

CONNECT CONVERT WORKBOOK



MARKETING BOSS



I DISAgree

I agree

RATE YOUR SALES SAVVY

Reflect on the three key qualities that define exceptional salespeople in law firms. Rate yourself on a scale of 1 to 10 for each attribute by writing a number next to each statement to gain valuable insight into your own sales acumen.

I AM A GOOD SALES PERSON ___

I AM GOOD AT SIGNING CASES ___

I AM THE BEST IN MY FIELD ___



CRAFTING YOUR SERVICE BLUEPRINT



This exercise will help you increase the conversion rates from leads who call. The goal is to use the lessons and exercises to improve the customer service you provide so you can increase the number of conversions you get from callers. When you do this consistently you will be able to inspire more people to agree to take the next step and actually follow-through.

WHAT ARE YOUR FAVORITE WAYS TO SERVE PNC'S?

A large, empty rectangular area intended for writing answers to the question above.

UNVEILING YOUR INNATE STRENGTHS



Reassure

Offer a warm smile and listen to client problems carefully. Let them know that we have the team, dedication, experience, and resources to help. Give them a chance to express what they feel.



Connect

Use techniques. Mirror their tone and language to create a feeling that you are like them and they can trust you. Share your name and call them by name.



Document

Gather important contact information including their full name, phone number, email, and case details. Make sure you repeat information back to double-check for accuracy and spelling.

WHAT CRITICAL ACTIONS COME MOST NATURALLY TO YOU?

A large, empty light gray rectangular area intended for handwritten notes or answers to the question above.



EMPATHY IN ANTICIPATION

PROFILING THE CLIENT

INSTRUCTIONS: Try to imagine who your ideal customer is. If you have different types of customers to target, that's okay. Just make sure that you follow this process for each segment. Start with an ideal customer type first. Use this worksheet to create a persona and outline some important characteristics.

First Name

Last Name

What Is Their Age Group?

What Is Their Gender?

What is Their Job Title?

Where Do They Live?

What Media Do They Use?

What is Their Life Like?

What Are Their Pain Points Related to Your Product and Services?

CRAFTING YOUR SIGNATURE GREETING

The first few seconds on the phone can help you establish the tone of the call. So think about your target customers and how they may like to be greeted.



Bilingual Greeting Example:

Thank you for calling Acme Law, how can I help you? ¿Cómo le puedo ayudar?

THINK ABOUT YOUR IDEAL CUSTOMERS AND WRITE DOWN HOW YOU CAN GREET THEM TO ESTABLISH A CONNECTION WITH THEM.

BUILDING YOUR EMPATHY TOOLBOX

Reflect on statements that naturally express empathy in your own voice. Think of phrases that convey understanding, care, and genuine concern and write them down below. Select language that exudes warmth, provides comfort, and validates the emotions of your callers.



Example:

It sounds like you need help right away and I am going to do everything in my power to help you.

WHAT STATEMENTS CAN YOU MAKE TO EXPRESS EMPATHY?

A large, empty light gray rectangular area intended for writing responses to the prompt above.

BUILDING VALUE TOOLBOX - SHOWCASING EXCELLENCE

Consider showcasing accolades, unique services, or other standout factors that define your uniqueness and set you apart in the legal landscape.



Example:

You need a criminal defense attorney you can trust and who speaks your language. We are bilingual, have an excellent track record with cases like this and will not stop until we have fought for the best possible outcome.

WHAT STATEMENTS CAN YOU MAKE TO ESTABLISH VALUE?

OBJECTION

NAVIGATION CHART

INSTRUCTIONS: When people object, it's important to consider what is beneath their objection. Is it fear, lack of trust, indecision, or failure to see value? Once you understand why people object you can handle it accordingly. Jot down some common objections you hear and how you can better respond to them.

OBJECTION:

RESPONSE



BELIEF

TRANSFORMATION MAP

INSTRUCTIONS: Write down every negative thought that comes into your mind when you are trying to connect with a client and think of a positive affirmation you can respond with instead.

NEGATIVE THOUGHT:

POSITIVE AFFIRMATION:



MEASURING YOUR WAY

TO SUCCESS

INSTRUCTIONS: Consider the overall goals that the firm has and use the form below to track your numbers daily and assess how much you are able to contribute. Set some goals based on your personal best and try to improve your personal best every day!

