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HOW TO GET YOUR FIRST AND NEXT CASES



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Getting Your First and Next Cases

There are many places to meet potential clients. Meet them in person as well as on line. Where's the best place to meet potential clients? Wherever the clients go is the best place to meet them (i.e. the events they attend, the organizations they belong to, etc.) The answer to this question is going to vary depending on your ideal client. Do they go to meetings at the Chamber of Commerce once a month? Do they go to professional association meetings? Where do they meet? They meet somewhere. Use your investigative abilities to find your prospects.

One time I went to a Chamber of Commerce meeting. When I walked in the room I spoke to the woman who organized it and I said, "I'm a legal nurse consultant. I'm interested in meeting attorneys. Do you have any members of the Chamber who are attorneys?" And she said, "Oh yes, we have." She gave me the name of a person, and I said, "Do you see her in the room?" And she said "Yes" and pointed her out to me. I sat down in an empty seat next to her and we started talking. She said, "Oh, what a coincidence. You work with attorneys. Imagine. We're sitting together." And I thought, "Hmm. Not such a coincidence." Use your ingenuity to find your prospects.

Nurture Your Sphere of Influence

Your sphere of influence is the people that you have some connection with and even the people who *those* people have connections with. Who do you know who is an attorney? Who do you know who knows attorneys? There are lots of other ways to connect with people we would call your sphere of influence. Much of your business within the next year will come from them. So the question becomes, "How are you staying in touch with those people?" Here are some ways to network:

1. You may prospect face-to-face or online through your website, Facebook, Twitter, or some of the other social media sites. Be cautious about overt selling on social media. Many people are turned off by sales pitches made on social media sites. *Network* through social media. LinkedIn is useful for this purpose. You can do searches for the people you are trying to reach. If one of your primary connections is connected to that specific person, you can ask for an introduction. You can also send an inmail directly to that person if you have that level of membership in LinkedIn. Learn more about using social media for marketing in Patricia Iyer, *Social Media for Legal Professionals* at www.patiyer.com.
2. Join a networking group such as LeTip or Business Network International. You'll meet people from all different walks of life. The greatest benefit may not be the people that are in your group, it's who they know. Use networking effectively. A lot of people spend a lot of time networking, but not all networking events are created equal. You could be in a roomful of a lot of people and have nobody in that room who needs your services or knows anybody who needs your services. That's probably not the best use of your time. You can also be in a roomful of people where there's only one person

who needs your services and that could be a very good use of your time. You don't have to be in a roomful of a lot of people in order for it to be a good, productive use of your time.

3. Join the local chapter of your professional association. Network at the meetings. Pick a group where you like the people because you're going to be spending a lot of time with them. Look to see how you can help others. When you are giving to them, they are more likely to return the favor to you.

Think about the benefits you offer an attorney. We've got to quit thinking about marketing LNC services and start thinking about how we're going to solve an issue or a problem for that attorney. You can't just go out there to sell your LNC business by talking about your services first. If you say, "I can do a medical chronology", remember so can their paralegal! You've got to define how you are different from a paralegal. You've got to think like an attorney. If you're sitting in that office every day, day in and day out, what would you be struggling with? Is it because you have electronic medical records that you cannot make heads or tails out of because you're not used to seeing them in that format? Is it a matter of locating an expert? Is it a matter of understanding a particular medical condition?

Some LNCs have gotten their start by assisting a friend or family member with a medical malpractice suit. The LNC's understanding of the medical records and the ability to prepare a summary has gotten the attention of the attorney handling the case.

Some LNCs have gotten work by presenting a seminar for attorneys. You demonstrate your expertise, answer questions, and establish your credibility. Offer a one hour program to get your foot in the door. Once you've got your foot in the door and are finished with the continuing legal education, the attorney may say, "I've got some questions for you. I have a case I want to discuss."

Identify attorneys and law firms you want to work with. There are many different ways that you could start a relationship with the firm. The first way you can do this is through a referral and, of course, this is the way that everybody wants to grow their business. A referral is somebody who tells somebody else about you and then there's a connection and a relationship starts.

Another way to get your relationship going with the attorney is to request an introduction. This is overlooked in a lot of cases. You may request an introduction as an email introduction. This is where somebody you know knows somebody who needs your services. You ask the person you know to create an email with your name and the other person's name on it, a little bit about each of you and then just type "enjoy" and hit send. That way you have permission to interact with the attorney and to request an introduction or meeting. This has been a very successful way of starting a relationship.

Your Competition

Successful companies seek effective ways to let the customer know that they're important and to stand out against the competition. Know your competition. In many

fields the level of competition falls into two layers. One is the experienced business owner who has a client base that has been built up over the years. The other level is people who are trying to get into the field or maybe starting with a few clients and then building up. At that level there's competition in terms of quality; there's competition in terms of pricing.

There are some legal nurse consultants who underprice their services in order to get the work and therefore making it difficult for those individuals who charge what would be a more reasonable level for their services. Do not make this mistake. It is far harder to raise your prices to a reasonably competitive rate than it is to start at that rate. You devalue your worth by undercharging.

