


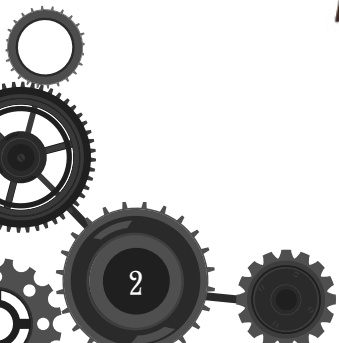
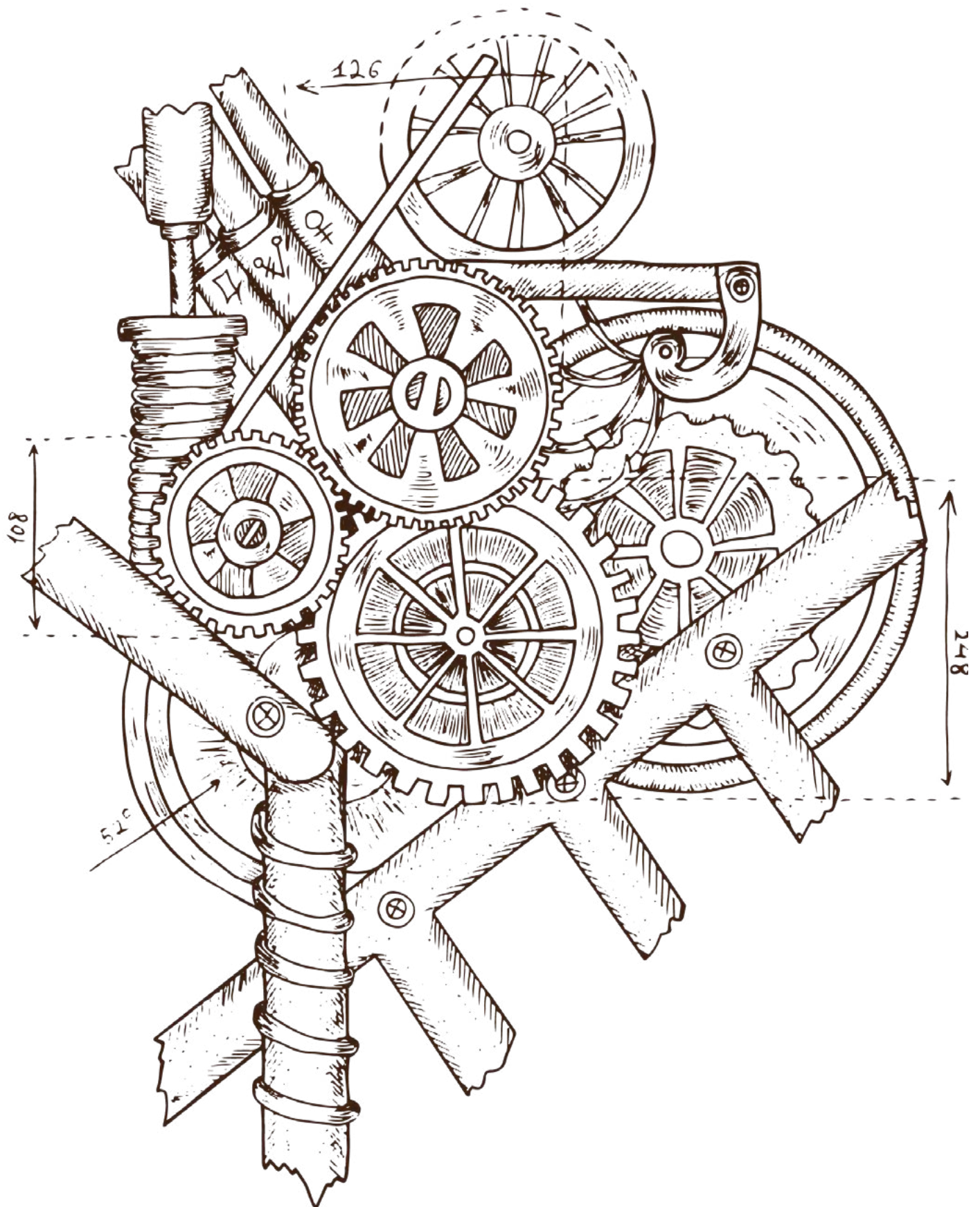


BUILDING YOUR AUTOMATIC
REFERRAL MACHINE



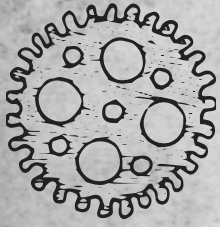
OCT 2021 | LQM
SEATTLE, WA

HOW TO
MANAGE
A SMALL
LAW FIRM
HAPPY LAWYERS MAKE MORE MONEY



AGENDA

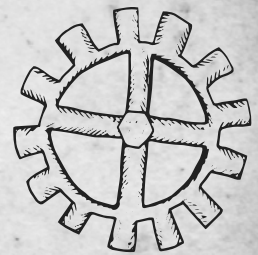
SATURDAY



- | | |
|---------------------|------------------|
| 9:00 AM - 10:30 AM | Session 1 |
| 10:30 AM - 11:00 AM | Break |
| 11:00 AM - 12:30 PM | Session 2 |
| 12:30 PM - 1:30 PM | Lunch |
| 1:30 PM - 3:00 PM | Session 3 |
| 3:00 PM - 3:30 PM | Break |
| 3:30 PM - 5:00 PM | Session 4 |
| 5:00 PM - 5:30 PM | Break |
| 5:30 PM - 7:00 PM | Session 5 |
| 7:00 PM - 9:00 PM | Dinner |
| 9:00 PM - 11:00 PM | <u>Unplugged</u> |

SUNDAY

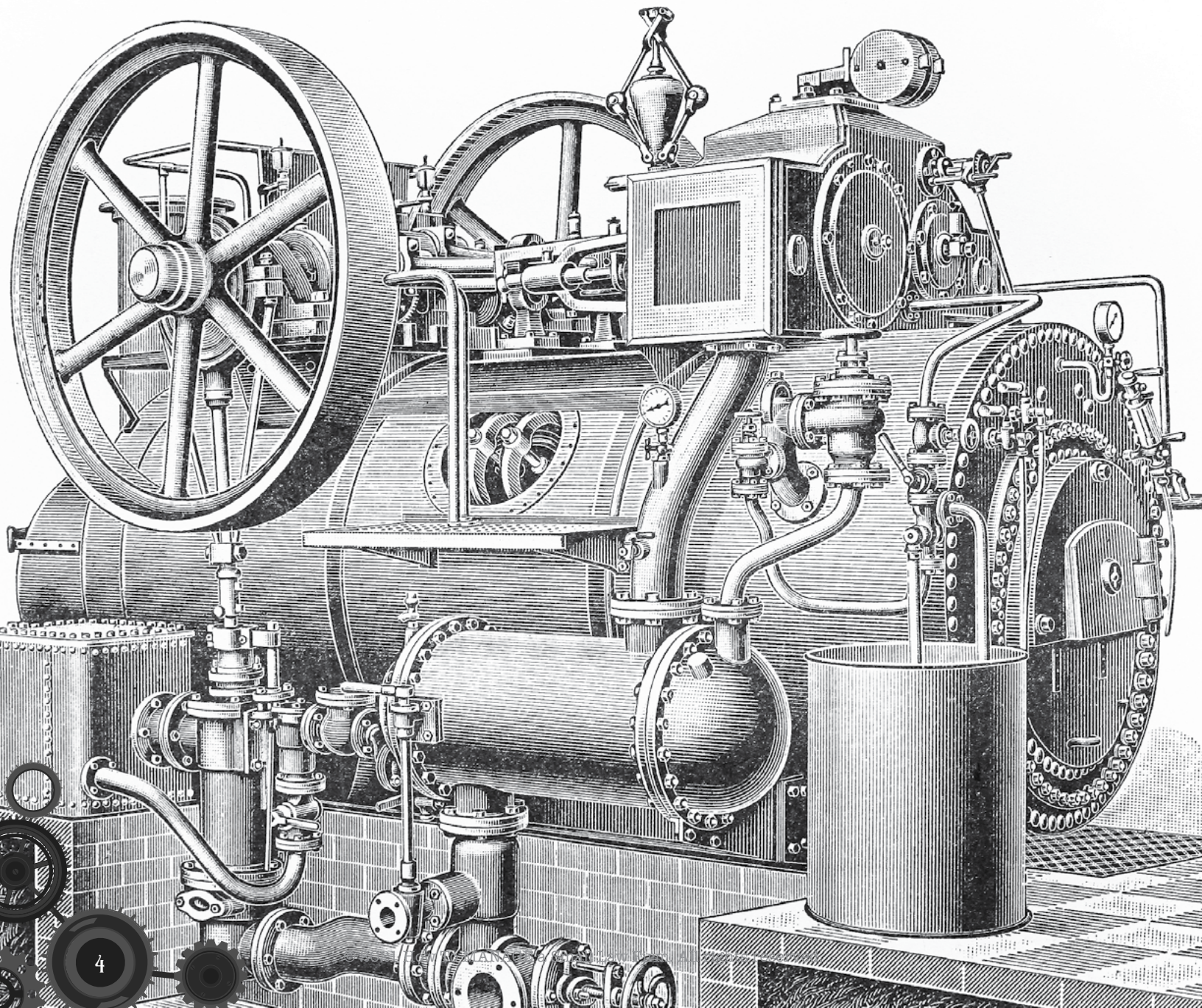
- | | |
|---------------------|------------------------|
| 9:00 AM - 10:30 AM | Session 6 |
| 10:30 AM - 11:00 AM | Break |
| 11:00 AM - 12:30 PM | Session 7 |
| 2:00 PM - 6:00 PM | Implementation Session |



This session is included in the cost of your membership for members with COO and/or CFO services. Or you can purchase a ticket by making a charitable donation at Resources Table.

“A good plan, violently executed now, is better than a perfect plan next week.”

- George Patton





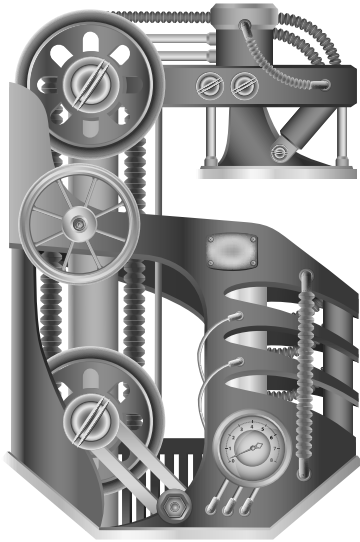
SATURDAY

9:00 AM - 10:30 AM

SESSION I

HOW TO
MANAGE
A SMALL
LAW FIRM

HAPPY LAWYERS MAKE MORE MONEY



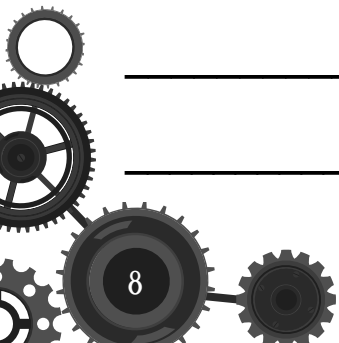
COMMANDMENTS OF BUILDING A REFERRAL MACHINE

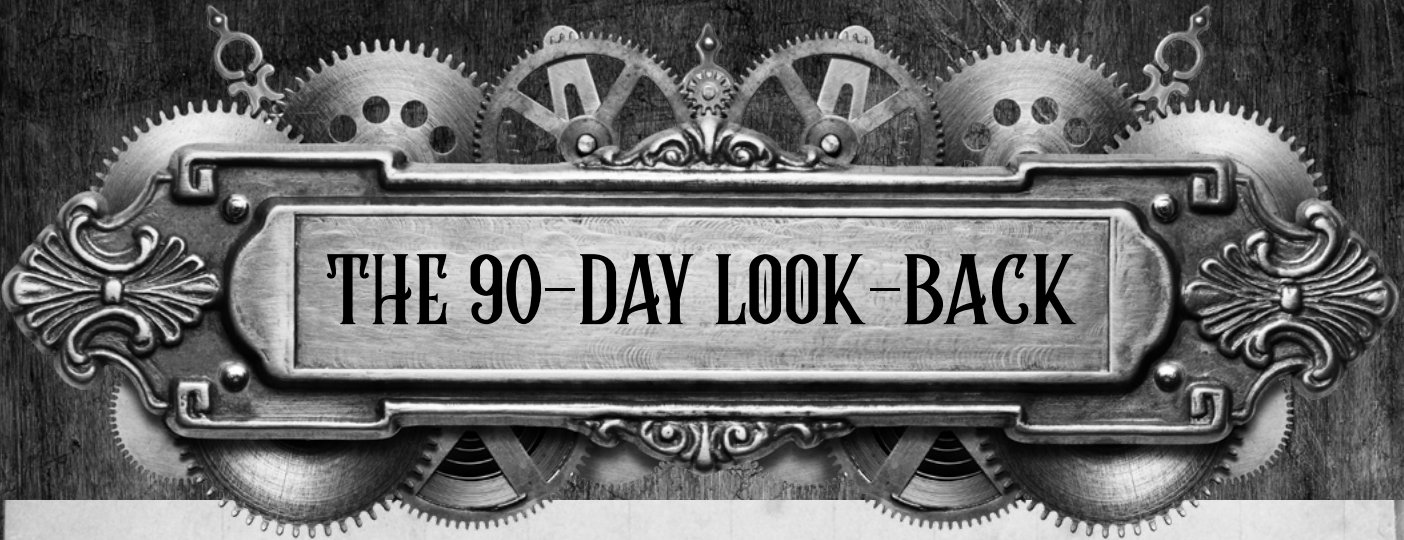


1. Tune into WIIFT – **What’s In It For THEM**
 - Don’t _____
assume | guess | be an idiot
2. Make it easy for THEM
3. Make it consistent
4. Make it measurable
5. Make it delegable
6. Make it fun for you... or else it will feel too much like “work” and you’ll stop doing it before you can get enough positive reinforcement to keep it going.