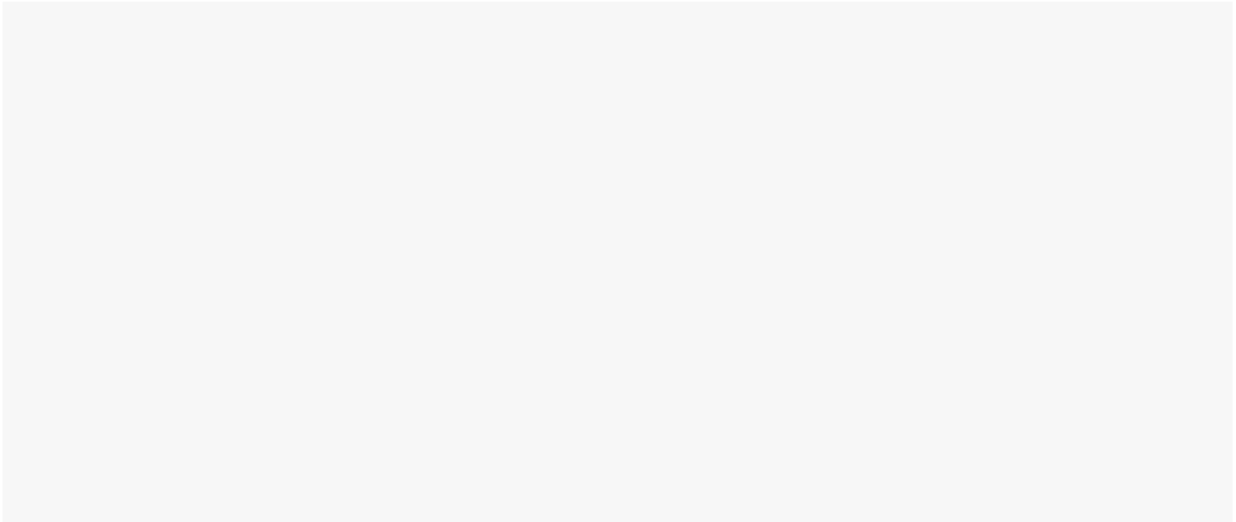
Connections	Conversions	
		Day 1
		Day 2
		Day 3
		Day 4
		Day 5
		Day 6
		Day 7
		Day 8
		Day 9
		Day 10

QUALIFICATION

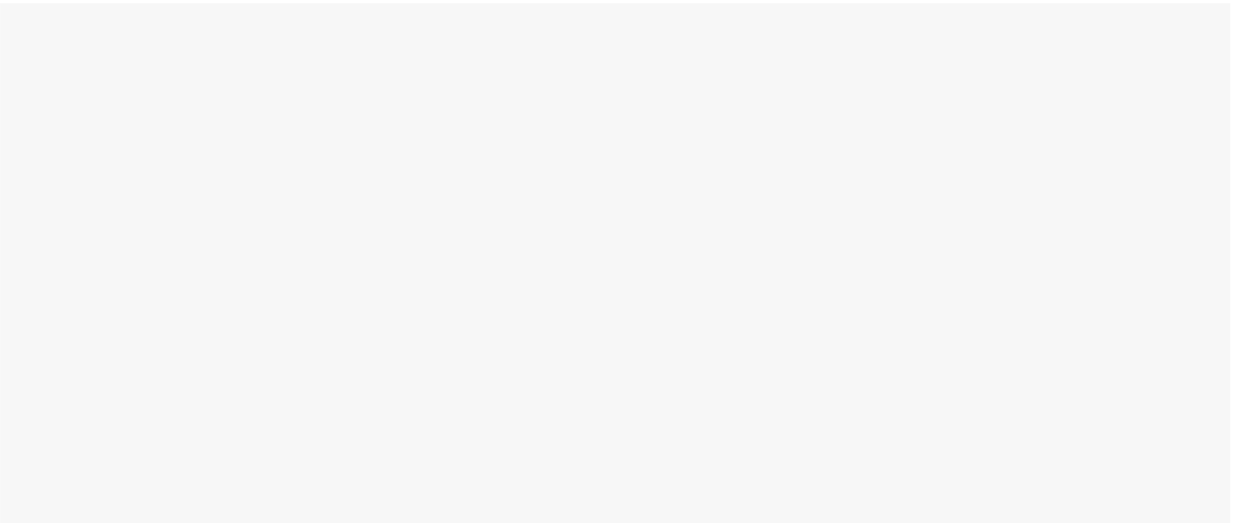
QUESTIONS ROADMAP

INSTRUCTIONS: When you engage with potential new customers, it's important to qualify their needs effectively. Use this worksheet to craft tailored questions for each case type. Simply write the case type above the box and populate it with qualifying questions you intend to ask. Feel free to incorporate suggested questions from the book and supplement them with additional queries that align with your law firm's specific criteria. This structured approach will streamline your client evaluation process and enhance the overall client experience.

CASE TYPE:



CASE TYPE:





THANK YOU

LET'S STAY IN TOUCH!

Let's continue to level up your law firm sales skills together! Dive into our expanded range of Connect Convert offerings, including workshops, on-demand courses, coaching sessions, certification programs, and more!

And hey, let's definitely connect on social media too! I'm eager to hear all about your achievements and experiences.

Thank you for allowing us to join you on your path to law firm sales success—it's going to be extraordinary!

"The essence of success in law firm sales lies in the art of connecting authentically with people."

-MARGARITA EBERLINE