

LAWYER ALERT



Stopping Medical Injustice

FREEDOM

Ruthlessly Delegating Your Way To

Everyone is replaceable, even you. To become a highly efficient law firm, you must master the skill of delegation. Otherwise, in 5-10 years, you will be in the same place where you are today.

There's good news: you can get your time back. You can actually become a law firm owner, do the things you need to do and live the way you want to live. You can get your life back by delegating the tasks that you don't want to do.

When you delegate ruthlessly, something magical happens: even if you're not present, your law firm functions. You know you should ruthlessly delegate, but you don't (I'm guilty too).

How to Run Your Law Firm Like a Machine

South Florida injury lawyer, Craig Goldenfarb, Esq., has a simple formula for delegation:

FREEDOM:

Give all tasks to your team member with the lowest level of competence at that task. Let the tasks flow downhill until it gets to the team member with the lowest level of competence.

"[M]y biggest role as CEO is to help every member of our leadership team take one big area of responsibility or large repeated task and delegate it either to someone else down the food chain, to outsource it, or to eliminate it."

John L. McCraw, Esq., McKinney, Texas

And the end result: a self-managing law firm, The Law Office of Craig Goldenfarb, that thrives in one of our nation's most competitive markets. Craig Goldenfarb, Esq. is the quintessential CEO for his law firm.

Define the Highest and Best Use of Your Time

What are the 5 things that you love doing more than anything else. Write them down. Next, write down the 5 things that you hate doing. Now, you know what you should be doing and what you shouldn't be doing.

Next, take the activities that you hate, and ruthlessly delegate them. Our law firm delegates the tasks that others can do better. You must replace yourself from the day-to-day activities of your law firm. Delegation just makes over practice more efficient and you get to focus on the work that you love.

"The temporary pain of documenting and delegating one task is worth a lifetime of freedom from that task."

Craig Goldenfarb, Esq.

John Morgan, Esq., founder of the largest plaintiff's law firm in the U.S., knows better than anyone that, "Graveyards are full of irreplaceable persons." If you think that you are the only person who can handle a task, you're sadly mistaken.

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Simple Delegation Systems for Law Firm Growth

These are our top 11 delegation practices for plaintiff's law firms.

DELEGATION #1: **LIEN RESOLUTION:**

Lien resolution is time consuming and horribly boring. The lawyers at Precision Resolution (PrecisionLienResolution.com; 716-712-0417) in Buffalo, NY are experts in lien resolution and we use them for every case.

For a one-time fee, we offload this responsibility to Paul Loudenslager, Esq. at Precision Resolution (loudenslager@precisionlienresolution.com) and the results have been nothing short of amazing.

Medicaid and Medicare liens in the sum of \$500-\$600k have been reduced to less than \$2k by the experts at Precision Resolution. With these results, we look like superstars to our clients and the case expense is reimbursable at the end of the case. Once you out-source lien resolution, you will never look back. And just think of the time this will save for you.

DELEGATION #2:

MEDICAL RECORDS RETRIEVAL:

Retrieving medical records is time-consuming and following up on requests for medical records is tedious. This is not the highest and best use of anyone's time. Outsource it!

We use ChartSquad to track down medical records. It's a seamless process: our clients sign an authorization, we upload the authorization to ChartSquad's portal, and ChartSquad retrieves the medical records. For an extra fee, imaging films are provided on a flash drive for ease of copying and service upon defense counsel.

ChartSquad only accepts medical records in electronic format, so you will not be charged more than HITECH's "patient right" of \$6.50 for electronic medical records. ChartSquad follows up on outstanding requests every 3-4 business days and if there is a non-compliant hospital, they file complaints with the U.S. Office of Civil Rights. Best of all, your team won't have to do any of the work.

ChartSquad integrates with the top case



management software providers, e.g., SmartAdvocate and FileVine, which allows them to upload the medical records into the appropriate client's file in your case management software. This eliminates the tedious steps of scanning and uploading the medical records.

ChartSquad's founder and CEO, Chris Carpenter (chris@chartsquad.com; cell: 949-813-8450) is a passionate supporter of civil justice and he will give you direct access to him. If you sign up with **Referral Code 9E0C0FD2**, you will receive \$250 in free services.

DELEGATION #3: **PROBATE WORK:**

Wrongful death cases require extensive probate work and this is the type of work that we abhor. When probate work is needed, we simply shift the work to our virtual probate paralegal and let her team do everything, including client communication.

