



## Unbundled Attorney Enrollment Script - Family Law

### STEP 1: Intro and Ask Client to Tell You What's Going On

**Outbound (Calling Clients):** I am calling for <Client>. <Client>, this is <Your Name> over at the <Law Firm Name>. <Client>, we received your request for assistance with your <child custody/divorce/family law> matter. Is it a good time to talk? Do you have something to write with? First, do you have any pending court dates? Do you have an attorney?

Okay <Client>, tell me a little bit about what's going on and I'll figure out how to help you. *(Let them explain problem for 1-2 minutes) and then ask questions below)*

### STEP 2: LISTEN and Ask Clarifying Questions

| DIVORCE                                                                            | CUSTODY/VISITATION                                     |
|------------------------------------------------------------------------------------|--------------------------------------------------------|
| Assets like homes? Cars? Business? Pensions?                                       | Are you separated? Yes, how long. Ever married? If     |
| IRA's Any Children Involved? Boys, girls, ages (all).                              | Yes: Are you divorced? What jurisdiction? (city/state) |
| How long have you been married?                                                    | What is the mother/father's full name?                 |
| Are you separated? If Yes, How long?                                               | Where does he/she live, what city?                     |
| What do you do for work?                                                           | Children involved; boys, girls, ages (all)?            |
| <Client>, what is your monthly income?                                             | Who has the kids now? Where do they live?              |
| What does your spouse do for work? And his/her name? What is their monthly income? | How far is that from you?                              |
| Where does he/she live, what city?                                                 | How long have the kids been there?                     |
| How far is that from where you live?                                               | How often do you see the kids?                         |
| Is this contested or uncontested?                                                  | Are custody and/or visitation orders in place?         |
| Have any (other) papers been filed to a court?                                     | And is support being paid? <i>If yes</i> , How much?   |
| Have you been served or served any court papers?                                   | Is it voluntary or court ordered?                      |
|                                                                                    | What is your monthly income?                           |

### STEP 3: Find Out Client's Primary Goal and Immediate Legal Need

Ok, <Client>, if you could have your <divorce/custody/visitation case/situation> turnout exactly the way you want, what would you like to see happen? Just be as specific as you can. *<repeat back client's goal to them, then ask>* Is there anything else?

### STEP 4: Discuss Next Legal Steps and Scope of Work

Okay, so I understand what you need, and I can help you with this case. I have handled a lot of cases like this, and I will do everything I can to make sure you get the best possible result.

The next thing that we need to do is prepare and file ABC (*petition for, motion for, answer to, etc...*), this is so we can accomplish XYZ (*Client's Primary Goal*).

<Example: "You have already been served with paperwork and you have X number of days to file your answer. We need to file an Answer and/or Counter Petition to let the Court know that you are seeking XYZ (*Client's Primary Goal*).">

### **STEP 5: Educate on Traditional vs. Unbundled Model**

Ok, have you spoken to any other attorneys about this?

Yes Did they give you an idea of what they would charge to handle this?

No: Do you have an idea of what most lawyers typically charge to handle this?

Most attorneys charge a retainer \$5k-10k (or \$3k-5k, *depending on your region*) to get started on your case and for most people this is simply too expensive.

#### ***Option 1 - Limited Scope***

<Client>, our firm is a lot more affordable because we can break up your case into segments and tailor the amount of service we provide you to your specific legal needs, and your financial budget. In your case, I would suggest as a starting point, that we can go ahead and (*describe initial scope of work*). <Then JUMP to **STEP 6: Provide a Quote**>

#### ***Option 2 - Full Representation on a Payment Plan***

<Client>, our firm is a lot more affordable because we allow our clients to start with a much lower initial deposit and then make payments along the way, so they can afford to have quality representation.

### **STEP 6: Provide a Quote with a Deposit & Payment Plan Outlined**

In order to represent you in this case we will charge a (*flat fee/initial retainer fee*) of <\$ Amount>. Now if you don't have that much available right now, that's fine. We can come up with a payment plan that's going to be workable for your budget, ok?

How often do you typically get paid? <*Weekly, Bi-Weekly, Monthly*>

Typically what we can do in these cases is \$\_\_\_\_\_ per <*week, bi-weekly, month*>, and we will also need \$\_\_\_\_\_ (*Deposit Amount Required*) before I can start representing you, ok?

What do you think you can put down as a deposit so we can get started?

1. *If they give a deposit amount that works:* Great, let's start with that as a deposit, and then we will set up the payment plan while we are on the phone together.

2. *If they offer to pay faster:* Great, we offer a 5% discount on the total if everything is paid in the first 30 days. Let's take the first deposit today and get everything scheduled so we can get started on your case.

3. *If they say that they can't pay the full initial deposit:* That's okay. Let's get started on the payment plan right now, and we can file your case as soon as you've made enough payments to cover the initial deposit. That way, we have a plan in place and we can get started preparing your case today.

4. *If they say that the recurring payment part of the plan doesn't work:* That's okay. Tell me what you are able to afford (weekly/bi-weekly/monthly) so I can go ahead and get started on this for you.

5. *If they don't provide any answer at all.* I am here to help you, and I am happy to work with you. What can you put down today so I can get started right away? Can you do X? Can you do Y?

### **STEP 7: Process Deposit, Set Up Payment Plan & Fee Agreement**

Okay great, so I'm going to open up a new file now and get started on the initial intake. What is the exact spelling of your name as it appears on your driver's license? Okay and your mailing address? Okay, and your best contact numbers? Okay and your email address? Okay, and your date of birth? Okay, and for the initial <\$Amount> deposit, you can use a debit card, credit card, or we can set up a bank draft. Which would you like to use?

Perform the following steps in real time while *they are* still on the phone, if possible:

1. Open Merchant Service application (on a mobile device or on your computer) and process the Initial Deposit either by taking their card/bank details yourself, or sending them a payment link to process payment in **real-time**. *(Important Note: Do NOT just email them a link they can use to pay later; have them pay the deposit right now)*
2. Schedule the automatic recurring payment plan *(Weekly/Bi-Weekly/Monthly)*
3. Email engagement letter and/or fee agreement to client for digital signature using a signature program such as Clio Grow, Docusign, Adobe Sign, etc. and have the client review and sign in **real-time** if possible as well.
4. Reiterate the next steps you will take and any steps the client needs to take. Schedule the next appointment.