

“The Forever Plan: How (and Why) To Nurture Your Clients and Win Their Social Circle For Many Years to Come”

Here’s the premise and it’s simple. People come to you and you help them. It could end there. Or, it could never end. These people will have future legal needs. And so does everybody they know.

Why would you not honor that person, bond with them, maintain the bond and deepen it at every turn so that a year from now and five years from now, they think of you *first* when someone is injured and they think of you with feelings attached that compel them to take action?

Because of the connection you sustain, they think of you for themselves and they think of you for their family and friends. It would be a little bit insane not to extend your relationship into forever if you could.

The question is “What would it take and would you be willing to do it?”

We’re not huggers, so forget it! Or is there still a way for non-huggers?

First the famous story of the three baby girl monkeys. All three were raised in a laboratory. The scientists wanted to see how they took to motherhood after experiencing different levels of nurture during their youth.

First baby girl monkey got a mom, fresh breast milk, lots of grooming and lots of hugs.

Second baby girl monkey got a warm fuzzy doll with a milk dispenser attached.

Third baby girl monkey got no fuzz, no warmth, but a milk dispenser surrounded by cold hard steel.

First baby girl monkey grew up, was impregnated, gave birth and was a perfect monkey momma.

Second baby girl monkey grew up, was impregnated, gave birth, and had a bit of difficulty adjusting to motherhood but was not a complete failure at it.

Third baby girl monkey was impregnated, gave birth and could in no way relate to the little monkey that just came out of her body. She hit it, screeched at it, ran from it and ran at it. Total disconnect.

What's the Implication for YOU?

If you can't be the first monkey mama, can you at least be the second monkey mama? Can you at least simulate nurture? I think you need to recognize that you already are nurturing. You put in serious care in other parts of the client experience. It's simply a matter of being clear about what you're committed to—and extending the care into the future in effective and appropriate ways.

You May Be a Better Monkey Mama Than You Realize

Consider the Nurture Spectrum with reception in mind—someone answering the phone for your firm. That's the moment your relationship is born with a new person reaching out for help in a time of pain and confusion. Ideally, this could be the seed of a long term, fulfilling relationship for both parties.

Sometimes the act of greeting a stranger thousands of times has a numbing effect on a person—especially someone poorly selected with no training and little oversight.

They can become cold and robotic, and it's not a great start being greeted that way. Your lawyers and case managers would have to overcome a warmth deficit right off the bat and that ain't right.

Your perfect Relationship Initiator would answer the phone with a smile and an “I love you” in his or her voice—every time. But who could ever be that good? I can tell you from exposure to a lot of law firms that some people really could be that good. If they were well selected, trained and encouraged.

Intake staff—how do you imagine them? It varies from firm to firm. Are they sales reps? Are they triage experts? Do they connect? Do they also persuade? Which are they better at? Do they set up the new client for a phone meeting with a lawyer? Do they catch the case for you and then pass it on down the line? How strategic is your thinking and persuasion at this juncture beyond “catch the case?”

Is it possible to catch the case in a particular way? Which way? How about the way that tilts towards forever and away from the submerged assumption that this is a mere transaction?

The Referral Contract™

The Referral Contract™ is an innovative compliance technique that programs the mind of your client to commit to protecting their social circle going forward by recommending you when they need a lawyer. Right from the start it frames referrals as a contribution to others. And gives them

an opportunity to volunteer to be an amazing contributor to the well being of their loved ones. Their ready acceptance of 'The Contract' gives you an opportunity to evoke in advance the emotional rewards they will receive when they extend themselves to help others.

Are Case Managers Part of The Forever Plan?

Now take case managers. Is it important that they connect, register empathy, exhibit great listening skills? I think so. Obviously they have to be skilled and focused and handle details and meet targets. So there's a *profile* to consider for case managers, including connecting skills. If someone had perfect organizational skills but was lousy on the phone and pissed everybody off, would you replace them?