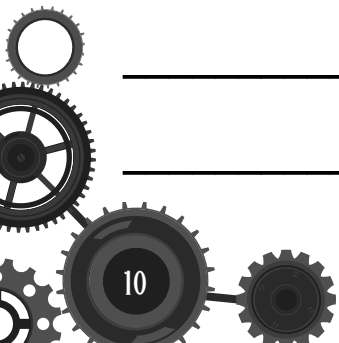


THE 90-DAY LOOK-BACK

WHAT ARE YOUR MOST IMPORTANT ACHIEVEMENTS FROM THE LAST 90 DAYS?

ACHIEVEMENT	HOW DOES THIS MOVE YOU (MEASURABLY) CLOSER TO YOUR GOALS?	FURTHER PROGRESS
FINANCIAL		
PERSONAL		
PROFESSIONAL		





BEST OF SESSION I



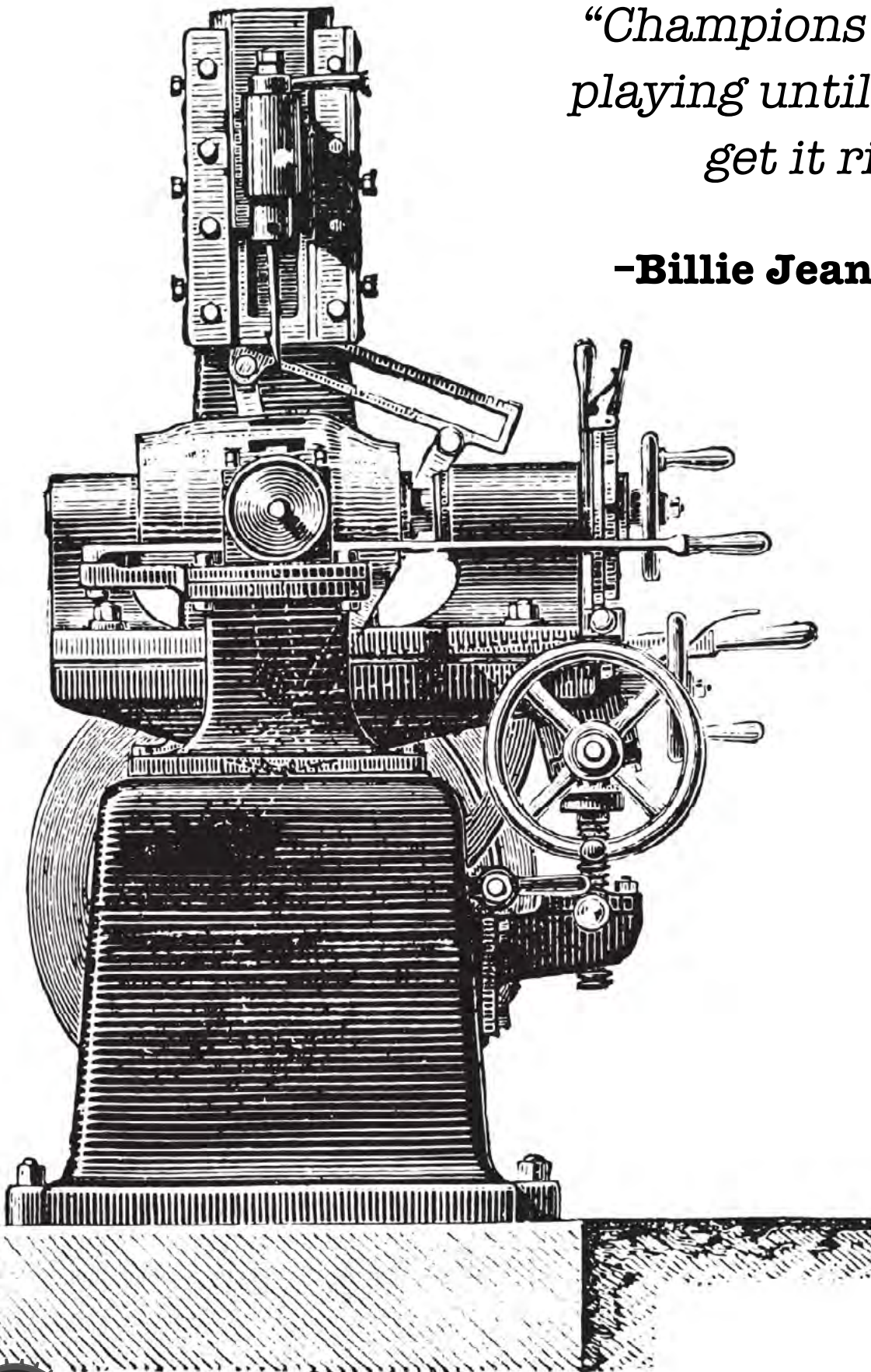
IDEAS TO IMPLEMENT	BEST FIRST ACTION(S)
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② <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	
③ <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	
④ <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	
⑤ <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	

Which idea on this page, if implemented, would have the biggest positive impact on your business and / or life?

#

“Champions keep playing until they get it right.”

-Billie Jean King





SATURDAY

11:00 AM - 12:30 PM

SESSION II

HOW TO
MANAGE
A SMALL
LAW FIRM

HAPPY LAWYERS MAKE MORE MONEY

CALCULATE THE VALUE OF A REFERRAL TO YOUR FIRM

1. Cost of Acquisition

Total Marketing Spend: \$ _____

÷

Number of New Clients: _____

Cost of Acquisition: \$ _____

2. Transactional - Average Case Value

Total Revenue: \$ _____

÷

Number of Cases Closed
During the Same Period: _____

Average Case Value: \$ _____

3. Transactional (Better) - Avg. Gross Profit Per Case

Total Revenue - Cost of Goods Sold
(Related to that Revenue) \$ _____

÷

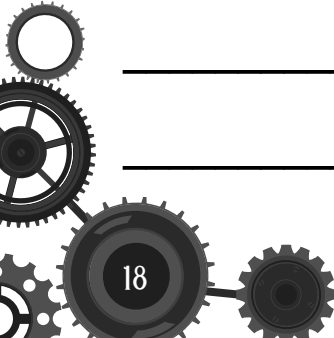
Total Cases _____

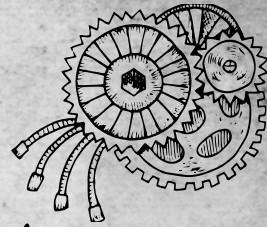
Average Gross Profit Per Case: \$ _____

4. Lifetime Value of a Client

- A. Add on services
- B. Comes back for a second case/matter
- C. Refers the occasional family member to the firm.
- D. Provides referral opportunities for the firm
- E. Client makes it their business to make referrals to your law firm. (*This law firm is part of my own marketing/influence eco system.*)







Calculate the Value of Building a Machine

Referrals/year

	1	2	3
1	1	2	3
2	2	4	6
3	3	6	9

A. $1 \times 1 = 1 \times \text{Average Gross Profit} =$ \$ _____

B. $3 \times 3 = 9 \times \text{Average Gross Profit} =$ \$ _____

C. $B - A = C:$ \$ _____

D. $(C \div A) \times 100 =$ _____ %

“D” = How much more valuable a referral machine is vs. waiting around for referrals.

.....

E. I am (_____ ft x 12 = _____ in.) + _____ in. tall = $\frac{\text{Total Inches Tall}}{\text{Total Inches Tall}}$

Example: I am (5 ft (x 12) = 60 in.) + 7 in. tall = Total 67 inches tall

F. $\frac{\text{Total Inches}}{\text{Total Inches}} \times \frac{\text{(D)}}{\text{(D)}} = \frac{\text{Total Inches}}{\text{Total Inches}} \div 12 = \frac{\text{My New Height}}{\text{My New Height}}$

Example: $67 \times \frac{800\%}{(8.0)} = 536 \div 12 = 44.6 \text{ ft tall}$

G. $E \div D =$ _____ in. tall

Example: $67 \text{ in} \div 8 = 8.4 \text{ in. tall}$
(This demonstrates the opportunity cost of not having a referral machine.)



My Firm Helps People Solve
_____ Problem(s)

.....

THINGS THEY ARE THINKING ABOUT

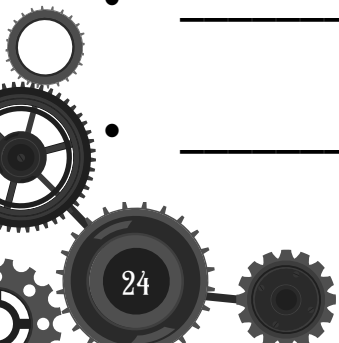
.....

Because a person is having this kind of legal problem(s), I know they're probably also having these other kind of problems:

- _____
- _____
- _____
- _____

Because my firm has helped them solve this problem, I know they are probably thinking about these opportunities:

- _____
- _____
- _____



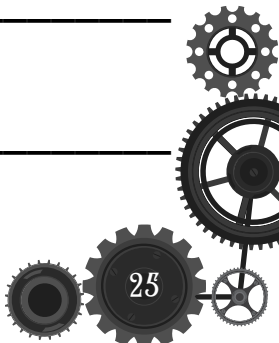
.....
THINGS THEY SHOULD BE THINKING ABOUT
.....

Because they're probably dealing with these other issues in their life (problems/opportunities), I know they should probably be thinking about these other issues/opportunities, but aren't possibly because this is an issue of first impression for them in their life (but not for me):

- _____
- _____
- _____

People/professionals who are in a position of trust and respect who also have the education, experience and who have a system for helping MY FIRM'S CLIENTS deal with any or all of these issues.

- _____
- _____
- _____



..... LQM BUDDY FORM

Your Name: _____ Buddy's Name: _____

THE PERSONAL STUFF

Are they married? Yes No

What does their spouse do? _____

Do they have any children, and if so what ages? _____

THE PROFESSIONAL STUFF

How long have they had their own firm? _____

Why did they open their own firm? _____

Why did they choose their practice area? _____

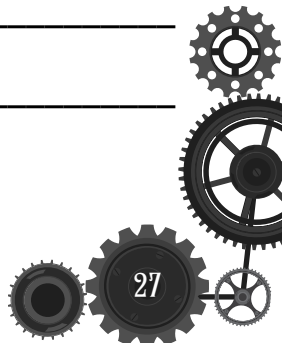
THE FUTURE STUFF

Describe what they want to build with their firm (can describe it in revenue, or the life they want to build through their firm). _____