Here is a strategy that does not work. Do not call up your local competitors with established businesses, and say, "I want to be just like you. Please tell me everything you know." One naive legal nurse consultant used this approach with me last year when I met her at a conference. She sidled up to me, rubbed her shoulder against mine and said, "You're going to teach me everything you know so I can start my business in your backyard." In a word, "no". We have a business to protect, a client base that uses us, and strategies that we are not ready to share with local competitors.

Here is another strategy that does not work. Don't call up a local legal nurse consulting firm, pretend to be an attorney or paralegal, and ask for the LNC's fee structure. We can spot you. We know when you are faking it. We are protective of our information.

When a Prospect Calls

You may be approached by a potential client through fax, email, phone call, or an in person conversation. How do you handle this inquiry? The person may simply call for information, such as rates for services, or with a specific case in mind. Your intake system is critical because quite often it could be the first impression that a client is going to get of you or your company. Have a dedicated phone with a message on it that basically said who they were getting, so that they could leave message. If you have young children, make sure they are trained to not answer that phone line. Have a reliable answering machine attached to that line, or use your cell phone as your business line. Consider a free service like Google Voice, which transcribes voice mail into emails. If you have somebody else who answers your phone for you, it's important that they are well versed in understanding what services you provide and what services you don't provide.

Return phone calls within 24 hours. If you don't, the chance of losing that potential client is great. Let's assume you are currently working in another job but you are trying to expand your practice in legal nursing. Consider this: what if I am at the hospital for 12 hours and I get a phone call. How do I get back to that person within 24 hours? One thing you can do is plan on returning that phone call during your lunch time or break. If you work a 7-to-7 shift you are going to need to call the attorney when he is there. You are better off trying to find a nice quiet spot, return that phone call within the 24 hours, than waiting till you get a day off and then try to return the call.

If you don't provide a service the attorney is inquiring about, establish yourself as a resource to at least send her to someplace else. Set her up with somebody you know who might be able to handle the case.

I recommend using an intake form that is customized to your needs. Record the essentials about the attorney, the case, the deadlines, and the services needed. Include a checklist to show the steps you followed in response to the inquiry. Enter this information into your database. The intake system is a critical part of the business. Having a systematic way of recording that information saves a lot of trouble, in the future when you are trying to figure out where are you on that particular inquiry.

If you develop systems at the beginning of your business, when you start having a lot of cases as your practice grows, you will have a sound foundation. When you start hiring staff, you will have a system that's already in place for them to follow.

When I first started my legal nurse consulting business, I bought a box of colored file folders. It had 7 colors in it. I assigned colors to different types of cases:

Red: A case I did as an expert witness for the plaintiff

Blue: A case I did as an expert witness for the defense

Pink: A case being completed by one of our expert witnesses for a plaintiff attorney

Grey: A case being completed by one of our expert witnesses for a defense attorney

Yellow: A non-expert witness case

Purple: A case completed by one of our physician expert witnesses

This simple system has saved several hours of work and aggravation. It makes finding a file folder much easier.

Looking at Your Data

Always think in terms of what data do you need. For example, what are the results of your marketing? When you get an inquiry about a new case, where did that referral come from? Was it an advertisement, another client, or a colleague? Your intake form should have a spot to fill in this information, and the data goes into your database.

What types of services are most requested? Are attorneys asking you to find experts, do research, create chronologies, or be an expert? This information will provide you with a sense of direction.

How much work are your clients giving you? Has that changed over the year? Let's say you were doing five cases a month for one attorney and all of sudden you realize, "Hey, nothing has been coming in from that firm." It's a signal that should stimulate you to ask why you are not getting more work. What happened? Did the attorney find another LNC? Did the firm close? Did the attorney leave? Or, you might find out that there was a problem and the attorney didn't say anything. She paid your bill but you never got another case from her again. Tracking what's happening in your business is a critical way for you to look for trends.

Be Visible to Get Clients

Be active in your community and your local chapter of the American Association of Legal Nurse Consultants (www.aalnc.org) and volunteer for responsibilities.

Consider visiting local schools and colleges and presenting what nursing had to offer. You may meet parents at various career days - parents who are attorneys, parents who work for insurance companies. This is another way you can get the word out about legal nurse consulting and about your business.

Be prepared to give your elevator speech. You need to be able to introduce yourself as a legal nurse consultant and add in one or two sentences about what it is you do. When you are face to face or talking over the phone to a prospect, you will have an opportunity to use your elevator speech. Cover your name, your business, and the benefits that you would provide to a client who is seeking to use your services. Your elevator speech should be direct, intriguing, and be stated in terms of the benefits you bring to your clients. Practice your speech until it naturally flows. The words and the phrasing of your elevator speech must be excellent. So wherever you go, have that presentation prepared as well as your business card. Once you have worked out your speech, include the words in your promotional material. Those words are already in place, so make it easy for you and understandable for your clients.

In your community there are social or civic clubs, scouts and churches. They offer and are often looking for community speakers to come in and talk. This is a great way to start to learn how to present yourself and what you do. Present it to the eighth graders or to high school students who are looking into careers. They are a great audience because they are starving for the information and it will help you to confirm your own verbiage in order to then go out and speak to an attorney group or to an insurance company.

