

BUILDING RELATIONSHIPS THAT LAST

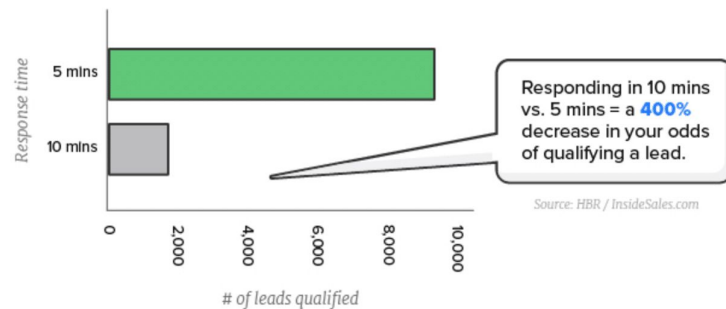
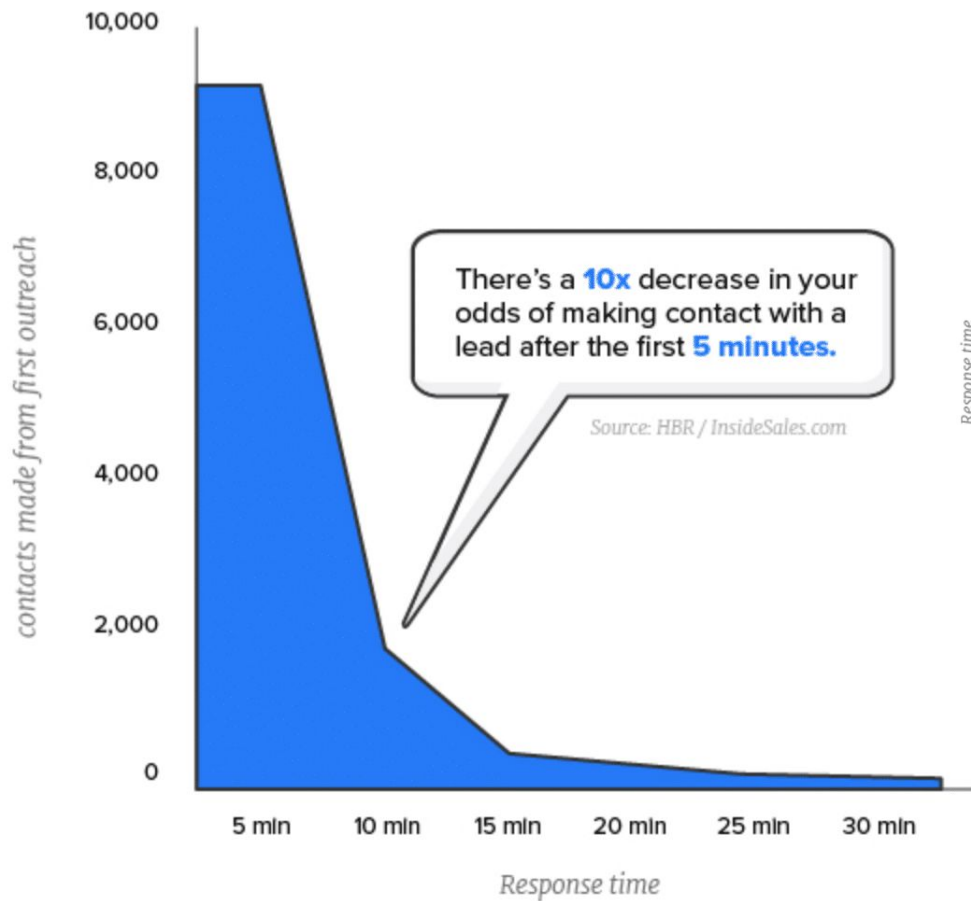
March 2018



FWMWEBINAR.COM

1. The Follow-Up and Introduction





The Follow-up and Introduction

1. Test thank you pages and emails.
 - a. Do they explain what to expect next?
 - b. Do they allow the person to take next steps as needed?
 - c. Are they succinct, yet informative?
 - d. Are they formatted in a visually appealing way?
2. Test your response rates.
 - a. What is your average call back time?
 - b. Can you implement any processes to improve?
 - c. Consider an intake team like [ALERT Communications](#) for overflow and afterhours.
3. Respond with kindness and empathy.
 - a. Is your staff answering and responding in a friendly manner?
 - b. Are you empathetic to the situation they're in before you nail them with qualifying questions?
 - c. If you can't help, are you doing your best to point them in the right direction?



