



Freedom Practice Podcast

Episode 9 – Client Intake Process

Hi, this is Craig Hersch, and this is the Freedom Practice Podcast. In the last episode I talked about weeding out D and F clients. How to have the confidence to do that, how you can approach your practice from an abundance mindset and not a scarcity one.

When you approach your practice from a scarcity mindset, you're worried that you're going to turn business away, and that you're going to starve. That you're not going to be able to pay your make your payroll or for whatever reason. But if you haven't listened to that prior podcast, please do listen to the podcast about weeding out D and F clients.

Let's now talk about a client intake process, because without a client intake process, it's nearly impossible to weed out those D and F clients. Let me describe what we do here in my firm. For a new estate planning client, they have to do a few things. We have a video that we want them to watch about what to expect in that first meeting and the things we want them to be prepared to discuss. The second thing we want is a copy of their documents. If they have existing wills, if they have existing trusts, we want to copy them so we can look at them. We want them to fill out a detailed client organizer so that we know what they own, how they own, who owns it. We also have a series of questions. Have you ever filed a 709? We want copies of the 709. Do you have any medical conditions are there mental impairments, and so forth and so on.

So, we have a very extensive client organizer that we asked them to complete. We also asked for a for a prepayment of our initial consultation fee, which is several hundred dollars. Now, you might be worried 'geez, won't that run off clients?' Yeah, it will. It will run off the D and F clients. The clients who are very interested in in discussing with you the clients that are willing to pay a premium fee for a premium service.

Aren't you setting those expectations here? You're setting those expectations for a premium fee for a premium service in the way that you conduct yourselves from the initial client contact. Now our client intake package has some really interesting things. It has a wonderfully created brochure that does provide them a lot of information about their first meeting, it also introduces them to the team. We have a team insert. We oftentimes give them a book that I've written *Florida Estate Planning*, and some other things. We have all sorts of things in that initial client package.

Remember, when you're trying to sell an intangible service, and particularly where you're trying to sell a premium intangible service, it's good to have something that they can hold that they can touch, a tangible product. We also have an email that has maybe a podcast or the video we want them to watch or the podcast we want them to listen to and those sorts of things. It's pretty extensive. We're setting the stage. Now we come at it from an abundance mindset, in other words, we're not afraid that if we run somebody off that there's not going to be somebody else, because there's always going to be somebody else there. Our firm has never had a problem with the number of clients that are coming in the door, we mostly have problems getting the work done, which is a good thing. I think when you have that mindset, that's what's going to happen. But a client intake process where you don't deviate from it, because I've always been sorry, when I deviate, "ah don't worry about it," and let them get away with



not doing this, not sending in the organizer, let them get away with not paying the fee for the initial consultation, I've always been sorry, always been sorry.

Even during that (initial) meeting, if you're getting a bad feeling about the client, there's no reason to take that client on. You're interviewing them as much as they are interviewing you. If you get a funny feeling about a client, like if they've been to three or four other attorneys, what makes you think that you are going to solve all their problems and they'll be happy with you? If they talk badly about the last three or four attorneys they've had, what makes you believe that they're not going to be talking badly about you in a few months? If you feel bad about the client, even if your gut just tells you there's something wrong, don't take on the engagement.

By the way, with the client intake process, hopefully you've ferret those out even before you're sitting down with them or zooming with them or somehow meeting with them. Now there'll be different client intake processes for different types of services that you provide. Our probate and trust administration process is different and has a different intake process, then does our estate planning process. Another process that I described is when we have a correction a new client who wants to modify an existing irrevocable trust, you know, which of course is a little bit more difficult. We have intake process for all these different things, and we adhere to them.

So, today's episode, hopefully, your takeaway, your big takeaway from today is to develop these client intake processes. By the way for more information on this the freedom practice of which I am, the founder provides this kind of information and coaches you and helps you get to the point where you have great client intake processes as well. But of course, you can do this on your own, and if you're really excited about this, I hope you do. That's the topic for today and I hope that you had some great takeaways that you can implement into your practice soon. Thank you very much for spending your time with me. If you found today's information valuable, please do subscribe to the Freedom Practice Podcast, and you can also find us on the web at 4freedompractice.com. That's the number four followed by freedom practice, so it's 4freedompractice.com. Until next time, this is Craig Hersch I look forward to speaking to you again soon.