OTHER STUFF

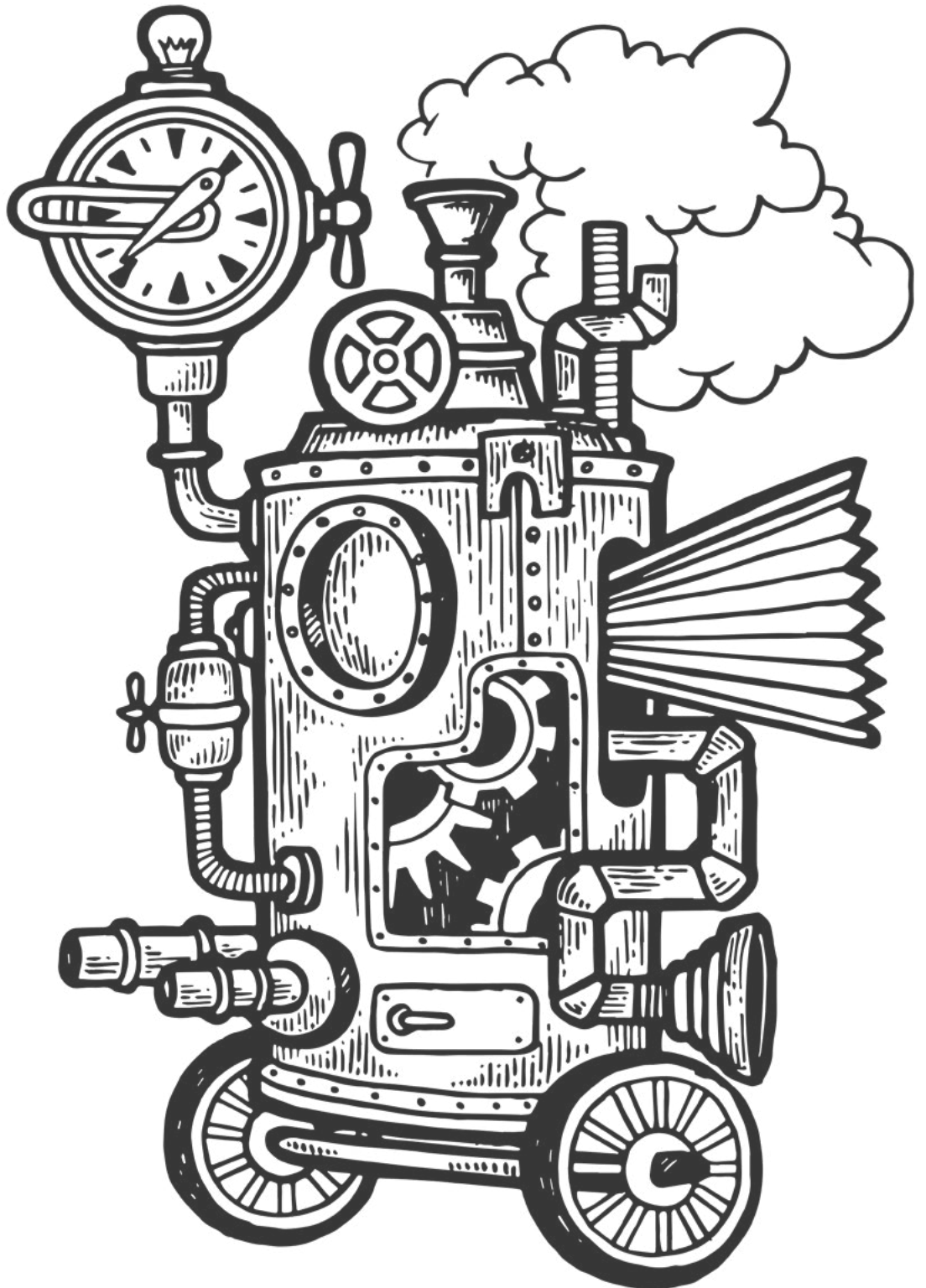
Is there anything you think their Practice Advisor should know about your Buddy?

Please complete the form, carefully rip it from your workbook and return to the Resource Table.



“Done is better than perfect.”

- Sheryl Sandberg







BEST OF SESSION II



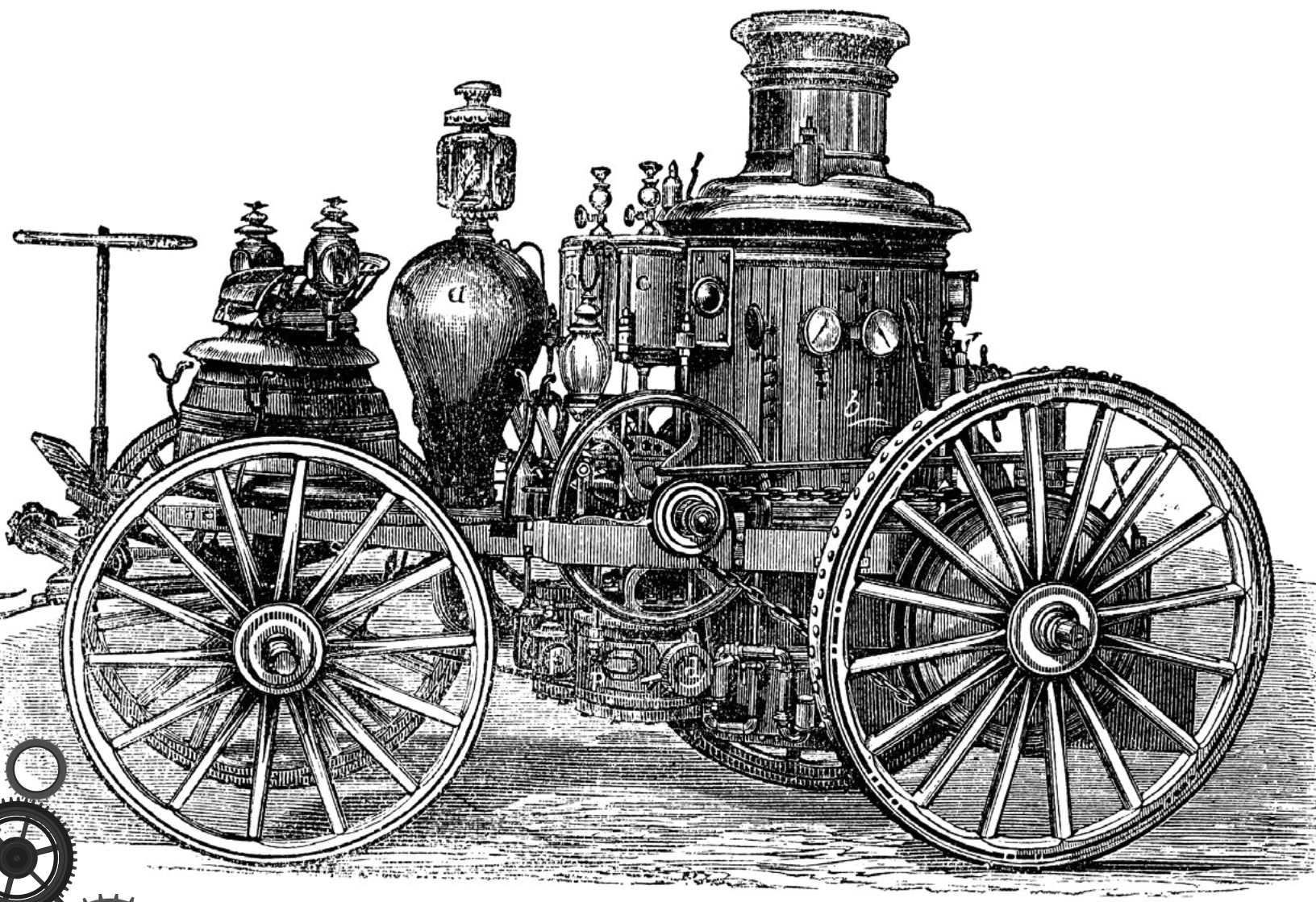
IDEAS TO IMPLEMENT	BEST FIRST ACTION(S)
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③ <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	
④ <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	
⑤ <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	

Which idea on this page, if implemented, would have the biggest positive impact on your business and / or life?

#

“In preparing for battle I have always found that plans are useless, but planning is indispensable.”

-Dwight D. Eisenhower



The background of the entire page is a complex, intricate steampunk-style illustration. It features a dense arrangement of various gears, cogs, and mechanical components. At the top, a large, stylized sun or gear with eight points is centered. Below it, the word "SATURDAY" is written in a large, white, serif font. Underneath that, the time "1:30 PM - 3:00 PM" is displayed in a smaller, white, sans-serif font. In the center of the page, a large, dark, circular area contains the text "SESSION III" in a white, serif font. At the bottom of this circle, there is a logo for "HOW TO MANAGE A SMALL LAW FIRM" and the tagline "HAPPY LAWYERS MAKE MORE MONEY". The entire design is framed by a decorative border of gears and mechanical parts.

SATURDAY

1:30 PM - 3:00 PM

SESSION III

HOW TO
MANAGE
A SMALL
LAW FIRM

HAPPY LAWYERS MAKE MORE MONEY

.....

ENGINEERING A REFERRAL CONVERSATION INTO EVERY CLOSING

.....

Hello, my name is _____.

I'm calling from the XYZ law firm, how are you today?

Enter anecdote about their case if it's appropriate...

Example:

- *Congratulations on your new home! (real estate)
We're really proud to have been able to help you.*
- *Just want to let you know there are no issues
with your prior case, I am actually calling
with some good news (criminal, immigration,
bankruptcy)*

When you hired our firm, you probably remember us saying that you're not going to be just another case to us. And you're not just going to be another client.

You're a person. And we're not going to forget about you, just because your case or matter is concluded. You are our client for life, and we're committed to having a long-term relationship with people that we work with.

So, you may also remember that we said we'd be calling you, after your case is over to check in on you and be sure you're doing ok and help you get on with the next part of your life.

Well, that is what this call is all about. This is our client appreciation call to just check-in with you—Is this a good time to speak?

As you can probably imagine, we handle hundreds of XXXXXXXX every year and we pay attention to the sort of things our clients tell us that they find themselves dealing with after a XXXXXXXXXXXX.

So, instead of allowing our clients who we sincerely value and appreciate... Instead of allowing you to go through all this alone, and instead of just letting you figure it out for yourself, we'd like to help you by sharing some resources we've collected based on the experiences of hundreds of our other clients.

Do you mind if I just run through a short list and ask you some questions to help get you set up with anything you might need?

.....

**I BELIEVE MY FIRM'S AVERAGE CLIENT WILL NEED
REFERRALS TO THE FOLLOWING CATEGORIES:**

.....

- Legal services:

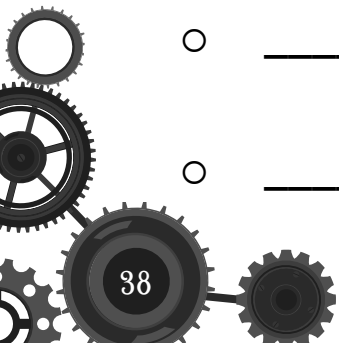
- _____
- _____
- _____

- Financial services:

- _____
- _____
- _____

- Insurance services:

- _____
- _____
- _____



- Healthcare/personal appearance:

- _____
- _____
- _____

- Real estate services

- _____
- _____
- _____

- Consumer goods (car, furniture, “toys”)

- _____
- _____
- _____

- Personal / Domestic services (lawncare, handyman, contractor, personal shopper, home staging):

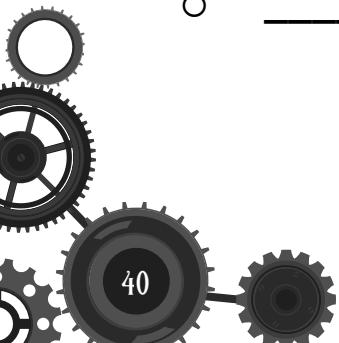
- _____
- _____
- _____

- Education / Career Training

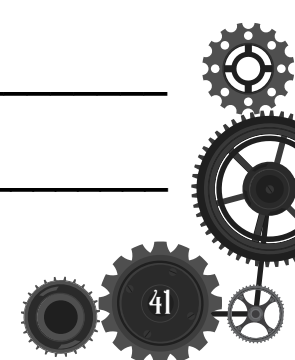
- _____
- _____
- _____

- Other

- _____
- _____
- _____







If 1 out of 10 (10%) accept my offer of help, my firm will be in a position to make $\frac{20 \text{ (200 cases/yr)}}{(H)}$ referrals out per year.

If we make $\frac{20}{(H)}$ referrals out per year and 1 out of 10 (10%) makes a referral back, my firm should become the beneficial recipient of $\frac{2}{(H \times .10 = "I")}$ referrals per year just from those referrals that we made out.

.....

Cost of Acquisition.:

$$\text{\$ } \frac{1,000}{\text{_____}} \times \frac{2}{(I)} = \text{\$ } \frac{2,000}{\text{_____}}$$

Average Gross Profit per Case:

$$\text{\$ } \frac{3,000}{\text{_____}} \times \frac{2}{(I)} = \text{\$ } \frac{6,000}{\text{_____}}$$

If 1 out of 10 (10%) accept my offer of help, my firm will be in a position to make _____ referrals out per year.
(H)

If we make _____ referrals out per year and 1 out
(H)
10 (10%) makes a referral back, my firm should become the beneficial recipient of _____ referrals per year just
(H x .10 = "I")
from those referrals that we made out.

.....