For a reasonable hourly fee, we delegate all of our firm's probate work to a virtual probate paralegal. Rebecca Cullen, CEO of Virtual Paralegal Associates of NY (888-995-3168; rcullen@virtualparalegalny.com), has 30 years of experience in trusts and estates and she and her team of probate paralegals do a fantastic job.

DELEGATION #4: **DRAFTING DISCOVERY RESPONSES:**

Drafting discovery responses is tedious work for your paralegals. What can you do to make the work of your paralegal's easier?

Sandy Van, Esq., CEO of Legal Support Help (702-690-4044; www.LegalSupportHelp.com), is a master delegator who manages one of the most successful plaintiff's firms in Las Vegas. For reasonable hourly fees, a virtual assistant at Legal Support Help will take care of case management and administrative tasks.

We use a virtual assistant at Legal Support Help to format discovery responses. When we receive discovery responses from defense counsel, our virtual assistant at Legal Support Help reformats them into Microsoft Word and enters them into our case management software in a Question and Answer format. This makes the work of our paralegals much easier and this is completed within 24-48 hours.

DELEGATION #5: **CLIENT COMMUNICATION:**

What is the most common complaint of clients? Lack of communication from their law firm. It's nearly impossible to stay in contact with your clients, but what can you do?

Hire a part-time or virtual assistant whose sole job is to call your clients. Our law firm's "Client Care Advocate", Beverly "Bev" Davis, lives in Iowa. Our Client Care Advocate has access to our case management software and gets monthly updates about the status of our active cases. Our Client Care Advocate calls our clients at least once every 3 weeks, asks for updates about their medical treatment and gives them an update.

On holidays, birthdays and special occasions, our Client Care Advocate sends cards to our clients, teddy bears and small gifts that lets them know we care. Turns out, these small touches mean a lot to our clients who rave about our Client Care Advocate. Every law firm should have a Client Care Advocate.

DELEGATION #6: **RESPONDING TO EMAIL:**

You have to get out of your inbox. Responding to email is not a productive use of time for anyone.

Delegate your inbox to a team member or virtual assistant and ask them to respond to every email they can. If your assistant does not know how to respond to an email, ask them to flag it and you can respond to email in batches once or twice a week.

DELEGATION #7: **SCHEDULING:**

Acuity Scheduling (www.AcuityScheduling.com) is a tool for online scheduling of appointments. You can set the dates and times that you are available for consultations with your clients and let your clients book themselves, i.e., "available for consultations on Tuesdays from 4 p.m. to 5:30 p.m."

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Acuity Scheduling integrates with Office 365 and Google Calendar, so the appointments can be automatically added to your calendar. Acuity Scheduling also sends confirmation of the appointments via email and text messages to your clients, and you can embed the online scheduler in your website.

DELEGATION #8:

INTAKE/NEW CASE CALLS:

Intake takes a ton of time. An intake specialist should handle your new case calls and determine whether the new client meets your criteria for a qualified lead. For our law firm, a qualified lead is one that involves a catastrophic injury or death, e.g., death, brain injury, paralysis, blindness or loss of limb.

The data for the new lead is entered in our firm's intake and lead tracking software, Lead Docket (www.LeadDocket.com; 801-657-5228), and we have an automated drip campaign with KEAP (formerly Infusionsoft) to follow up with new clients. Every phone call is recorded and transcribed via CallRail (www.CallRail.com) and when certain keywords are used during the phone call (e.g., death, brain damage, paralysis, etc.), a text message is sent via CallRail to alert one of our team members.

If your intake specialist determines that a lead meets your criteria, then it should be transferred to a lawyer. But doesn't this violate the rule that you should delegate as much as possible? Yes, but the goal is to be different from every other law firm. Qualified leads should be handled by lawyers, not intake specialists.

DELEGATION #9:

MARKETING AND SALES:

John Morgan, Esq. has 20 sales persons whose sole job is to call lawyers and talk with them about referring clients to his law

firm. John Morgan, Esq. doesn't have the time to talk to all of these lawyers, so he has someone else do it. Morgan & Morgan gets 40k to 50k new clients/year from the work of his sales team.

Don't have a sales force to contact potential referral partners? Hire a virtual assistant. Our Client Care Advocate calls our referral partners to schedule lunch dates.

