

Firm Operations Manual



Victory Walk
Coaching

Firm Operations Manual

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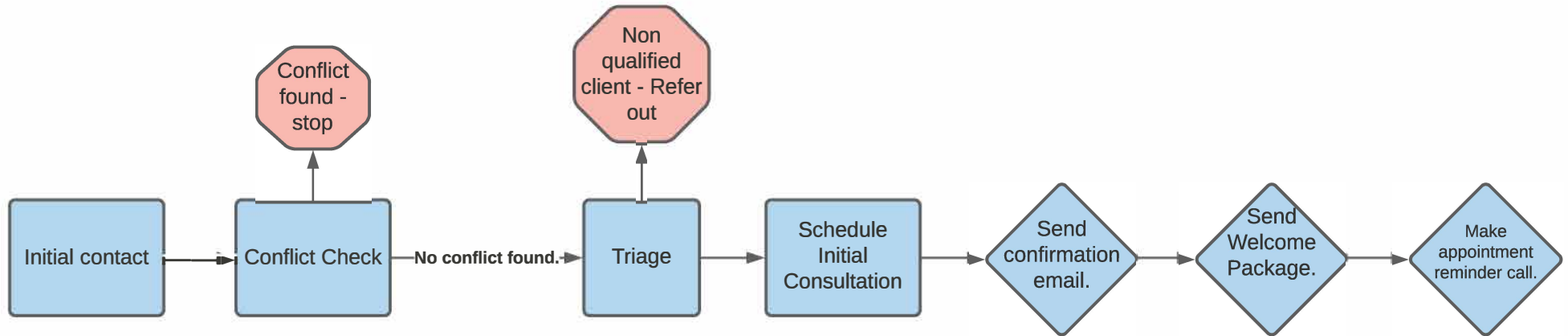
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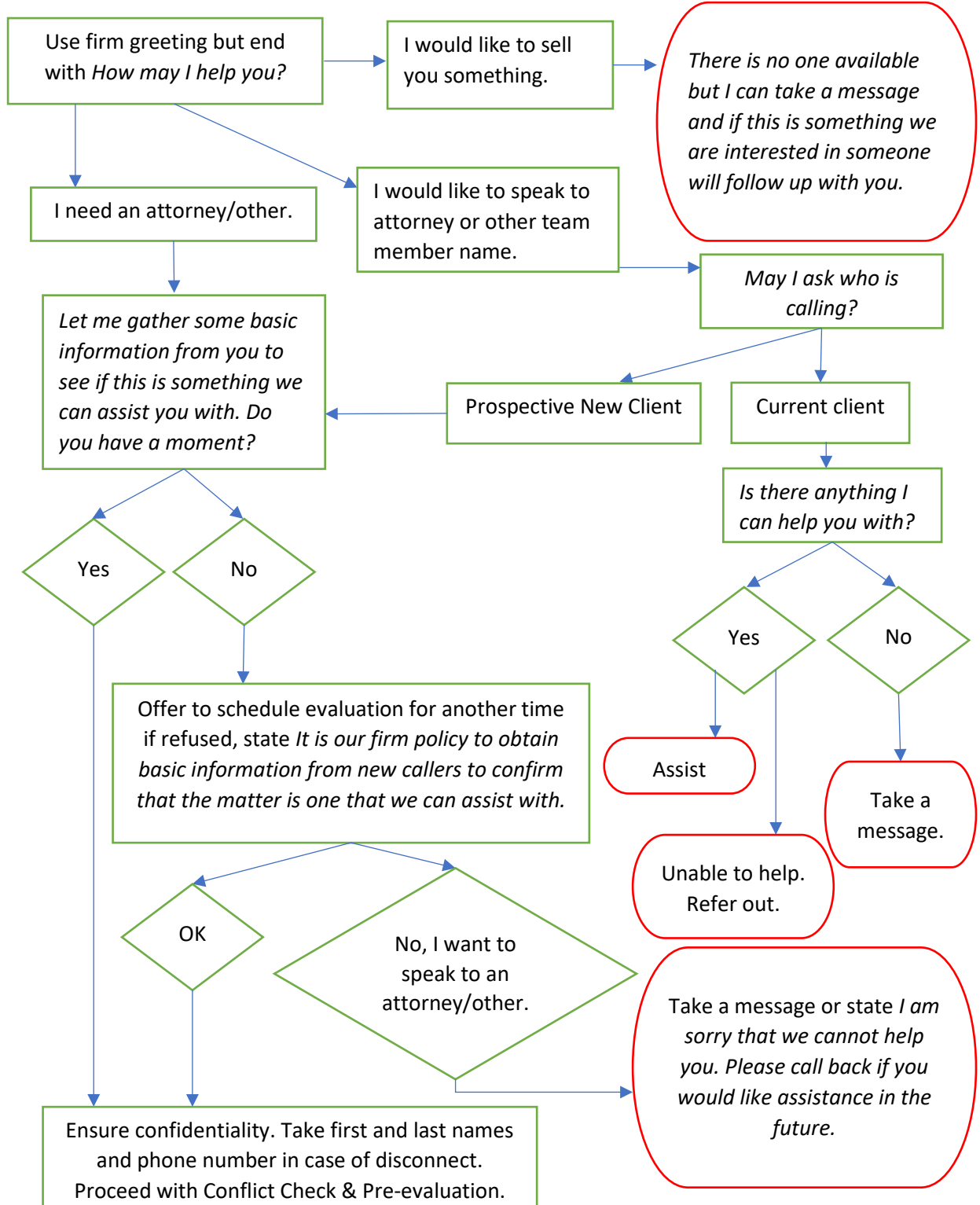