Cost of Acquisition.:

$$\text{\$ } \underline{\hspace{2cm}} \text{ x } \underline{\hspace{2cm}} \text{ (I)} = \text{\$ } \underline{\hspace{2cm}}$$

Average Gross Profit per Case:

$$\text{\$ } \underline{\hspace{2cm}} \text{ x } \underline{\hspace{2cm}} \text{ (I)} = \text{\$ } \underline{\hspace{2cm}}$$

BEST OF SESSION III



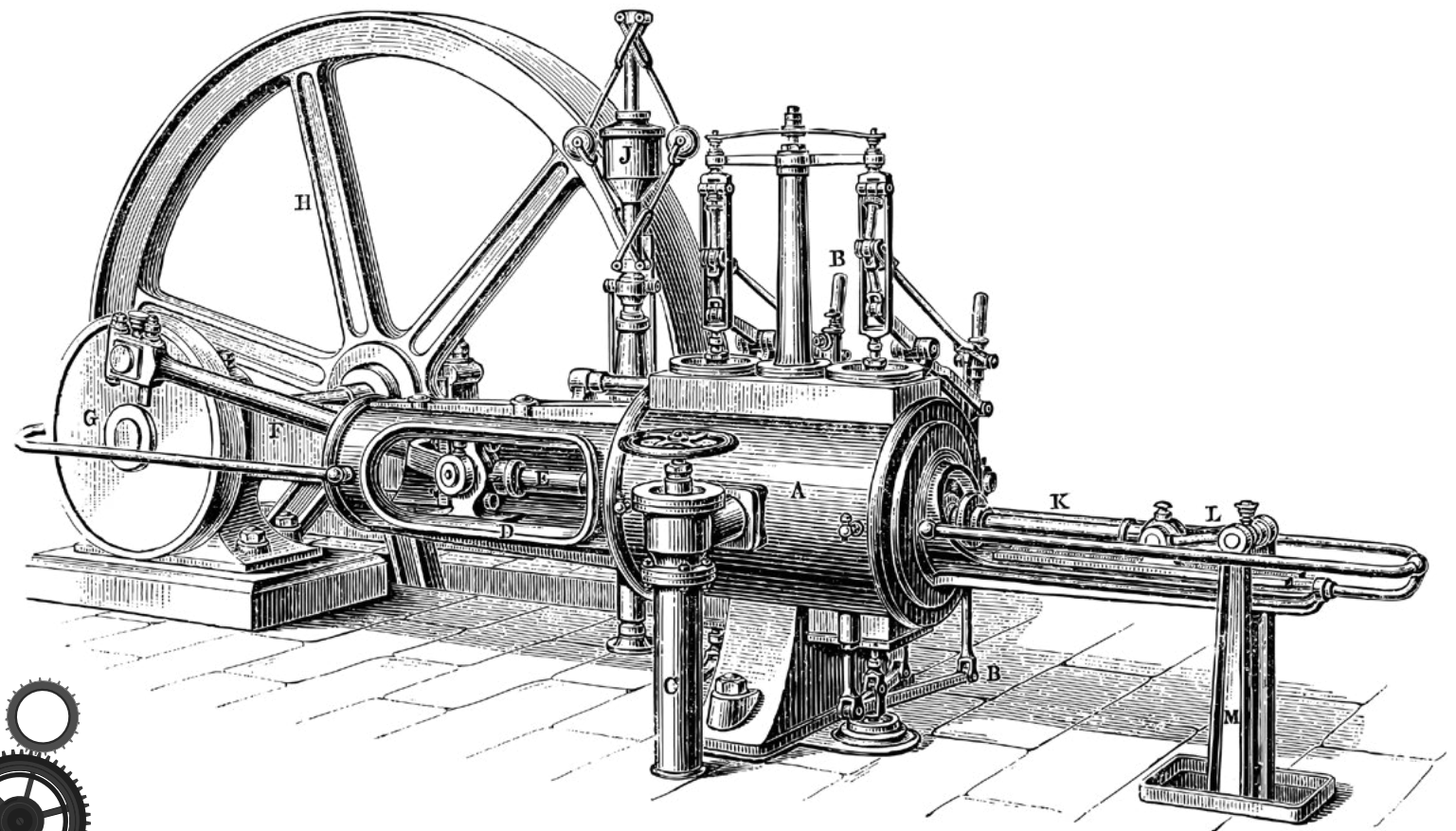
IDEAS TO IMPLEMENT	BEST FIRST ACTION(S)
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② <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	
③ <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	
④ <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	
⑤ <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	

Which idea on this page, if implemented, would have the biggest positive impact on your business and / or life?

#

“Fundamental preparation is always effective. Work on those parts of your game that are fundamentally weak.”

-Kareem Abdul-Jabbar





SATURDAY

3:30 PM - 5:00 PM

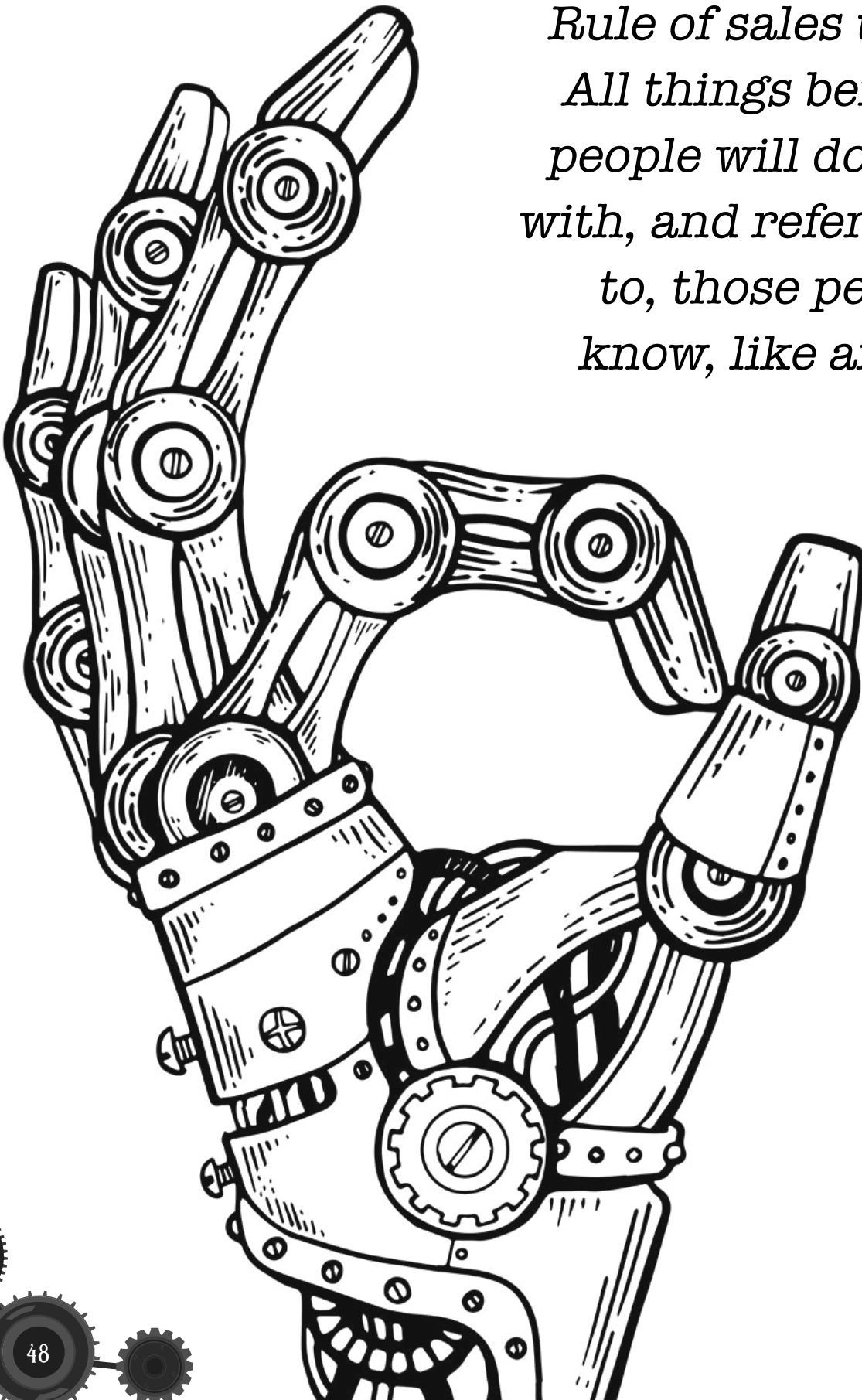
SESSION IV

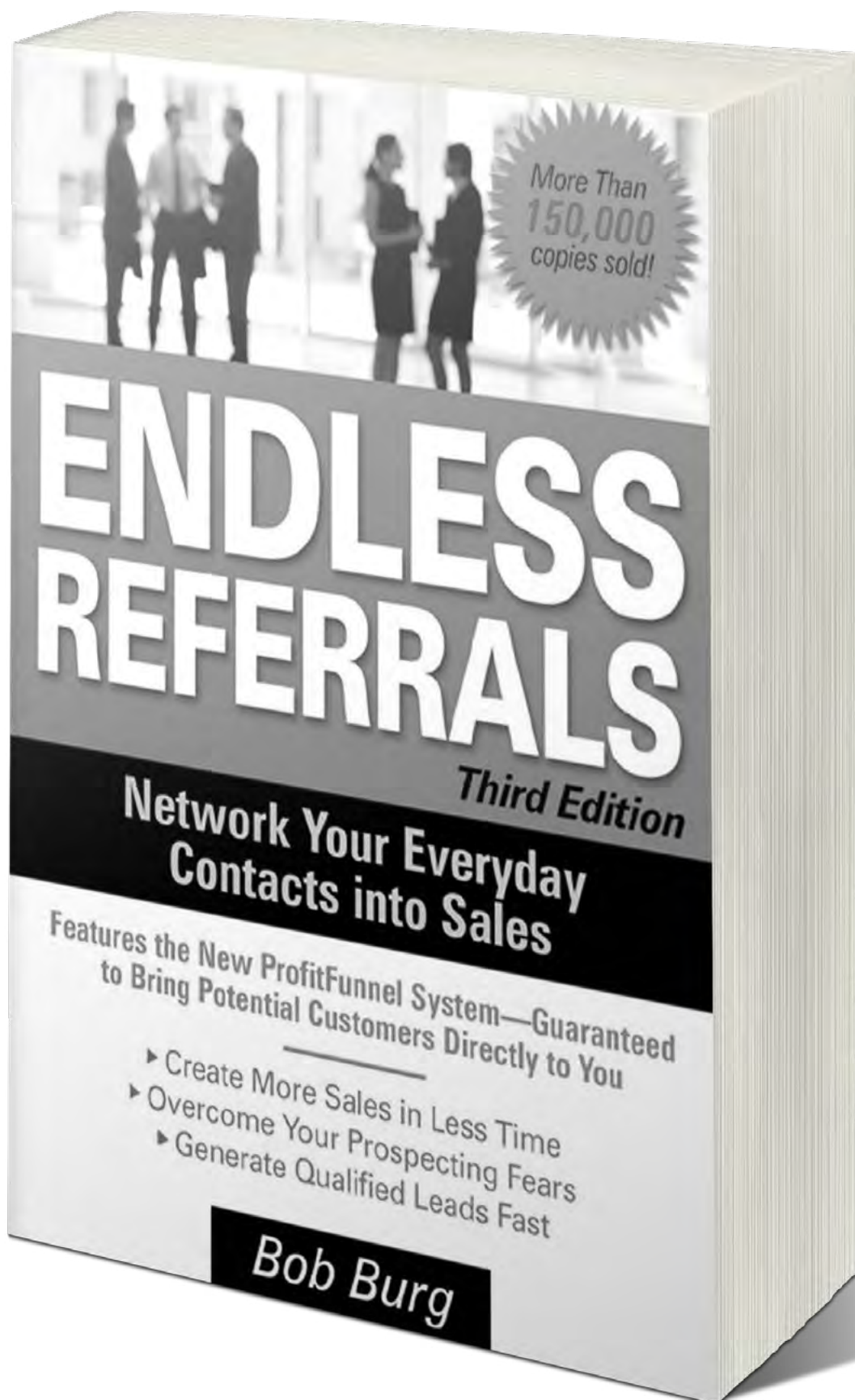
HOW TO
MANAGE
A SMALL
LAW FIRM

HAPPY LAWYERS MAKE MORE MONEY

“Internalize the Golden Rule of sales that says: All things being equal, people will do business with, and refer business to, those people they know, like and trust.”

-Bob Burg





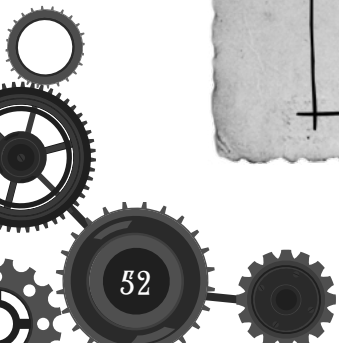


WARNING!

WHAT FOLLOWS
WILL ERASE ALL OF
YOUR EXCUSES.



Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				





Series of horizontal lines for writing notes.





Strategic Gift Giving Campaign

Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				



Lined area for notes with horizontal lines.





Becoming The Connector

Tue.	Wed.	Thu.	Fri.	Sat.		
	4	5	6	7		
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Pick a restaurant - high end with a private room.

Contact owner/manager and tell them you want to book a table same day of the month for the rest of the year (they'll treat you like VIP).

Make a list of all the people who are and should be referring business to your firm - Second list of the ones who really should be referring business to each other.

Invite them to lunch in groups of 3.



.....
Sample email to send instructing your referral source to be on the lookout for an invitation to lunch:
.....

Dear _____,

I know, like, and trust you. Your firm is a “go-to” resource for me when it comes to XXXXXX. I’d like to introduce you to a couple of people who I think you would benefit from knowing. I think once they get to know you, they’d each be in a position to refer business to you.