The point of these illustrations is to contemplate key moments in client's 'Journey to Justice'. Now, tell the truth: doesn't your commitment end at disbursement? And after that it's mostly a few Hail Mary passes like holiday cards?

You're already committed to nurturing the relationship, so the refusal to do it full force where it's needed most is a disconnect. Proof of insanity to put it nicely.

A simple question is: how to deepen and extend the bond with the client so they don't go somewhere else eighteen months from now?

Now deepen it. How to bond with the client so that their subconscious mind is eternally sweeping for people to protect and help when injured—and then when one is located, urging them to call you. Doing it so that it lasts at least 18 months. This would allow you to avert the tragedy that happens to a lot to good law firms where the client suffers a major injury and goes elsewhere a year or two after their smaller case is resolved.

Now let's go whole hog. How to bond with clients so that seven years from now, when someone is injured in their social circle—as surely as day follows night—they will make sure that person knows to call YOU.

What would that be worth? Obviously that is sane and it's something you've been hoping for but are not committed to enacting.

Why did you not follow through? Let me take a stab at answering. Because you did not know how and were put off by the complexity. Too many unknowns and you know how to pull out the money hose, so...

I have some good news and some bad news. What do you want to hear first? Expense wise, don't make me laugh. If you pay thousands per case caught through clicks or television, you are blowing your brains out compared to the cost of nurturing clients who will speak up years from now when Aunt Charline is in a major truck collision.

Back to insanity for a wee moment.

As I said, you're already committed to nurturing your clients. And you want all the referrals you can get because they are cheap, delicious and fat free. That's the good news. And some things can be automated and client nurture happens not to be one of them. That's the bad news if you look at it that way but it's in no way necessary to look at it that way. In any case, it's an interaction by-interaction Journey to Justice that ends or never ends—your call.

And when it ends, it's over and you don't get all the cases that person might bump into in the next ten years.

Referrals is the ultimate low hanging fruit but you have to do the planting and feeding and watering and pruning and conditioning of the soil or you don't get the fruit.

How Important are *Connectors*?

Would you bend over to pick up a \$100 dollar bill? Then of course you are strategic in selecting and training great *Connectors* because you understand 'The Forever Plan', right?

You've done that of course, yes? Phew. You scared me for a second. Not doing that you'd have to be insane. A lot of law firms try to throw in a bit of "nice" here and there and hope it adds up to a sustained connection. And they don't have any particular disbursement strategy so they essentially throw people away when they catch their split from the settlement. "*Okay, there's your money (and here's our money). See ya!*"

Or maybe these firms send the birthday card. The "*Please please send me a case cuz look I'm being nice*" message.

A Few Key Moments Along the Path

Along the 'Journey to Justice' there are critical junctures. One of them, of course is *intake*, the beginning of your love affair with this wonderful person you get to serve. What does this new person feel, perceive, understand, construe? Does your intake work? There are a few moving parts to this first stage of the relationship. Does the way your team executes it set clients up to become a forever referrer of cases?

There are multiple interactions with case managers along the Journey to Justice timeline. How are they managed and measured?

Another key moment, of course, is when it's time to recommend a *settlement* with the insurer. Your manner of doing that, and the quality of the rapport in that moment are determinative of

client satisfaction, and that can have an effect on their willingness and likeliness to refer. Why? Because connection is deepened or sustained or damaged at key moments.

Disbursal: The Super Bowl of Your Relationship

Ah, but there's a very big moment which virtually everyone ignores or gives short shrift to. Another way to consider it is as the Grand Opening of the Forever Plan. You've proven you can come through for them, and so it could be the first day of the rest of your lives being connected. But look at the messages embedded in how you do it now. Do you mail the check? Is it a direct deposit? Is there any fanfare? Any species of Client Victory Party?

The disbursal could be the Super Bowl of your relationship. Big feelings are available. The way it's done can establish what it all meant and whether its all over or just beginning. It's the best opportunity you will ever have to bond deeply and create a multi case referrer. To not take it seriously would be... you know, insane.