A "Lunch and Learn" helps to boost your practice. Ask for permission to go to an insurance company or law firm with basic sandwiches and set up in their conference room. Sometimes you may be able to get an audience to actually sit down and eat. Give a brief presentation. Or all you may have is time to deliver an elevator speech as various people came in to grab a sandwich. It is a way to actually make people aware that you exist and what it is you do.

Advertising

Advertising may be the least effective and most expensive way you can market your services. Face-to-face contact is the most effective means when you are talking to attorneys. Look for ways to conserve your dollars. Inexpensive ads that have a long shelf life are a good choice. Put together post cards or self mailers. Print in small quantities; you may want to change your materials after using them for awhile.

Look for creative giveaways that will also have a long shelf life, don't invest in post it notes or candy with your name on the wrapper, for example. Attorneys will not hold onto those items. Look at the cost. While you can pay less per item by placing a larger order, think clearly about how long it may take for you to deplete your stock. Also consider the

storage space. I know one LNC company that bought sports bottles, which were big, bulky, and difficult to transport in quantity. It took forever for them to get rid of the bottles.

Be careful about putting your business card on a magnet. I heard about a legal nurse consultant who put her business card on her magnet and then the attorney put the magnet in her purse. It demagnetized the cell phone that was in the purse. And that legal nurse consultant got an unpleasant reputation for giving out magnets.

Strategies for Success

Keep your expectations realistic, while at the same time, set growth goals. While you may hear that a legal nurse consultant can make \$150 an hour, initially you may be working only 7 hours a month.

Recognize the first case is the toughest one to get. You may feel like you are beating your head against the wall trying to get that first case. You know you could go out and actually do a wonderful job if you could just get that first case. I remember talking to an attorney who did not want to hire me because I had never testified as an expert witness. I told him that unless someone gave me a chance, I would never have the opportunity to testify. He did not hire me but someone else did.

If you have never worked on a case but want to show a sample work product, take a case that you have read about. Create a scenario, and change the information up to make it fit the pattern of what you would prepare for an attorney. Save every actual case report you have done. Once it is settled or gone to trial, you can change names and use them as samples.

Starting a business can be all consuming. It can be challenging to maintain a business atmosphere when you have children at home. You may need to hang a sign on your door that states your business hours. You are in your office during those hours and should not be interrupted. When you work at home, it is tempting to let the work day stretch until after dinner. It's very difficult to find down time, difficult to find time to go on vacation. You may go to a beautiful beach resort and the phone's ringing constantly and you can't just turn that off. But if you don't make your priorities somebody's going to make them for you. If you need to carve out time out of the day for your family then that's what you have to do. You just have to put that on your calendar just like you do everything else.

Don't put all your eggs in one basket. So even though business may be good and cases are coming in you actually need to market when the case load is good so that you don't have as many of those bad times or down time. Don't wait until the down time to do the marketing or you'll be scrambling.

Make sure that you have savings and that you continue to invest in your own business as well --whether that's expanding your offers by obtaining another certification so that you can offer another service, or whether that is investing in an exhibit booth. When the

times are good is when you need to be investing in your company and use that investment for your future marketing.

Know your strengths and find others to help you with your weaknesses. You can't and don't have to enjoy all aspects of running a business. Focus where your strengths are, where your passion is, and those are the things that come easy for you. You have to do those other things such as planning or doing the unpleasant portions of business until you can get to the point where you can hire staff or someone to help you.

You have to continue to be organized. Know that there are going to be setbacks. Prepare yourself for setbacks. Be prepared for attorneys who complain about your work product, invoice, or delivery time. Address their concerns, show you care, and improve.

Make yourself do something towards the business every day, even if it's a matter of going to do some Internet research today to see what your competitors are doing. Or research www.Martindale.com to start a list of attorneys that you want to contact. Focus your effort every single day, even if it's only going to be for 15 minutes a day. Just make sure that every day you do something towards keeping your business on track. If you invest time into it, if you visualize it, if you can have a goal in mind for your business, you can achieve it. You really have to know what that business is going to look like and visualize that for you.

1. Read everything you can get your hands on about starting a business and marketing.
2. Spend some time developing new skills and relationships.
3. Visit web sites; not only of your competitors but also the attorneys that you want to target.
4. Attend chapter meetings for your LNC association.
5. Network with everybody. Tell everybody you have this business and what it is that you do.
6. Make sure that you have your elevator speech down. Be able to, in just 60 seconds; explain to people what it is that you do in a way that they can share with someone else.

No matter what your background is, being a nurse is the most important part of it. You have many choices: expert witness work, subcontractor to another nurse, or consultant who does medical record organization and chronologies, medical research, or timelines. Find what you enjoy, what you are good at, what you are knowledgeable at, what you can get passionate about. You can certainly specialize in those one or two areas. Then see where your practice takes you. Let it develop. Listen to what your clients want. Provide excellent customer service.

Resources

Jill Lublin, *Get Noticed, Get Referrals*, McGraw Hill

Ivan Misner and Robert Davis, *Business by Referral*, Bard Press

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