(NAME 1) is a well-respected advisor to _____. He/she has helped (you or your clients) in _____. I think he/she may be a good resource for you in/because _____.

(NAME 2) is a renowned _____. He/she has helped (you or your clients) in _____. I think he/she may be a good resource for you in/because _____.

I’ve sent a more formal invitation to join us for lunch on (date) at (time) at (place).

Please be on the lookout for that invitation which I mailed to (address). In the meantime, if you already know you can make it or can’t make it, or you’d like me to invite you for another time, please visit www.lunchinvitationRSVPpage.com.

Thanks,

(Signature)

P.S. Bring your business partners. Leave your wallet at home—lunch is on me.



.....

SNAIL MAIL (VER A)

.....

Dear _____,

I know, like, and trust you. Your firm is a “go-to” resource for me when it comes to XXXXXX. I’d like to introduce you to a couple of people who I think you would benefit from knowing. I think once they get to know you, they’d each be in a position to refer business to you.

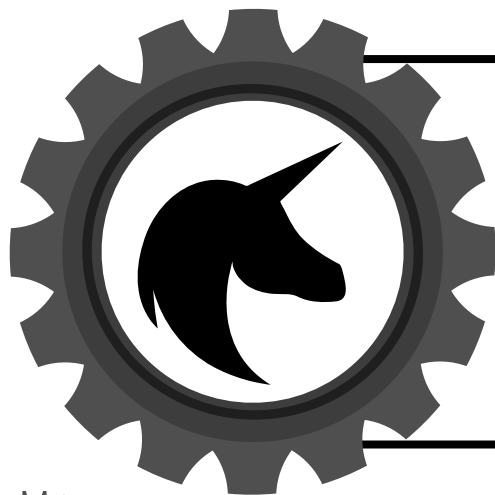
Please join us for lunch on (date) at (time) at (place).

If you can make it, or if you’d prefer I invite you another time, please visit www.lunchinvitationRSVPpage.com.

Thanks,

(Signature)

P.S. Bring your business partners. Leave your wallet at home—lunch is on me.



**WANT TO MAKE SURE THIS
ACTUALLY GETS DONE FOR
YOU EVERY MONTH?**

SNAIL MAIL (VER B)

Same concept, but in the letter you put the names of the people coming.

Dear _____,

I know, like, and trust you. Your firm is a “go-to” resource for me when it comes to XXXXXX. I’d like to introduce you to a couple of people who I think you would benefit from knowing. I think once they get to know you, they’d each be in a position to refer business to you.

(NAME 1) is a well-respected advisor to _____. He/she has helped (you or your clients) in _____. I think he/she may be a good resource for you in/because _____.

(NAME 2) is a renowned _____. He/she has helped (you or your clients) in _____. I think he/she may be a good resource for you in/because _____.

I’ve sent a more formal invitation to join us for lunch on (date) at (time) at (place).

Please be on the lookout for that invitation which I mailed to (address). In the meantime, if you already know you can make it or can’t make it, or you’d like me to invite you for another time, please visit www.lunchinvitationRSVPpage.com.

Thanks,

(Signature)

P.S. Bring your business partners. Leave your wallet at home—lunch is on me.

EXECUTION STEPS

- Send them the invitation inviting them to the lunch for the following month
- Ask them to go to your RSVP page to RSVP
- Send them a confirmation as soon as they RSVP
- Send them a reminder 2 weeks before as a group email introducing each other and saying a few words about why you're looking forward to introducing them.
- Have someone call them a week before to confirm
- Have someone call them to confirm the day before
- Get your staff to use the following script when making the arrangements with the manager of the restaurant for how you want your table to be serviced:



My name is _____,

I work for _____ (Law Firm). (Name of attorney) Would like to invite 3 of his/her friends/colleagues to have breakfast/lunch/dinner at your restaurant and he/she would like to make arrangements ahead of time for a few special accommodations and to pay the bill ahead of time so no one has to argue over it at the end of the meal. Mr./Mrs. NAME would like to leave a 20% tip ahead of time and he/she is looking for a regular spot to host these lunches with different groups of friends/colleagues every month.

Is this something your restaurant can help us out with?

(YES/NO)

(If no, don't try to change their mind. Just be glad their sales prevention department doesn't work for you.)

Assuming they give you an enthusiastic yes (because why wouldn't they) here's what you need to ask for:

1. A private room if possible or else a table that is tucked away in a corner with some privacy
2. The same table every month
3. The same server every month
4. The server should be instructed to please be attentive but then give the party its privacy, with minimum small talk—Be friendly, polite, welcoming, but not standing there gabbing at the table about the day's events.

5. The server will be given the names of each of the guests ahead of time and should greet each of the guests by name. (*“Good afternoon Mr. Smith, thank you for joining us.”*
“Hello Mrs. Brown, I think you’ll really enjoy today’s special.”)
6. Take order as usual.
7. At the end of the meal, thank everyone by name for being a guest at the restaurant that day, and say, “the bill has been taken care of.”
8. A card that says “Reserved” should be on the table.
9. OPTIONAL: Name cards for each of the guests.
10. OPTIONAL: A chef’s special to be offered for the meal “for your party” (“chef knows Mr./Mrs. host loves X so we have today a special with X”)
11. OPTIONAL: At the conclusion of the meal, server delivers envelopes to each guest with a gift certificate for the restaurant and says, “thank you for joining us today. I hope you’ll come back and see us again soon”. Of course, the host (you) paid for the gift certificates ahead of time.)



Use the following script at lunch to make introductions to get the conversation going between everyone:

Thank you for accepting my invitation. I think you're each going to enjoy meeting each other. And I think you're each in a position to benefit from referring business back and forth to each other. Just to break the ice. I thought I'd just begin by making formal introductions and letting you know why I invited each of you to join me for this lunch.

(Point at Andy Apple and say...) This is Andy Apple. He is my "go-to" resource for (apples) or he's my "go-to" resource for green apples. Or he's my "go-to" resource for whenever I need apples in this part of town. Or he's my "go-to" resource for left-handed people who like apples. Or, a lot of my clients ask for help with apples and I didn't have person in my network who I know very well to help my clients with apples, so I did my research and I asked around and Andy Apple's name kept coming up as a trusted purveyor of apples.

(Insert Andy's magic statement if you know it)

And say a few good things which you can say with integrity that Andy would probably be flattered to hear, but would probably be too embarrassed to say about himself.

(Repeat for the other two guests)

After introductions are made, use the following conversation starters if you need to get or keep things going:

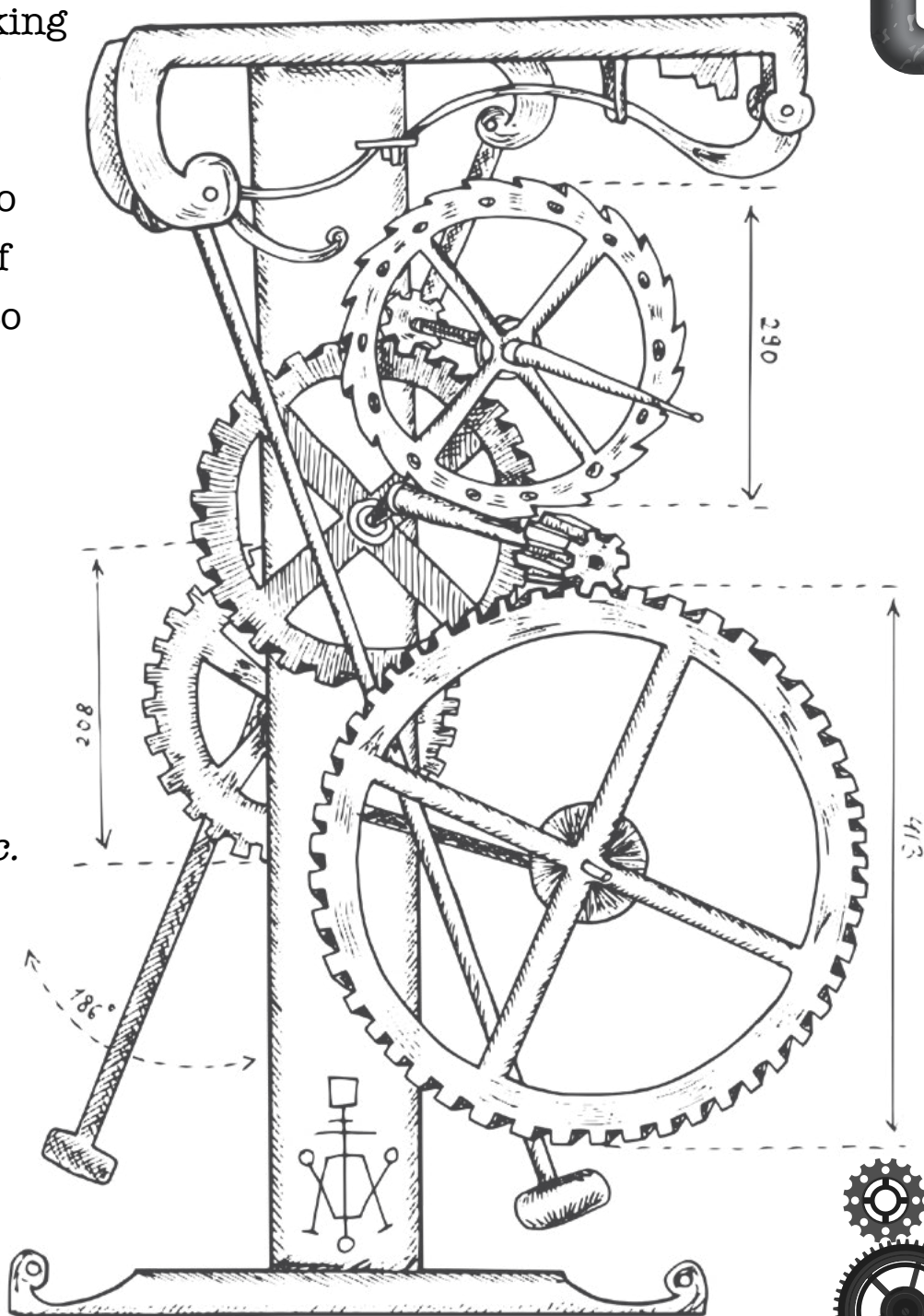
- Barbara Banana, how did you get into the banana business?
- Cathy Cantaloupe, you must have some really great stories about the cantaloupe business. What's one of your favorite stories about people who eat cantaloupes?
- Danny Dragonfruit, what do you think is going to happen in the dragonfruit industry in the next couple of years?
- Eric Eggplant, what are some things we could look for to recognize if someone we're speaking to would be a good prospect for you?
- Franny Fig, if one of us has the opportunity to make a referral to you, what're some things we could say about your business that would set you up for success with the prospect we send your way?
- Garry Grape, what's the best way for us to make referrals to? For example, is there someone specific for us to send our prospects to so they get special treatment?



At the end of lunch, send everyone a follow up email, recapping any notes you took with answers to any of the above questions, and including everyone's contact info.

And then send them a handwritten note thanking them for joining you for lunch, repeating their magic statement back to them, with the words "if I am ever in a position to refer someone who X, I will be sure to send them to you."