Facebook Message Responding



The 🟢 **Very responsive to messages** badge shows people which Pages respond quickly and consistently to private messages. To get the badge, your Page must have achieved both of the following over the last 7 days:

- A response rate of 90%
- A response time of 15 minutes

When your Page has the badge, anyone can see it. When your Page doesn't have the badge, only people who help manage your Page can see responsiveness info on your Page.

If you have someone leave the Facebook messenger window open.

Learn how [response rate and response time](#) are defined for your Page.

Response Assistant

Send Instant Replies to anyone who messages your Page

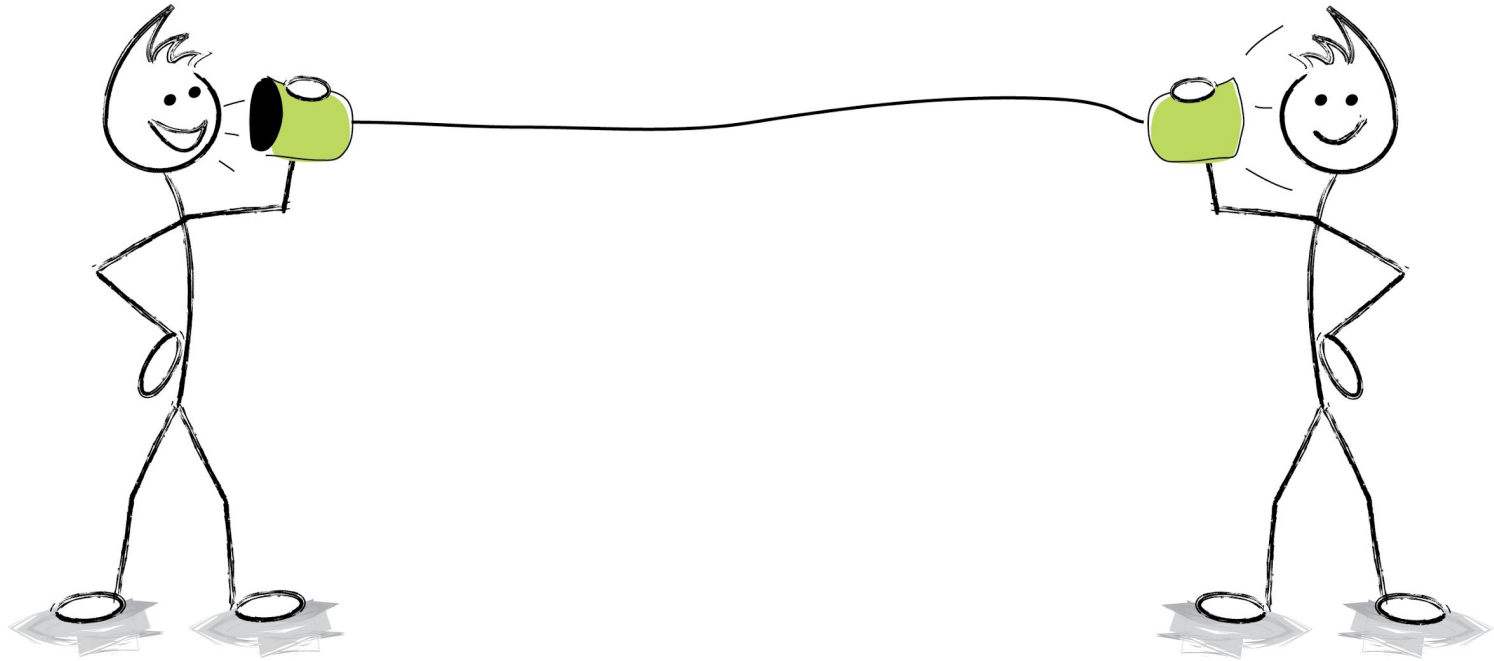
Instant Replies are a good way to let people know that you'll respond soon

"Thanks for messaging us. We try to be as responsive as possible. We'll get back to you soon."

On

Change

2. Intake and Communication



11 Basic Skills of Hospitality

1. Smiling

- a. Creates a friendly atmosphere and shows you're happy

2. Greeting

- a. A clear and warm greeting will help calm the prospect.