Having lunch with current and prospective referral partners is the highest and best use of your time. When you spend time building and nurturing relationships with referral partners, you are setting yourself apart from every other lawyer (who stay in their office most of the day).

DELEGATION #10:

APPEALS:

Our law firm outsources our appeals to the best appellate lawyer in New York, Michael J. Hutter, Esq., a brilliant appellate lawyer, professor of evidence and the most knowledgeable lawyer I know. Our law firm doesn't spend a minute on appeals. We just let Mike do his thing and we are the lucky beneficiaries.

DELEGATION #11:

FINANCIAL PLANNING FOR INJURY VICTIMS:

Once a case is resolved, we turn over the financial planning process to Timothy J. Denehy, C.F.P., a certified financial planner with Forge Consulting (860-239-0094; tdenehy@advocacywealth.com).

Timothy J. Denehy, C.F.P. is simply the best in the industry when it comes to financial planning for injury victims and those affected by the death of a loved one. Knowledgeable, caring and honest, Tim crafts customized structured settlement financial plans for our clients. If you have the chance to work with Tim, you'll never



have to worry about structured settlement planning for your clients.

The Ultimate Goal for You

When you become a master delegator, you are no longer the hero of your law firm. You stop micro-managing your team and your team members can do their jobs without your interference. Work gets done while you're away and you make steady progress toward your ultimate goal: a self-managing law firm.

A self-managing law firm is one that functions in your absence. The beauty of a self-managing law firm is that you get to spend more time (ideally, 80-90%) doing the work that you are passionate about and only you can do. And isn't that the reason you became a lawyer?

But don't take my word for this. John Morgan, Esq. built the largest plaintiff's firm in the country based upon a simple formula: "We all think we are more important than we are. The sooner you realize that you are not irreplaceable, the sooner you begin to delegate and become more profitable."

Just maybe John Morgan, Esq. knows what he is doing.



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MASTERMIND
EXPERIENCE

Your Invitation to a Masterclass in the Business of Law..in PARADISE!

What is the **Mastermind Experience**? Simply put, a masterclass in the business of law. The highest achieving business owners/lawyers from across our country (and Canada) get together for 1 day to challenge each other, collaborate and share best practices. There's nothing like it.

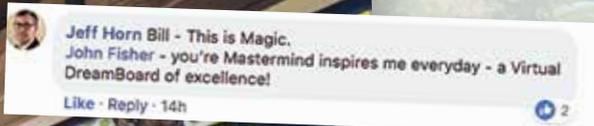
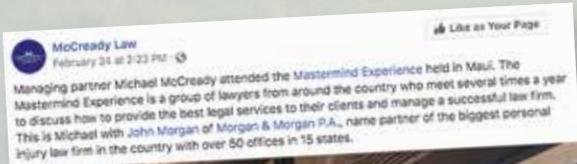
Amazing lawyers share everything they know with you, and you will leave with a new mindset that anything is possible for your law firm. You will make new friends, build new relationships and along the way, discover new marketing and management solutions for your law firm.

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The Business of Law...in PARADISE!

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The **Mastermind Experience** is an investment in your future.

Paradise Awaits for the Mastermind Experience

And on February 18, 2022, our mastermind will be held in paradise in the gorgeous Dutch Caribbean island of Curacao. Curacao was handpicked for our mastermind for its beaches, charming Dutch city, Willemstadt, and the best scuba and snorkeling in the world. Our resort, the Marriott Beach Resort, has a fantastic beach, huge pool and great restaurants. You won't want to leave!

We will have some fun too. As part of this adventure, we will have a private catamaran excursion to Klein Curacao, a semi-private island a few miles from the mainland and an ATV trip around the coastline of Curacao. Klein Curacao has one of the best beaches you will ever see and there's a good chance we'll see dolphins and sea turtles.

Apply at www.MastermindExperience.com

Want to join us in paradise? You can apply to join the **Mastermind Experience** at www.MastermindExperience.com. If you have questions, you should go to www.MastermindExperience.com or call our event planner, Beverly "Bev" Davis at 914-466-3386 or John Fisher at 518-265-9131.

Let's make the start of 2022 something special for you in paradise.



When I went to my first Mastermind in November of 2017 - I had one employee who worked 9 hours a week. Now we will hit 10 employees 9 full time and 4 lawyers come October. Wouldn't have been possible without the advice of people reading this



Connecticut Trial Firm, LLC

Personal Injury Lawyer

Connecticut Trial Firm, LLC

19 hrs

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