Everything could end right there. Or it could be just the beginning. What would be your preference? Forever, of course. Do you currently have some kind of 'Forever Plan' in place?

Why have you not recognized that the disbursal is the key moment in the client relationship, and why have you not identified Connection Superstars to conduct beautifully structured disbursals?

"But we're busy and we like to mechanize everything. It's messy and human and emotional, and we're not huggers, so..."

Yeah yeah yeah. It's not that hard, and you are in the hugging business no matter how hard you deny it. Besides, we are past that now. You don't hire machines for reception because you know connection is important and tone is important.

Now it's only a matter of recognizing how very important connection is at the most important moment. How do you rate your handling of Disbursal? Does it deepen and extend the relationship?

It would be insane to hope a person whose case is ending this year in April will send their mother, their brother and their Aunt Joan to you two years from now if you let them walk away without deepening and extending. And creating the meaning for their Journey that embeds in their subconscious minds even if you had not established a Referral Contract™ at the beginning.

Should We Bother to Nurture or Should we Just Spend More and More Per Case?

You can always buy more ads and clicks. If it's a pain in the you know what to embrace aspects of client nurture that cannot be mechanized—and that require real stamps and personal notes and

ink signatures and real connections—how much of a PITA is it to have to reach for the money hose again and again when you require more intakes to reach your objectives?

Here's a serious question and challenge: Would you prefer to get ten referrals from a client you do a great job for, or would you rather pay for the next ten clients because you got no referrals?

You: *"Golly, give me a second to think. Do I want ten referrals or none? Hmm....seems obvious, there must be a catch. I'll take none!"*

That's not you, right? Please tell me that's not you.

What's the real bottom line operational difference between one approach and the other? Doesn't it have to do with a relationship that stops or continues? That deepens and becomes more meaningful and significant, or was a decent enough transaction but it's in the past and forgotten.

Goodwill is great. Connection is better.

Dry tinder is hopeful when you are sitting, shivering, striking that worn out flint repeatedly on a chilly, misty morning. A roaring fire is better. Do you agree? Triggers are like sparks to dry tinder. The Forever Plan should be obvious when you've been wise enough to build up goodwill, but don't forget the triggers. Otherwise, you could be sitting shivering for a long time.

You Know What Hurts the Worst? And I mean REALLY Hurts?

The most painful cost of not understanding and implementing your version of 'The Forever Plan' is when—a year or two after you do a great job for a client—they are injured again. Or their loved one is injured, seriously, and they call another law firm.

Has it happened to you? Tell the truth, isn't it a punch in the gut? Many lawyers have confessed to this experience in tones of bewilderment and hurt.

And how does it happen? I'll tell you how right here and right now. They liked you, time has passed, now they are injured again and say: "I guess we need a lawyer." They may think of you and they may also say let's see what else is out there. They poke around and see something they like on Google or somewhere and click on it. One of your competitors has done their homework and it's like a greased chute leading to an inquiry. Maybe it starts with an innocuous chat on a website.

Soon they are in the intake of another firm signing the retainer even though you did a great job and they like you. I have heard this sad story many times.

And what do you think when the catastrophic injury case happens a year or two later and your past soft tissue client calls someone else?

“We worked our bag off for these people and this is how they reward us!!!”

Outrage, hurt, shock, pain, bewilderment, regret, confusion.

The Forever Plan is insurance against all such avoidable agonies. So let’s put a little salve on that wound, shall we?

It’s not that they didn’t like you. It’s not even that they don’t like you now. It’s that the connection is fuzzy and unspecific. The meaning of the relationship was never established. Their Journey to Justice was not embedded in a narrative that explicitly associated you with their journey in a way that makes you the hero who saved them and vanquished the villain who hurt them. You had an opportunity to program their subconscious mind and you let it go past.

People think whatever pops into their heads and who knows what pops into their heads now, relating to you? It could be literally anything, including “I remember a fly buzzing around the reception area and there was a girl wearing a red ribbon”.

