels like a concession. I appreciate that one cannot go through life without asking for things. That’s tough enough, like a negotiation where you lower your offer and the other side doesn’t move — because asking doesn’t mean getting. That is a deference of sorts. It’s letting someone else make the choice for you. It’s an admission against interest. It’s the feeling of moving from your position and negotiating against yourself. I don’t feel like begging for justice. I’d rather show someone what justice is.

*...my
current
disposition is to
surround myself
with as wide a scope
in personalities as
possible.*

We were asked what we took pride in. I heard a lot of fantastic answers. I especially liked one colleague’s answer, describing an Easter-egg hunt for files that just need to be shined up using his particular perspective to build a file and tell a story in a way that works with that client. He’s got the Midas touch — he’s been turning s#%@ into gold for a long time.

Such thoughtful answers to the five concepts that Chris put out there for you to think about. You’re definitely in the right profession.

Although brain dumping takes time away from the small amount of time you have at the end of your day, it shouldn’t be underestimated as an awesome tool to release some of your days’ work and energy.

Thanks for taking the time to share your thoughts in this WIL. —Beth

The **BACK PAGE**

ASK FOR THE APPOINTMENT!

**Reading This
List Will Give You
Great Ideas for Your
Own Practice!**

ASK for the appointment regardless of the business you're in — auto repair, retail, health insurance, pest control, dentistry, real estate investor, loan officers, tree service, legal — JUST ASK!

David Falin at **Shelly Leeke Law Firm** writes, "First, I want to thank you for taking the time to give us that presentation. I found it very helpful and liked how you had everyone involved. I learned how to turn a prospective client into a zealot and not just an advocate. Key factors that play into that are making yourself available to clients, keeping the message consistent, taking moods and feelings into consideration when communicating with clients/prospective clients (most of them are very anxious and worried when they come to us) and committing myself to each and every client/case as well as following up with clients. I also learned that it's important to consider common barriers when

taking on a new client — these may include negative feelings about attorneys, ignorance of the law, other law firms and price concerns. Thank you again for everything!"

Andrea Meeks at **Marcari, Russotto, Spencer & Balaban** says she learned how important it is to "educate all of the staff on our marketing efforts, strategy and brand to ensure we are all on the same page. I plan to be more conscious of making sure everyone is aware of marketing efforts. I plan to assist in coming up with a list of what sets us apart from other law firms and implementing the sales pitch firm wide."

Caroline Hughes at **Bart Durham** writes, "Today I learned a new, helpful way to stay focused while on a call and to improve my ability to care for clients. Chris told me to do everything I can to imagine and visualize the caller I'm speaking to as well as try to empathize with their experiences."

Humanizing the person on the other end of the phone will be another way to make sure every call is gold and I'm excited to see how I improve with this technique."

Cheryl Leitner at the **Steffens Law Firm** writes, "As I listen to other people take calls, I examine my own calls to see if I do all the things on the script. I realize I need to check in more and make the caller feel more comfortable. The best way I know to correct this is to study my script and notes more."

Emily at the **Law Office of James R. Snell, Jr.** says she learned that a compassionate interrupt is not rude. "I have a very hard time doing those because I feel like I'm being rude. The compassionate interrupt is for rerouting a call and making sure we have control over the phone call. I'm going to practice compassionate interrupts more when people start rambling. I just need to understand that it's not rude and it's okay."

Changes, cont. from page 5

cluding defining individual roles and contributions. It's about buy-in.

Empowering Others to Act on the Vision: When critical constraints or roadblocks are identified, they must be removed or overcome quickly. This means allocating resources accordingly. Systems or structures that can undermine the change must be eliminated. Empowerment involves trust and allowing people to use their initiative and creativity.

Planning for and Creating Short-term Wins: Milestones need to be set up to mark progress and allow victory celebration along the change path. Success breeds success, and excitement breeds excitement. Create that success and excitement by setting

interim goals that can be achieved and celebrated. Recognize and reward employees accordingly that are part of the accomplishments.

Declaring Victory too Soon: Interim success and short-term victories are important, but don't spike your own Kool Aid. Be realistic and keep your long-term goals in sight. Consolidate those short-term improvements to produce continuing change. Use increased credibility to change systems, structures and policies that don't fit the vision. Hiring, promoting and developing employees who can implement the vision is essential to continued success during a major change effort. Reinvigorate the process with new projects, themes and change agents.

Institutionalizing New Approaches: Success must be anchored as it occurs and then built upon by articulating the connections between the new behaviors and corporate success. Leverage this success to ensure leadership development and succession.

Make no mistake, effective leadership is about creating change. This is true in every circumstance, whether a company is facing restructuring or dealing with the challenge of accelerated growth. Change is the defining moment that identifies true leaders from imposters. To become an effective leader, understanding change, creating change and, most importantly, managing change is the first prerequisite.