NOTE: Do **NOT** say, *please keep me in mind for a referral, because that just makes you seem weak and pathetic.*



BEST OF SESSION IV



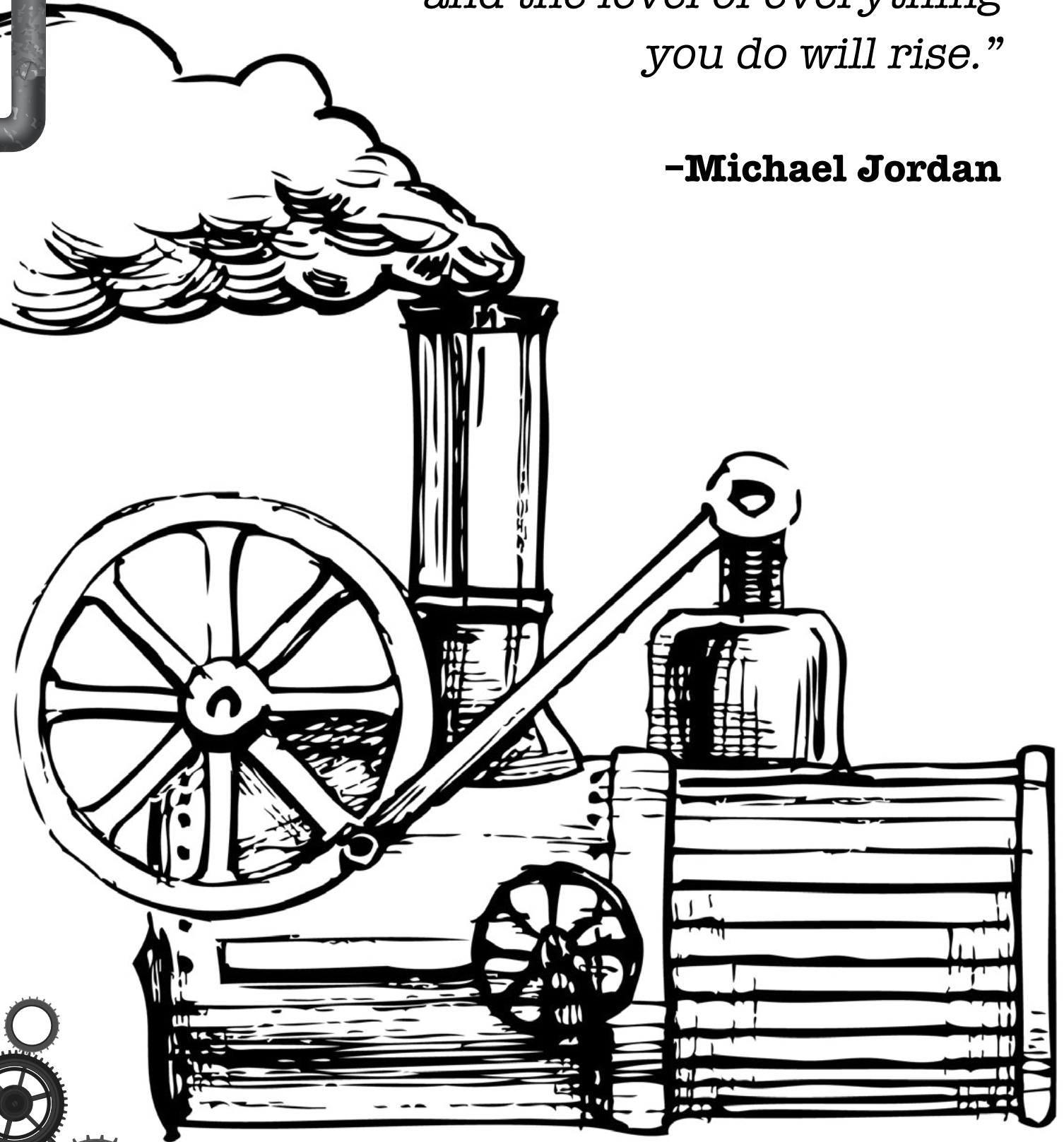
IDEAS TO IMPLEMENT	BEST FIRST ACTION(S)
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Which idea on this page, if implemented, would have the biggest positive impact on your business and / or life?

#

*“Get the fundamentals down
and the level of everything
you do will rise.”*

-Michael Jordan





SATURDAY

5:30 PM - 7:00 PM

SESSION V

HOW TO
MANAGE
A SMALL
LAW FIRM

HAPPY LAWYERS MAKE MORE MONEY

BEST OF SESSION V



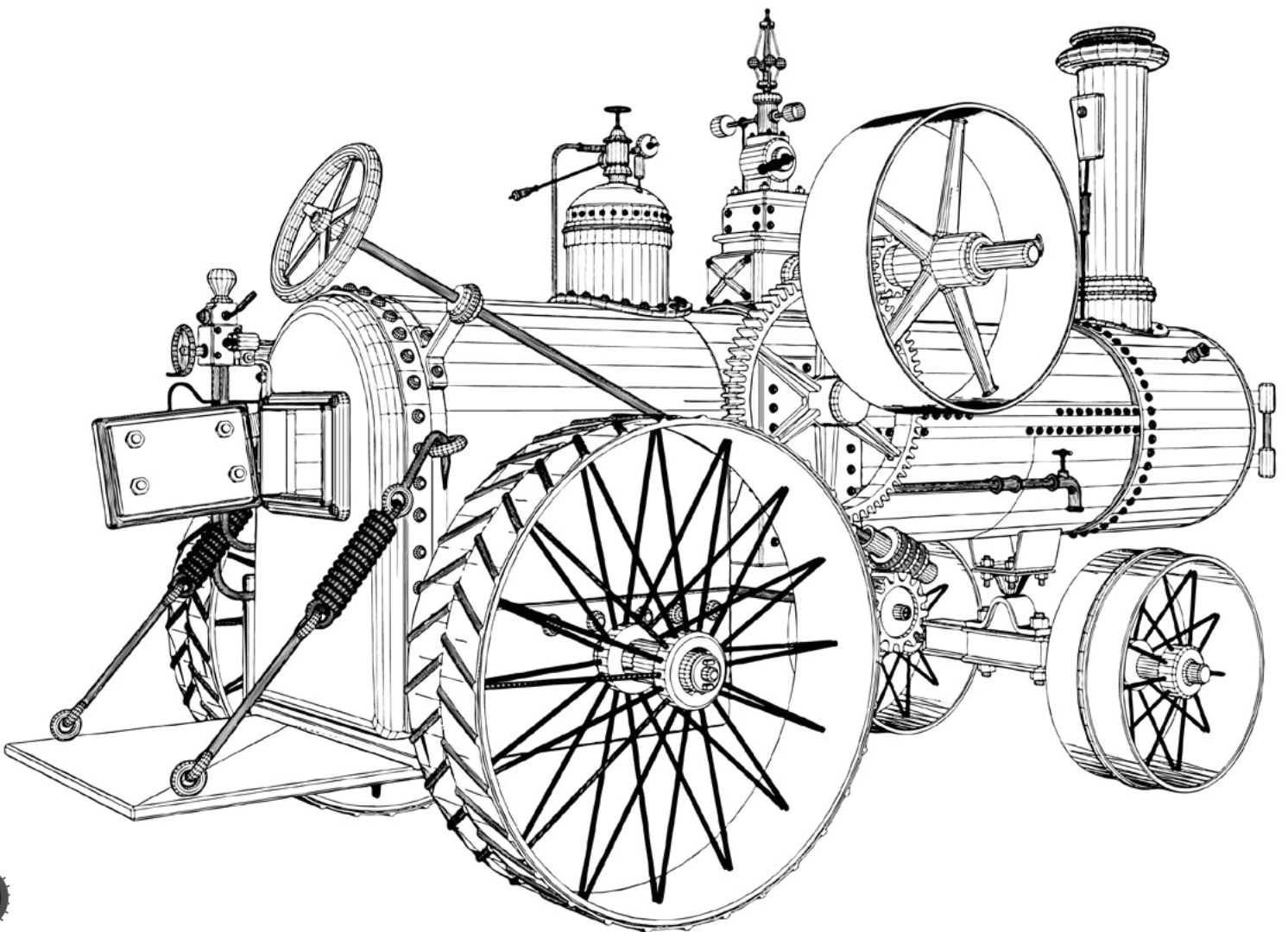
IDEAS TO IMPLEMENT	BEST FIRST ACTION(S)
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⑤ <input type="checkbox"/> Personal <input type="checkbox"/> Professional <input type="checkbox"/> Financial	

Which idea on this page, if implemented, would have the biggest positive impact on your business and / or life?

#

“I didn’t get there by wishing for it or hoping for it, but by working for it.”

-Estée Lauder



The background of the entire page is a complex, intricate steampunk-style illustration. It features a dense arrangement of various gears, cogs, and mechanical components. At the top, a large, stylized sun or gear with eight points is centered. Below it, the word "SUNDAY" is written in a large, bold, serif font. Underneath "SUNDAY" is the time "9:00 AM - 10:30 AM" in a smaller, sans-serif font. In the center of the page, a large, dark circular area contains the text "SESSION VI" in a large, bold, serif font. At the bottom of this circle, there is a logo for "HOW TO MANAGE A SMALL LAW FIRM" with the tagline "HAPPY LAWYERS MAKE MORE MONEY". The entire design is framed by a decorative border of gears and mechanical parts.

SUNDAY

9:00 AM - 10:30 AM

SESSION VI

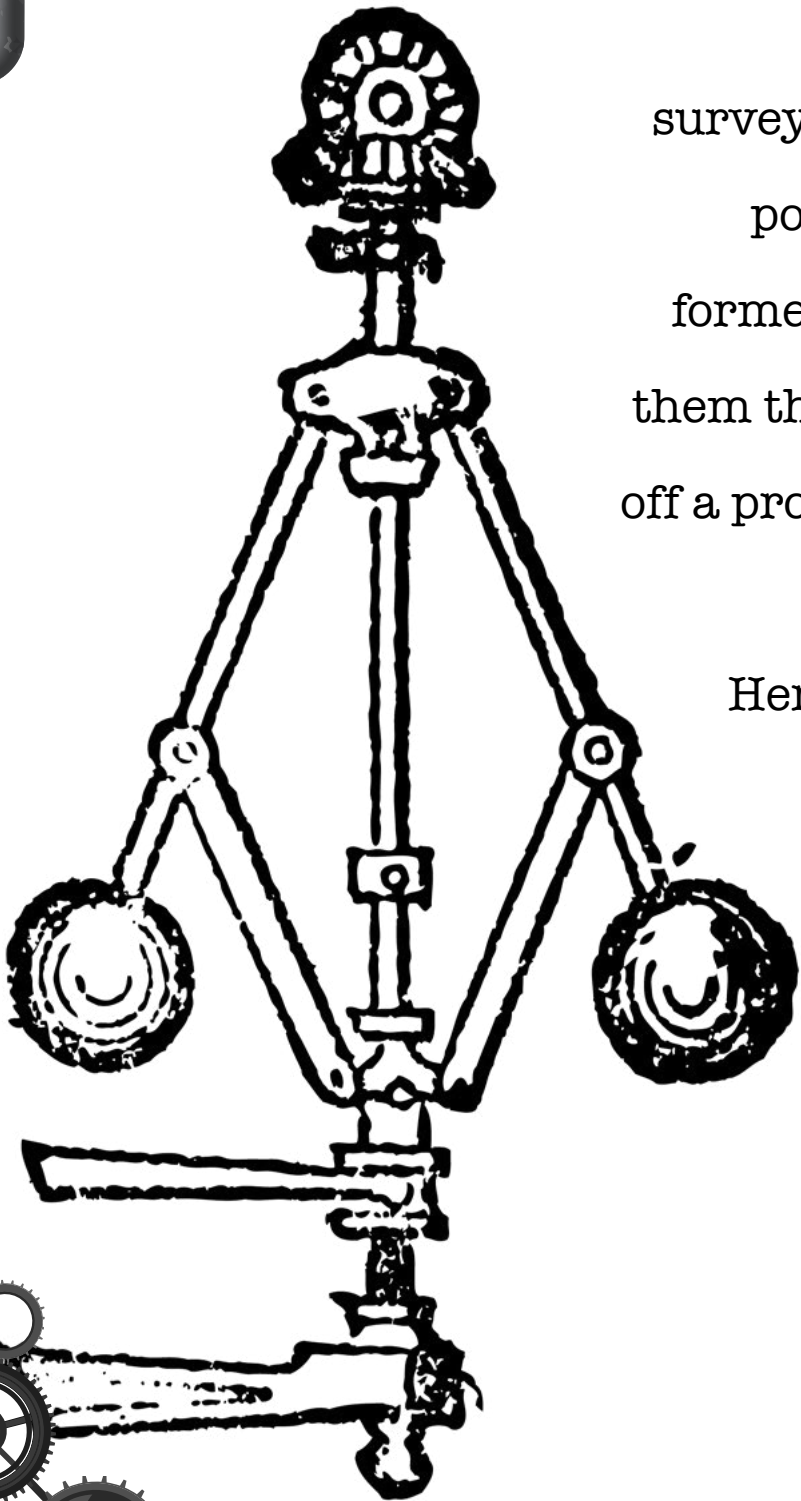
HOW TO
MANAGE
A SMALL
LAW FIRM

HAPPY LAWYERS MAKE MORE MONEY

.....

CREATE A SURVEY FOR YOUR REFERRAL SOURCES TO TELL YOU WHAT THEY WANT

.....



survey all of your referral sources, potential referral sources, and former referral sources to remind them that you're still alive and kick off a profitable referral relationship.

Here is a Sample script you can use to conduct this survey:

Hi, (business owner name), how are you and your business doing?

Last time we spoke you mentioned _____
(something personal to demonstrate you give a shit, otherwise, why should they?).

(Segway into the referral relationship convo)

Great well listen, the reason why I am calling is some of our referral sources have asked us to create a streamlined VIP experience for people they want to refer to our firm. We want to make sure that we make you look good when you refer people to our firm, that means we want to make it easy for you, we want to make it easy for the people you refer to us—we want to make sure they know they're getting special treatment because they were referred by you.

And we want to make sure we say not only really good things about you and your business, but we also want to make sure that we're saying the right really good things about you and your business.

So, I'm calling to say first of all when you refer one of your valued clients to us, you can be sure we're not only going to provide them our always excellent service and get them the best results possible, we're also going to go out of our way to make you look good. We want to be an ambassador for you. So I am calling to ask what kinds of good things can we say about you and your business to reinforce to your customers how great you and your business are? By the way don't be shy, if you are open to it, I have some suggestions for some things we'd like your permission to say about you and your business to people you refer to us. And of course, we'll say these things to people when we are in a position to make a referral to you too.