Maya Angelou Again and Again*

Feeling and meaning are not nothing. Maybe they are everything. Feeling and meaning are of the subconscious mind and that’s pretty well the whole mind. Referrals are going to happen because of associations in the subconscious mind. Or, referrals are not going to happen due to a lack of associations (triggers) in the subconscious mind. Maya Angelou* famously said: “I’ve learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

But what about what Winston Churchill said: “Men occasionally stumble over the truth, but most of them pick themselves up and hurry off as if nothing had happened.”

Maya just whispered a big clue. And Winston warned you about ignoring it. The bottom line question about the service you deliver for your clients is: was it just a transaction or was it a transformation?

People will never forget how you made them feel, and they will easily forget what did not move them—like a mere transaction.

That’s why ‘The Forever Plan’ is your insurance policy against shocking losses like the appreciative small injury client who suffers a major injury and goes somewhere else.

What about the nice people who call in and get turned down?

Are they worthy of your ‘Forever Plan’? A lot of law firms spend a lot of money to make the

phone ring and they “kiss a lot of frogs looking for princes”. Turning down 80% of cases is common. These turned down people are of no value because they brought a useless case.

Get the hell out of here, you idiots! No, of course you don’t say that and you don’t think that. And but yet, are you sure you should throw them away so cavalierly? Let’s think about it for a wee moment.

Do they have mothers and sisters and friends and aunts and coworkers? Did you do a great job for them so far?

Do a great job for the people we said “no” to? What the hell are you talking about? We rejected them. They probably hate us!

Not so fast.

If you greeted them kindly, listened to them intently, connected, and then gave them professional advice for no fee helping them to understand their rights and options in the troubling situation they found themselves in— you are in a position to create a lasting relationship.

Consider that it’s bad enough that your good client can get a settlement and go away and then a year or two later be involved in a catastrophic injury and not call you. What about the people you turn down? It cost real money to attract that nice person, didn’t it? They responded to your advertising and branding efforts. Maybe they like you. Are they somehow less likely to ever be involved in a serious injury going forward? Do you think they don’t know anybody just because they showed up with something that was not quite a case?

More about the professional job you did for them. You gave them solid legal advice. You know what a good case is and is not. You informed them and you were nice about it and you did not even charge a fee. That was decent of you, the way you helped this person who responded to your advertising and branding.

If you turn down 80% of inquiries you might consider shifting the focus of your intake department to Skilled and Loving Turndowns—along with the skilled acceptances you’ve already mastered. You do so much of it, why not master it? The turndowns are a bonding and getting to know you process, as you take one more good person off the market—beyond the reach of all your competitors’ ads.

Advanced Persuasion Technique Which Applies to Yellow Pages and to Referrals As Well

When I first met with personal injury lawyers to discuss the Yellow Pages I would ask, “What do you want your ad to do?”

Almost without exception, they’d say, “*Make the phone ring!*”

Then I'd say if I could suggest an objective that would take you further would you be open to hearing it, and they'd say sure, go ahead.

And I'd say the optimal Yellow Pages ad will generate a desire on the part of the right prospect to want to talk to you and only you. They will take down your number, close the book and call you and only you with the hope that you will accept their case.

And they liked that better. Especially the bit about "the hope that you will accept their case". They had been chasing so hard and for so long that they never thought that they could position themselves as the choosy Authority. The ad clearly positioned them as 'The Selector' and the prospect called ready to comply so as not to blow their chances.

What's the positioning strategy for your turn downs—the nice folks who call and you choose not to take their case? You don't need to feel guilty about it. And they don't have to hate you. In fact they can leave the transaction liking you more. They may yet be future clients, and why not? Given your sunk costs, why not Forever them as an insurance policy against predictable disaster?

If you deliver the free consultation well, in fact if you do it *beautifully*, the not quite client might aspire to *qualify* to be your client one day. The turn down was not a rejection of them, barring you from further contact and relevancy.

Hell no.