3. Conversing

- a. People love to hear their name, so once you have it, use it!

4. Using proper telephone etiquette

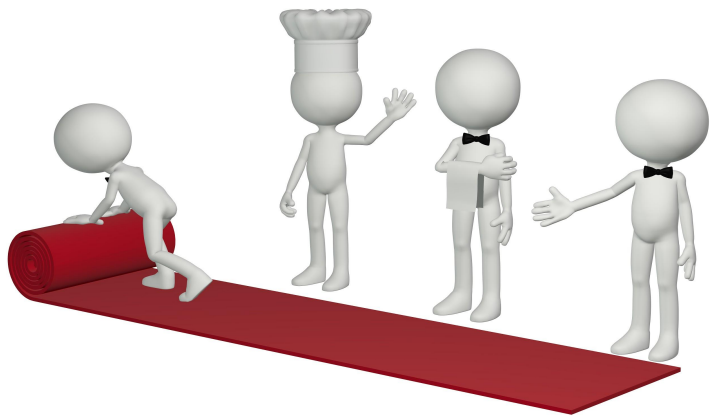
- a. Be prompt and avoid putting people on hold. If necessary, thank them for their patience.

5. Providing assistance

- a. All staff should be able to assist when needed and offer further assistance at the end of each conversation.

6. Giving attention

- a. It's the little things that make someone feel comfortable. Keep them up-to-date!



11 Basic Skills of Hospitality

7. Providing positive endings

- a. Don't let people leave with a bad taste in their mouth if you can help it.

8. Following through

- a. Did you receive feedback? Respond to reviews, and follow through with requests.

9. Maintaining a positive attitude

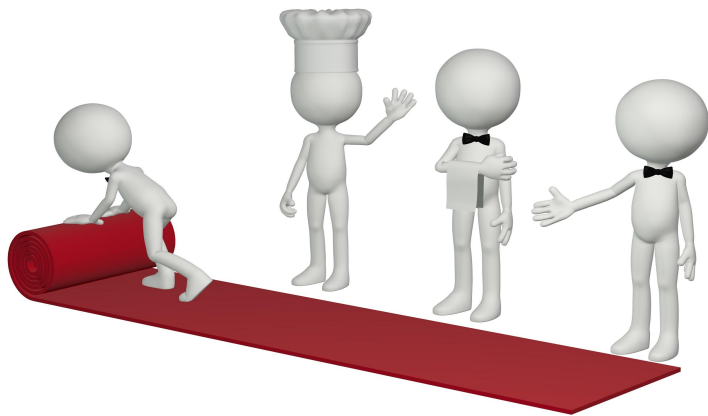
- a. Positive thoughts bring positive outcomes :)

10. Making positive decisions

- a. Keep your emotions out of it. It can be hard when it's your name on the door.

11. Keeping a sense of humor

- a. [10 ways to keep your sense of humor](#)



Intake and Communication



"What if, and I know this sounds kooky, we communicated with the employees."

1. Establish a lead intake system.

- Do you have a clear chain of operations for potential client interactions?
- Do you have dynamic intake forms to streamline and track the process?
- Consider a more robust intake software solution like [Captorra](#).

2. Define each staff member's job duties and tasks.

- Are potential clients going to speak with an attorney and if so, when?
- In other industries, this is referred to as project management. Do you have clear definitions on who gets what, when, and where?

3. Clearly communicate next steps.

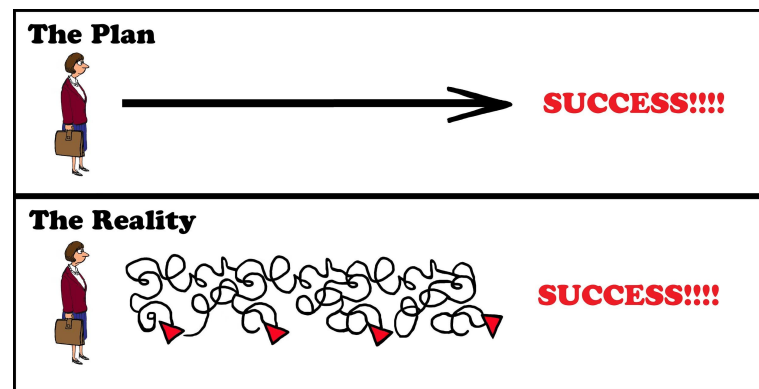
- If you need more information communicate what, when, and how that information should be gathered.
- If you're taking their case, clearly communicate the next steps.
- If you're not taking their case, let them know if there are other options available to them and if there aren't, console (if needed) and gently end the conversation.