(continued on next page)

For example: (things we'd like to say about you and your business)

(Note, quiz them about credentials, success stories, patented processes, etc., depending on the nature of the professional/business you're speaking to. For example, you're not going to say the same things about a restaurant as you would about a dentist.)

- _____
- _____
- _____
- _____

Also, when you make a referral to our firm, we want to make sure that your customers/patients/clients feel special and so we want you to know that we'll be offering them special perks like:

- _____
- _____
- _____
- _____

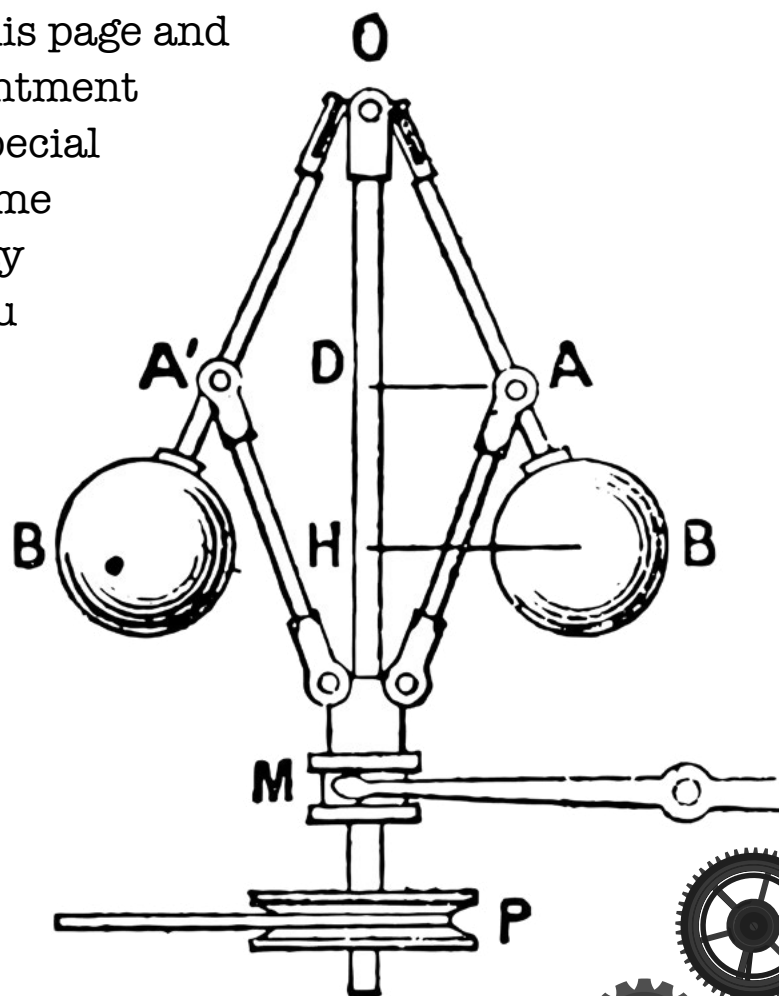
(Examples your firm can offer: extended hours, flexible scheduling, dedicated hotline and some other exclusive benefits that they'll only get if they're referred to our firm by one of our VIP referral partners.)

And we want to make sure they know they're getting these benefits out of respect for you. But like I said, we are in the process of creating this whole system right now, and so I am calling to ask if I can ask you some questions about some of the things we have in mind, to make sure we don't waste our time creating benefits that you don't value.

And of course, we want to hear about ideas that you would value so that we can try to build those into the system for you.

For example, we're creating a system so that when you refer a client to us, they'll have a special appointment page just for people you refer to us, and no one else. And on this referral page, we'll say good things about you and how much we value and respect you and appreciate you, if you would allow us to, we'd like to even put a photograph of you on this page and when someone schedules an appointment with us through this page with a special identifier, our office will know it came from you, they'll be reminded to say very good things about you and you can be sure we'll never refer your customer/client/patient to anyone else but you.

(continued on next page)

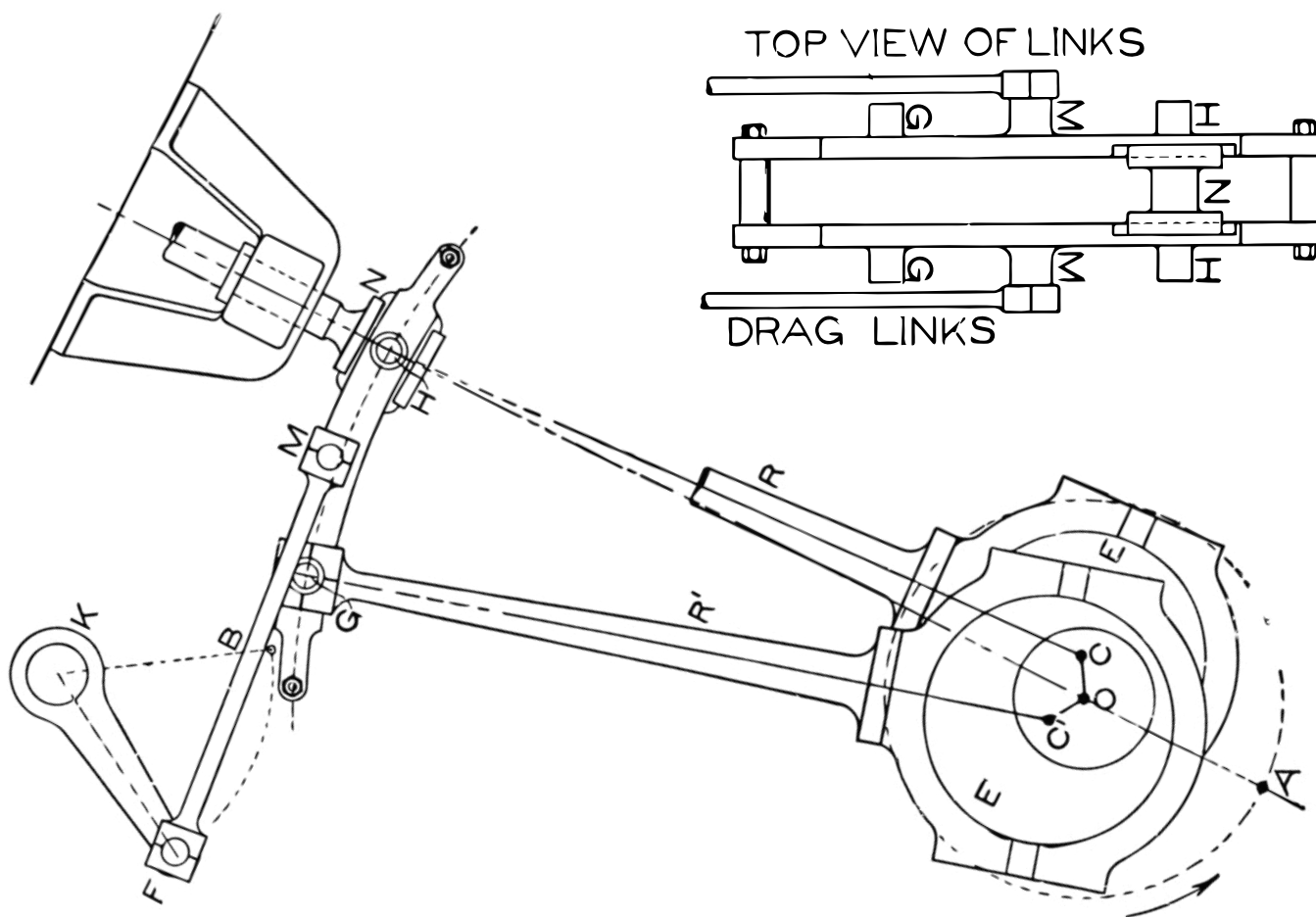


So let me ask you some of the questions I have in mind to make this a smooth process for you and your customers:

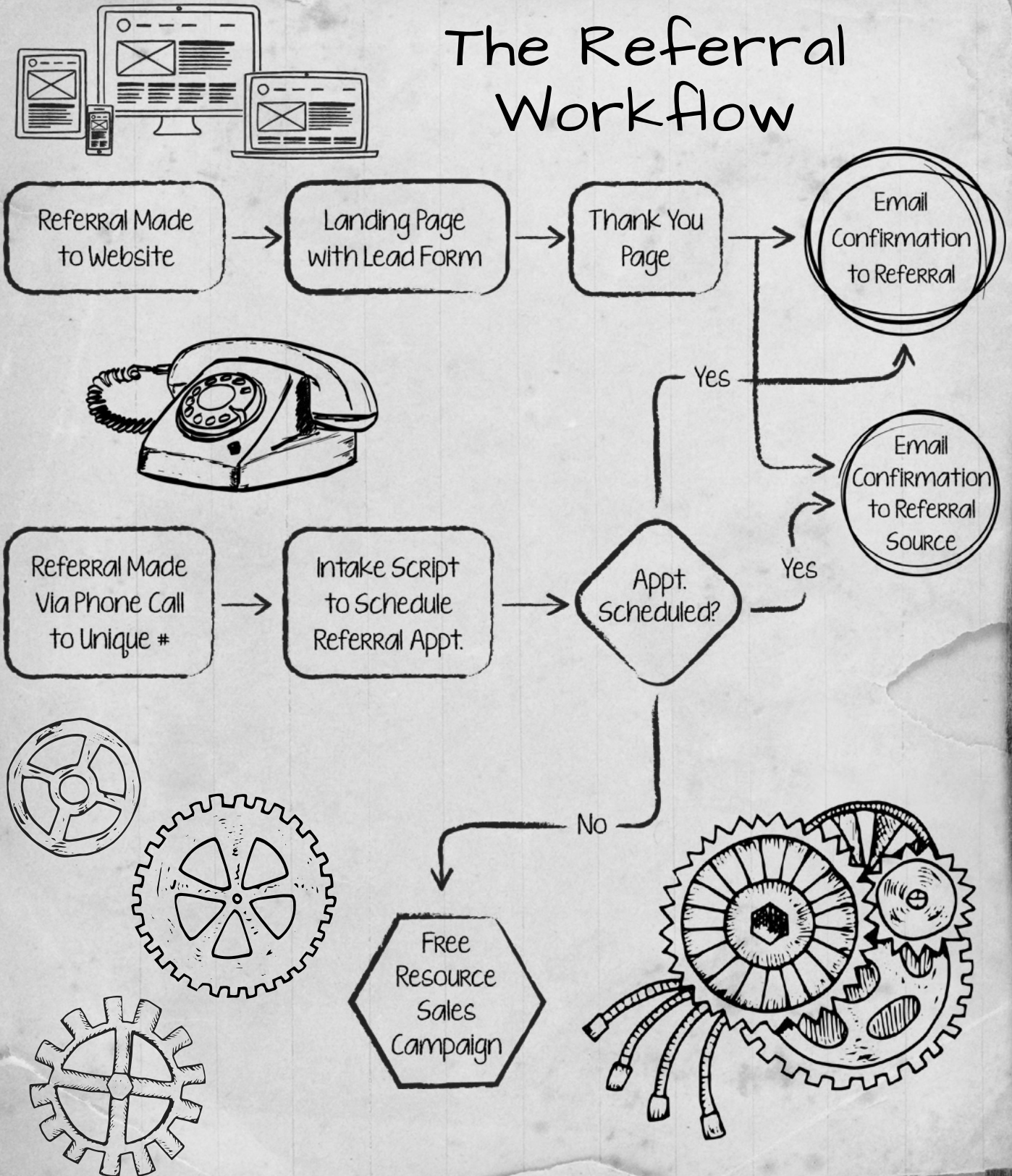
- When you refer someone to us that may schedule an appointment will you prefer that we let you know that they scheduled an appointment with us, or would you rather not be bothered?
 - If you want to be notified, where should we send that notification to?
- Would you like to have a photo or bio on the page to remind and reinforce your clients why it's great to do business with you?
 - If so, send that to (email address)
- Would you like to refer your clients to call our firm, email us, or visit a website?
 - If they prefer to call: Setup a unique CallRail number to identify the lead coming from that referral partner
 - If they prefer a landing page: setup a unique landing page and form that captures the lead and identifies them as coming from this referral source.
- **Tip:** *Rather than asking leads “Who referred you?” on a web form try to ask them for a unique identifier leading to that referral source like an email address. Asking for a name to the referral source can lead to confusion. For example: Robert, Bobby, and Bob may all be the same referrer, but your staff will not know this. An email address may be best but, in some instances, impractical. The business name could be a better solution.*

- **BONUS:** prepare ALL THREE options for your referral sources and make it easy for them to give their clients the option to call, email, or visit online
- Would you be interested in free resources to give your clients before officially making a referral such as: *(list some free e-books or video series you think their clients would appreciate)*

- _____
- _____
- _____



The Referral Workflow



ELEMENTS TO BUILD THIS BLUEPRINT

Referral Landing Page “Entrance”

- Landing page
- Appointment offer
- Field/Mechanism to track referrer
- Referrer highlight* If your referral source takes you up on this offer
 - Their picture
 - Name of company
 - Bio
- Mechanism to capture leads
- Thank you page ideally with a next step / “up-sell” offer
- Email confirmation to referral
- Email confirmation to referral source

Referral Phone Call “Entrance”

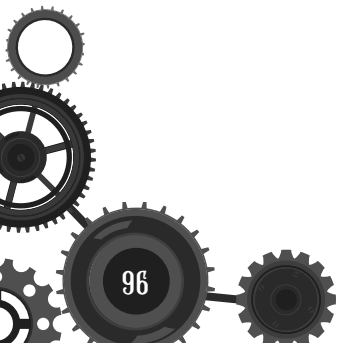
- CallRail tracking ability
- Tracker for unique phone number for referral sources
- Intake script to schedule appointment

Free Resource Campaign

- Create e-book, video series, free report, audio series, etc.