The recommendation you made for them was professional work product delivered without charge to a person of value who is part a social network, some number of whom will be injured in the coming years, needing help from someone just like you. Why not you? Why the hell not you? They know they did not qualify this time, but up ahead with another matter they may. And who knows? In seventeen months when their Aunt Charline is involved in a major truck wreck, you might have earned the call.

The Forever Plan is suitable for clients, ex clients and any potential client you deem worthy of bonding with and keeping close.

Now you have a new mission on top of your old mission. Your old mission was to pay repeatedly for expensive media to hammer away at the perceptions of people who had no reason to pay attention right now in the hope that on the day when they get hurt and you suddenly become relevant they think of you or find you and so you can serve them. Even though they've been ignoring you for years and you've been hammering away relentlessly. You have to keep spending and spending to be ready for the moment you become relevant. Because right now you are not.

The new mission is to remain relevant with people you are bonded to. You don't have to pay for more expensive ads going out in the dark, somehow connecting here and there and generally

missing in bulk. They are right here with you, sheltered from the world. You can speak directly to them within your growing bond.

4 Big Delusions Keeping You From Getting All the Referrals You Can Handle

Delusion One: You can automate referrals like every other marketing function.

Even though I want to automate everything, I know referrals cannot be automated. But, I still want to automate them. So I will ignore what I know and try to do it in a way that can't work very well. Yeah, that's the ticket.

Connection is a human to human thing. You have humans working for you along with the machines, software programs and algorithms. Make sure you have Connectors working disbursements for one example. Make sure you strategically nurture the relationship at each juncture in the Journey to Justice. It's a delusion to think you can connect in any meaningful way without people doing the connecting.

Delusion Two: Defaulting to 'Cheap and Easy' is just as good. Or, intending client nurture to generate referrals but not being willing to do what it takes to make it, and pretending it does not matter.

Instead of doing what it takes to make it, I'll do what's convenient and easy and cheap and not a bother and hope it works out. And I will cross it off my list and go on to the next thing even though this thing is as important as it is and cannot be taken care of this way.

I refer you to a Thanksgiving promo. Maybe you needed the PITA* principle to make it fly. But you sent an "email blast". Talk about diluting your potential impact by a thousand! It has no prospect of getting you where you want to go, but you do it anyway because it's cheap and easy.

PITA* stands for Pain In The Ass. Meaning execution is not done for maximum ease but for maximum impact and maximum differentiation, on the principle that nobody else would go to the bother. But you have to go to the bother to take advantage of the principle.

And, it does not have to be a pain in YOUR ass. You can hire someone who loves to do it. The principle here, like at reception is not maximum "efficiency" but maximum connection. **When you make the fuss that nobody else would go through to create the maximum impact, you get the connection nobody else had the vision to go for.**

One more time: When you make the fuss that nobody else would go through, you form the connection nobody else was able to form.

In this people business where it's possible to connect to a client so they remain connected for life, it's insane not to connect as deeply as you can. And to do that you need Connectors. Can I

get an amen? Or how about a duh?

It's insane to want referrals and not specifically prioritize Connectors and connecting.

There are cute tactical things you can do, but I'm talking about the Forever Plan. I'm talking about your team, working in your behalf, connecting deeply at critical junctures along the Journey to Justice and you having the marketing infrastructure and strategic insight to build on those connections.

Delusion Three: Email is all you need to follow up and stay connected.

Who thinks that? What were they thinking? Were they thinking at all?

Logic: Email blasts are the easiest and cheapest thing you can do. Therefore, they are the best. Because what is cheap and easy for us we like.

One of my all time favourite metaphors is of a drunk man who drops his gold watch on a dark cobblestone street and gets down on all fours to look for it. He crawls frantically in widening and narrowing circles and gets no closer.

Finally, he looks up at the corner a hundred yards away, and noting the bright streetlamp decides to continue looking over there, cuz at least he'll be able to see what he's looking for. Sending emails hoping for referrals is like looking for the watch under the light 100 yards from where you dropped it.