3. Moving Forward...or Not



Moving Forward...or Not

1. Funnels for both accepted and declined.
 - a. Do you have an onboarding email/direct mail campaign for clients?
 - b. How about a campaign for those not moving forward?
2. Keep communications lines open!
 - a. The majority of bad reviews come from poor ongoing communication.
 - b. Are you continuing to keep clients in the loop?
3. Case management software will help.
 - a. What are you currently using?
 - b. Are you happy and what is it missing?



4. Maintaining the Relationship



Maintaining the Relationship

1. Conditional review request.

- a. Would you recommend us to friends/family?
 - i. Yes: Send them to leave a review
 - ii. No: Send them to a feedback page, so they can let you know what happen.
- b. Focus on 1 or 2 review sites at a time and build from there.

2. Stay relevant with newsletters.

- a. Are you doing a print newsletter?
- b. Are you doing an email newsletter?
 - i. New DSS feature allows you to pdf email newsletters with a click.

3. Are they following you on social media?

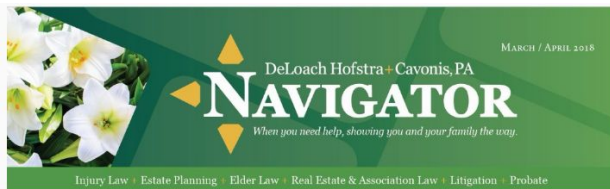
- a. Good way to keep in touch and show your community efforts.
- b. Make it part of the onboarding process.

4. Reachout unexpectedly.

- a. Birthday cards/gifts can go a long way in getting them to continue referring.



Building Relationships



Dear Friends,

Happy Spring!

With the start of a new season, we are introducing an exciting new appreciation program for our clients! We value our clients at DeLoach, Hofstra & Cavonis, P.A. and want to say thank you in a special way. That's why we're inviting all of our clients to join [DHC VIP](#), our new **VIP program**! It is absolutely free to the many thousands of people we've had the honor of serving over the past 40+ years. You can read more about this exciting new program, including the benefits and how to join, in this issue.

Your printed version of the March / April *Navigator* will arrive in the mail soon but in the meantime, please download your *eNavigator* by [CLICKING HERE](#).

Also in this issue:

- Discover the benefits of having a Designation of Health Care Surrogate for Minors
- Meet bookkeeper Alicia Greer
- Try Rep DeLoach's Slow Cooker Vegetarian Chili
- Get a free copy of Rep's [new book on estate planning](#)

DeLoach, Hofstra & Cavonis

DeLoach, Hofstra & Cavonis are consistently getting great reviews on a wide variety of sites. Learn how they became a reputation management success story!

[LEARN MORE](#)

Upcoming Educational Seminars

Our educational seminars are free and open to the public so we welcome all friends and family. All seminars are presented by attorney [Rep DeLoach](#) in the DHC Law Library:

Estate Planning Essentials

Tuesday, March 20, 5:30 p.m.

- Wills v. Trusts
- Probate and Probate Avoidance
- Medicaid and Asset Protection Strategies
- Incapacity Planning: Durable Powers of Attorney and Advance Directives

How to Qualify for Medicaid

Tuesday, April 3, 5:30 p.m.

- Income/Asset Rules for Medicaid
- Common Myths for Protecting Your Assets
- Healthcare Crisis Management
- Irrevocable Trust Planning
- VA Benefits

For additional seminar dates or to RSVP, please contact Ashleigh Fisichella at 727-308-5441, ashleigh@dhclaw.com or visit dhclaw.com.

Chili Blaze & Country in the Park

[\(England Brothers Park, Pinellas Park\)](#)

Please join us as we compete with Rep DeLoach's vegetarian chili recipe in the Pinellas Park Fire Department's Chili Blaze this evening. Proceeds benefit the [Muscular Dystrophy Association of Tampa Bay](#). Read more in this issue of the Navigator or visit the [Chili Blaze](#) website. We hope you can join us for this



When you need help.

**DeLoach Hofstra
+ Cavonis, PA**

dhclaw.com