Pre-engagement Pathway Overview





Answering the Phone Script





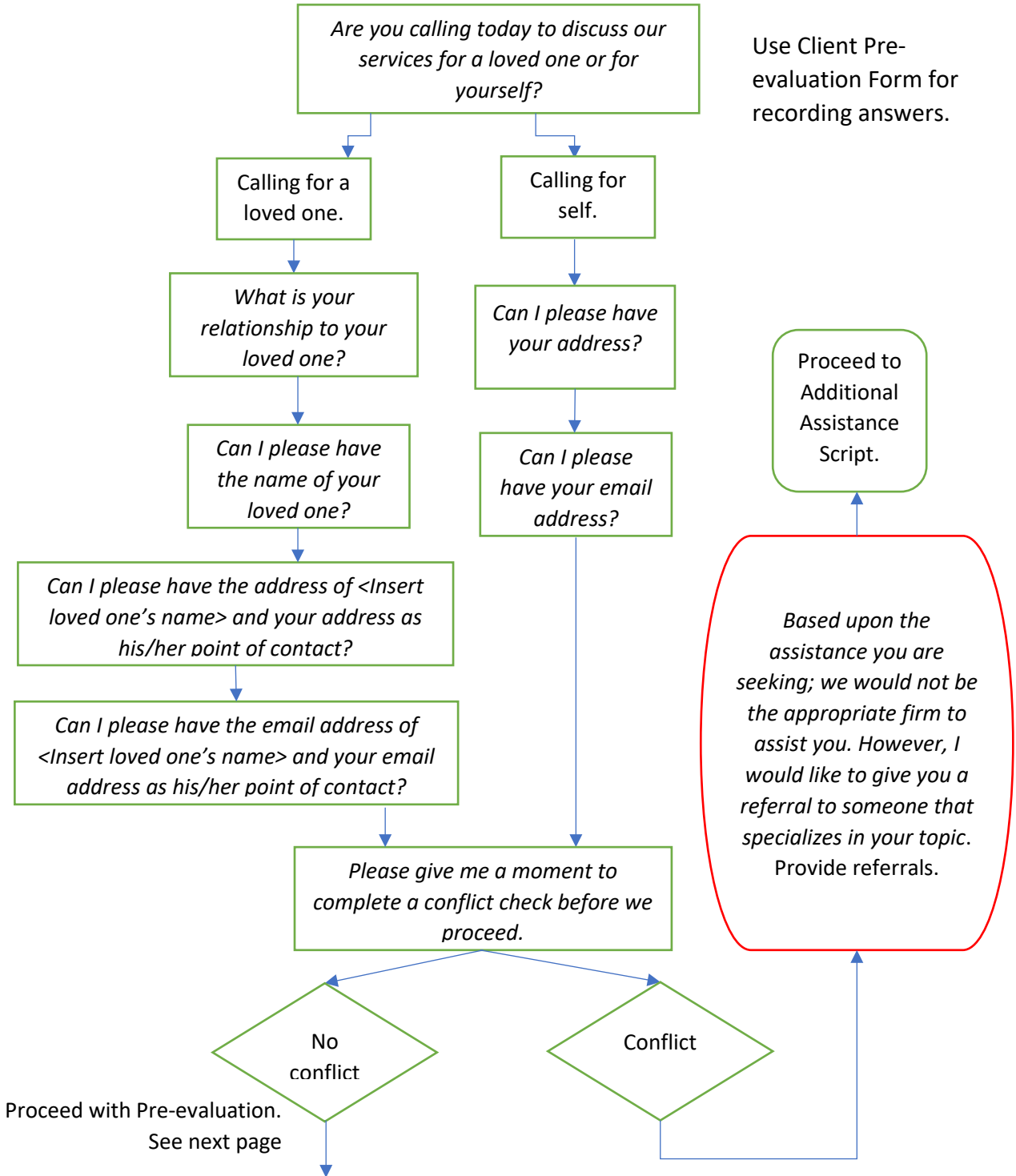
Phone Script

Name of Firm _____

Date: _____

Pre-evaluation Script and Conflict Check

Use Client Pre-evaluation Form for recording answers.