I thought you said you wanted referrals. *Yeah, but emails are so easy to send.*

Now watch this. Yes, email is cheap and yes it can do something for you some of the time. Does that mean it can do everything all the time? Are you willing to sacrifice impact—and connection—for convenience? Are you willing to sacrifice the results of your referral program to the ease and simplicity of doing it in a way that has no chance of being effective?

The Forever Plan means what it means. It means to form the deepest connection and sustain it for the long haul. Cheap and easy drip systems are grounded in a different intention.

Ultimately, email blasts—if that's all you do—are signs of delusion or lack of commitment.

I'm not saying you need exquisite intricacy and expensive implementation in all you do—though some of that would be really nice in a few places. I'm saying you need *finesse*. To have finesse you've got to have an accurate and calibrated understanding of where you are with those lovely people you went to the trouble of connecting with.

Email blasts are based in the clumsy hope of shaking the bag and seeing if anything pops out. They are not based on calibrated messaging within a connection.

Delusion Four: You can speak in any tone to any person at any time and it's all the same.

You can talk to new people as if you've known them forever and old friends like you just met. As long as you are saying important stuff, the message is sure to get across to the person you are talking to!

Let's take the good old "Dear Valued Client" approach.

Suppose you've had a client for years. They've come to you twice: once for a small soft tissue injury and then two years later for a major catastrophic injury. With the first case you won them a small but satisfactory settlement. On the catastrophic injury case you went to trial and won them a multimillion dollar settlement.

But that was five years ago. They haven't done anything for you in five years. So you may as well include them in the email blast list, right? Or maybe they get the bulk letter with the fake signature. And the salutation is:

Dear Valued Client.

The Our City Law Firm, LLP, has provided high quality legal services in Our City and the surrounding counties since 1944. We are a major personal injury firm serving individuals and workers throughout the tri state area. Our attorneys are licensed in all three states and admitted to all state and federal courts in each state.

We are committed to achieving the very best outcomes for our injured clients and their friends and loved ones. We welcome all inquiries from your social circle. We will undertake to serve your referrals with our very best efforts.

Very Sincerely Yours,

Greg Singleton, Esq., Founder and Partner

For that two-cases-but-nothing-in-five-years person, does this move them forward, move them sideways or leave them unmoved entirely? Isn't it kind of weird to ever talk to a person this way? We all know that legal documents must be precise. It's an admirable technical skill required to draft legal documents.

And but how do you speak to a friend? How do you speak to your mother? How do you speak to someone you know and love? Or someone sitting right beside you? What tone do you take with

someone you've gone through a lot with—together?

What is the appropriate tone for communicating within the Forever Plan?

I suggest you get someone who can write in forthright clear and warm tones of familiarity. Who can write to a person as if they are two feet away. A lot of times, people writing for a law firm talk to people two feet away as if they are miles away.

Think it Over

If 'The Forever Plan' makes sense for you, you have some decisions to make.

Who are your Connectors?

Will you change your criteria for new hires, prioritizing connecting skills?

Is your intake strategic? Does it include the Referral Contract™?

Do you welcome your new clients into your world and show them what it means to be part of it?

Do you let them know what is expected of them, what to expect and what to look for?

Will you institute regular training for all your teams to crank up rapport and connecting skills?
(Including how to recognize and rate connection and rapport)

Have you analyzed all your points of contact on the Journey to Justice, taking into account congruence, consistency, tone, verbiage, look and feel? Does each encounter work and deepen connection? Do they work together in an arc or do they pull in different directions?

Do you host client parties well designed for your firm and local culture with a suite of communications to deliver messaging to the collective mind of all your clients and friends?

Is there a Client Victory Celebration? A disbursal that deepens and extends the relationship?

Do you follow up in ways that would cause a person to feel connected?

Do you have ways to spark engagement and reignite dormant connections?

Do you enrol into your Forever Plan prospects whose case you do not take on?

Are you looking for insight and support in building your Forever Plan?

If yes, contact me: 613-803-8395 moistlotus@gmail.com