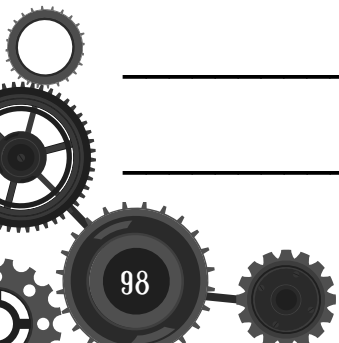
REFERRAL MARKETING CAMPAIGN IDEAS

1. A podcast to feature your referral sources
2. Newsletter to feature your referral sources
3. Power lunches where your referral sources are your guests
4. Joint workshops that you organize for clients and prospects and feature your referral sources
5. Client appreciation experiences where you feature your referral sources as the stars of the experience
6. Marketing campaign to your clients/former clients to promote specials and offers from your referral sources.
7. Organize a few charity events per year, invite all your referral sources and you can all promote whatever good cause you're engaging with, and hopefully invite prospects to join too.
8. GAS calls to your referral sources





A series of horizontal lines for writing notes, starting below the gauge and extending down the page.



BEST OF SESSION VI



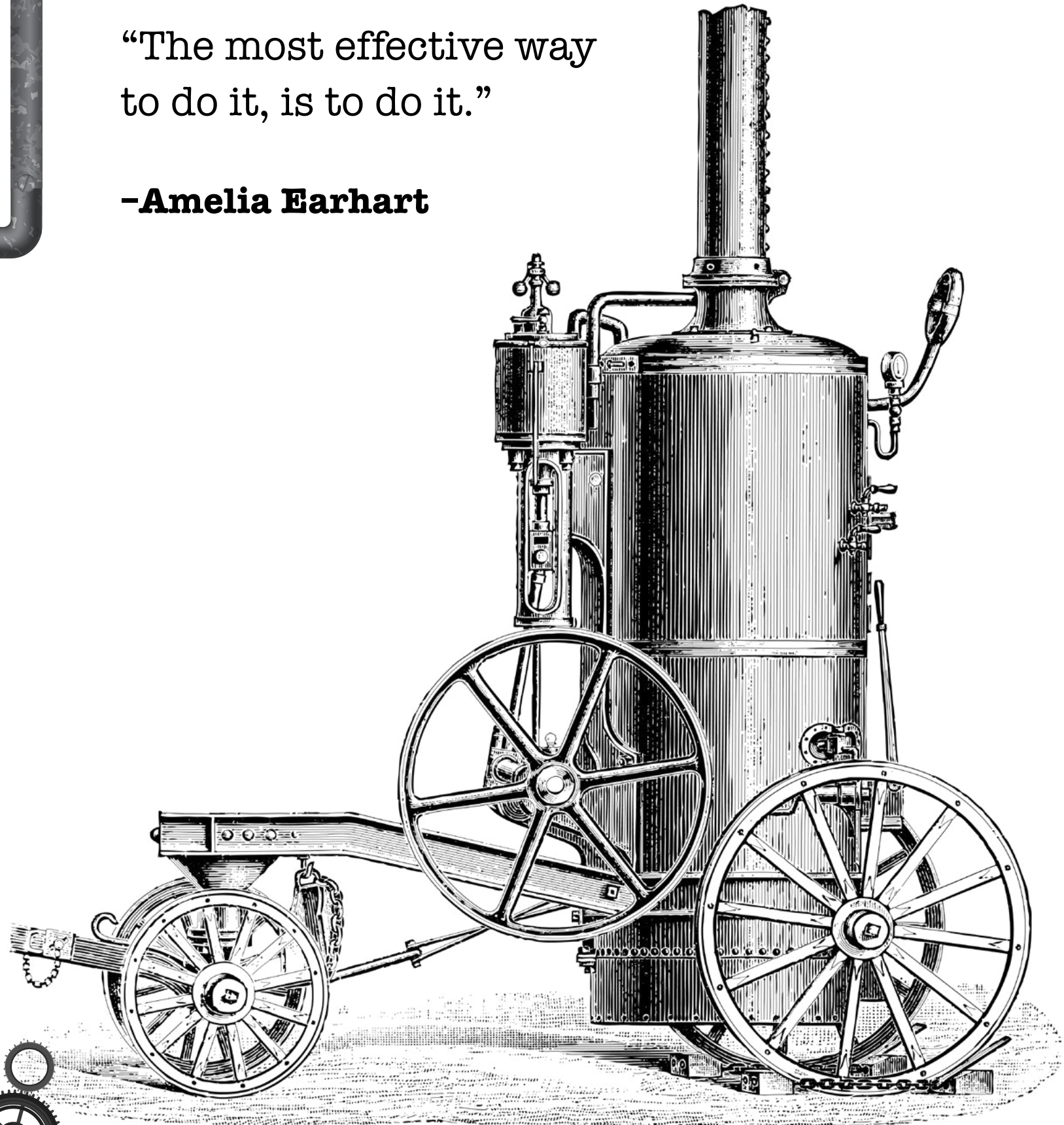
IDEAS TO IMPLEMENT	BEST FIRST ACTION(S)
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Which idea on this page, if implemented, would have the biggest positive impact on your business and / or life?

#

“The most effective way
to do it, is to do it.”

-Amelia Earhart



SUNDAY

11:00 AM - 12:30 PM

SESSION VII

H	O	W	●	T	O	●	●
M	A	N	A	G	E	●	●
A	●	S	M	A	L	L	●
L	A	W	●	F	I	R	M

HAPPY LAWYERS MAKE MORE MONEY

THE 90-DAY RESULTS ACCELERATION

My Best R.O.I. 90-Day: _____ Project: _____

STEP 1

How Is Accomplishing
This Going To Make
Your Life Better?
Personally, Professionally
or Financially

A
B
C

STEP 3

What Are The First 3 Things That MUST Get Done In Order To Accomplish Your Objective?

STEP 4

What **TOOLS**, **RESOURCES** or other **ASSISTANCE** do you need to get these done?

TOOLS	
RESOURCES (PEOPLE, MONEY, TIME)	
OTHER	

STEP 2

How are you going to feel about yourself if you let something, someone, some fear or _____ stop you from getting this done?
 (enter excuse here)

1
2
3

STEP 5

In what way(s) do you have to change your **ENVIRONMENT** in order to get this done?

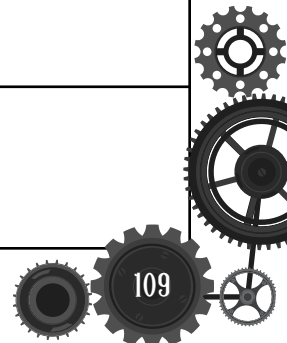
PEOPLE	
PLACE	
THINGS	
READ/WATCH/ LISTEN	
OTHER	

THE 90-DAY RESULTS ACCELERATION

NAME: _____ **ADVISOR:** _____

STEP 6: What **ACTIONS** are you going to commit to take in order to accomplish your outcomes?

ACTION STEPS List the actions, tasks or steps you'll need to accomplish your outcome	TIME How much time will you need?	MONEY How much money will you need?	WHO Who can help you get this done?	WHEN By what date will you get this done?
1				
2				
3				



THE 90-DAY RESULTS ACCELERATOR™

NAME: _____ ADVISOR: _____

MY 90-DAY CALENDAR

— Identify And Commit To 2 Types Of Activities —

Free Time

Away From The Office & Work

My BEST Free Time Activities

Strategic Growth Time

Away From The Office

My BEST Strategic Growth Time Activities

NOVEMBER / 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

DECEMBER / 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

JANUARY / 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

BEST OF SESSION VII

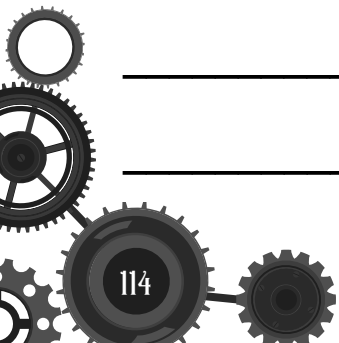
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Which idea on this page, if implemented, would have the biggest positive impact on your business and / or life?

#



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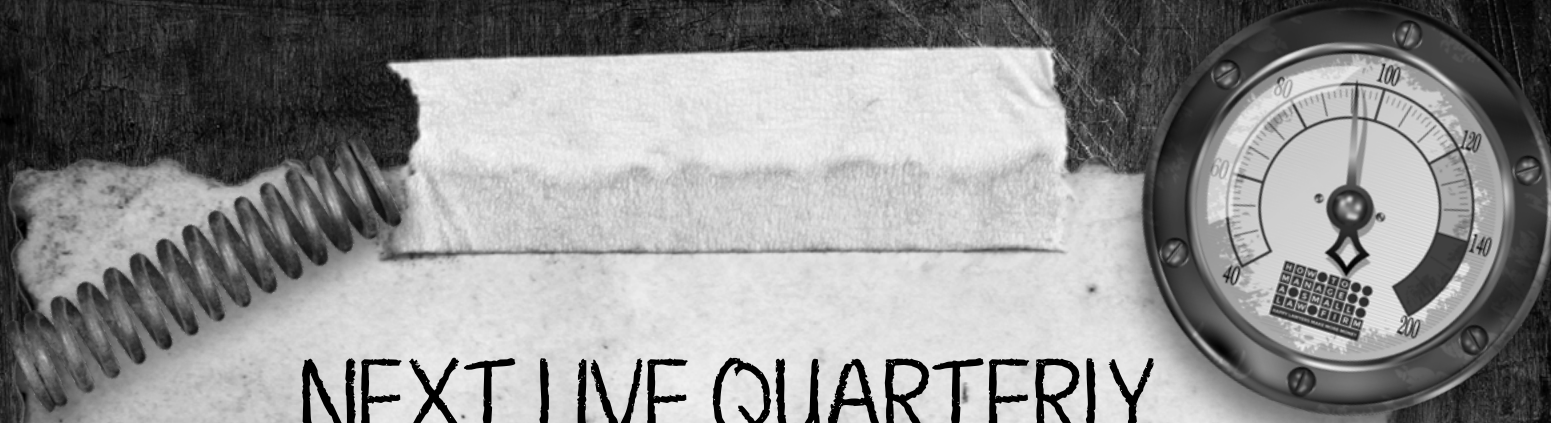


BEST OF THE BEST

IDEAS TO IMPLEMENT	BEST FIRST ACTION(S)
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Which idea on this page, if implemented, would have the biggest positive impact on your business and / or life?

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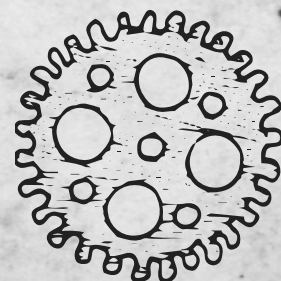


NEXT LIVE QUARTERLY MEETING DATES

January 21 - 23, 2022
New Orleans, LA

To RSVP for the next LQM,
please visit the Events page on
the Membership site.

HowToManageASmallLawFirm.com/Members



HOW TO
MANAGE
A SMALL
LAW FIRM
HAPPY LAWYERS MAKE MORE MONEY

WOULDN'T IT BE GREAT IF...

there was some award you could win that you didn't have to pay for, that allowed you to display the award seal on your marketing materials, and positioned you as one of the fastest-growing law firms in the country?

OH WAIT, THERE IS!

TAKE ACTION TODAY AND APPLY TO BE ON THE 2021 LAW FIRM 500 LIST!

- ❖ It takes 2 minutes.
- ❖ It's based on rate of growth, not revenue.
- ❖ It costs nothing.
- ❖ It would be foolish to pass this up.

THE APPLICATION DEADLINE FOR MEMBERS OF HOW TO MANAGE A SMALL LAW FIRM HAS BEEN EXTENDED TO TUESDAY, OCTOBER 26TH AT 5PM ET

We Would Like To See You Become
A Nationally Recognized Law Firm!

APPLY TODAY!

P.S.: SAVE THE DATE
for our 6th Annual Law Firm
500 Awards Celebration
happening virtually on
DECEMBER 4TH, 2021!



LawFirm500.com/members-only