Phone Script

Name of Firm _____

Date: _____

Use the Client Pre-evaluation form as a guide to collect basic information.

Ask caller to identify issue(s). Record additional data as needed.

If I understand you correctly, you are wanting assistance with <issue(s)>? We can assist you with this concern.

Based upon the assistance you are seeking; we would not be the appropriate firm to assist you. However, I would like to give you a referral to someone that specializes in your topic. Provide referrals.

I would like to schedule a time for you to meet with one of our team members/attorneys.

Yes

No

Proceed to Additional Assistance Script.

Proceed to schedule meeting. See Scheduling Appointment with Prospective New Client.

What is your hesitation at this time to meeting with one of our team members/attorneys?

- Listen
- Repeat
- Address

See below Responses to Common Objections

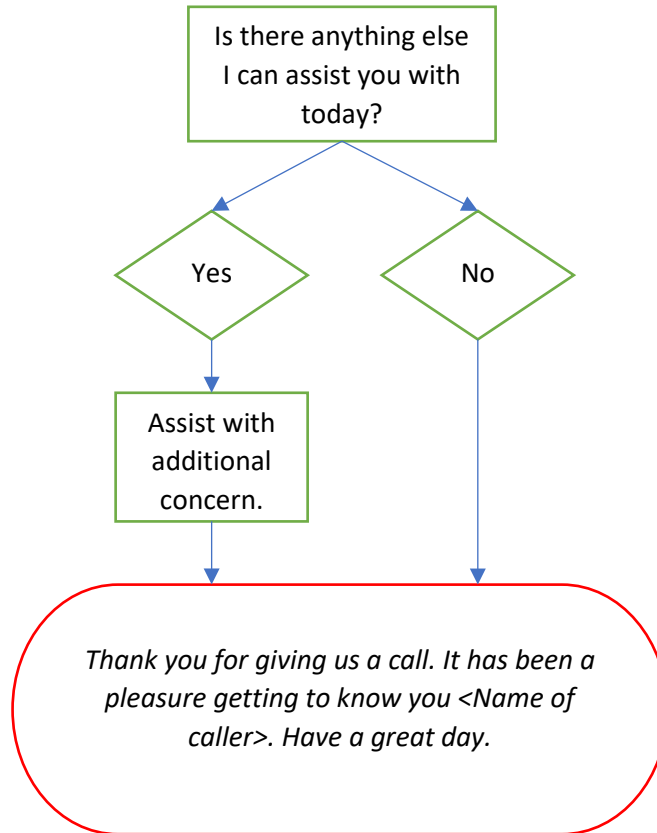
Ok

No

As we want to confirm that you receive the assistance you are seeking, one of my team members will be calling you within the next few days.



Additional Assistance Script



Responses to Common Objections

Client: *I'm not sure what I want to do.*

Response: *I know this must be very difficult for you. Even calling a **lawyer/other profession** is difficult and I am glad you did. That was a really good decision. So, the next good decision would be to move forward with why you called us because you are concerned. What is your biggest concern?*

Client: [Responds with biggest concern.]

Response: *That is my concern for you too and I do not want to delay. You have taken the effort to make the phone call. How can we make this as easy as possible for you? Is [Day] at [Time] good for you?*

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Part 4: Client Maintenance Plan

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Name of Firm

Initial Maintenance Plan Enrollment procedure

Date: _____

1. If a client is appropriate for the Maintenance Plan, offer enrollment in plan at conclusion of service. Enrollment can be offered by mail or by phone. See *Phone Script for Enrollment*.

If client is not appropriate for the Maintenance Plan, consider instead following *Post Closure Procedure*.

2. Create Maintenance Plan file whether physical or digital to contain the following:
 - Copy of fully executed Maintenance Plan agreement
 - Payment receipt
 - Recurring Payment Authorization, if applicable
3. Process payment. See *Accepting Payment Procedure*.
4. Add recurring appointments like quarterly calls to appropriate calendar.
5. Schedule reminder of end of Maintenance Plan period one month prior.
6. Mail original fully executed Maintenance Plan agreement to client with letter listing all Maintenance Plan appointments in coming year.

The logo for Victory Walk Coaching features a large, stylized letter 'W' composed of three overlapping, downward-pointing chevron shapes. The left and right chevrons are a light beige color, while the central chevron is a dark maroon color. Below the 'W' is the text 'Victory Walk' in a bold, black, sans-serif font, with 'Coaching' in a smaller, regular weight of the same font directly underneath.

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