



Create a Winning Playbook for Your Small Firm: Effectively Streamline Client Communication, and Prevent Ethics Complaints

May 14, 2019 - 1:00 p.m. - 2:00 p.m.

BAEC, 438 Main Street, Sun Room Auditorium, Buffalo

1.0 CLE credit: 0.5 Ethics, 0.5 Law Practice Management (approved for all attorneys)

Speakers:

Rafael Gomez, Esq., *Gomez & Becker*

Maddy Martin, *Head of Marketing and Partnership, Smith AI*

Learn how to generate the clients you want, keep existing clients happy, and bring the client lifecycle full-circle with exit interviews, online reviews, and other feedback that informs practice improvements.

You'll also learn best practices for protecting a client's sensitive information and proper messaging for ethical compliance. This hands-on workshop will provide practical knowledge and applications attorneys can take back to the office and apply immediately.

Learning Deliverables:

- Understanding the "Law Firm Funnel"
- Goal Setting and Success Benchmarks for Law Firm Growth & Effective Communications
- Technology Best Practices for Ethical Client Communication
- Inbound Lead Generation, Scheduling & Nurturing Workflows
- Effective Client Engagement & Intake Practices
- Sample "Scripts" for Phone, Email, Web Chat, and SMS
- End-of-Engagement Communications: Exit Interviews & Online Reviews

Erie Institute of Law Registration Form - Creating a Winning Playbook for your Small Firm

\$25 BAEC Member

\$30 Non-Member

\$5 Hard copy of material

The Erie Institute now provides material via electronic delivery. Please be sure to add your email address below. If you prefer a hard copy, check the box above and add \$5 to the registration fee. Thank you.



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Accreditation: The Erie Institute of Law has been certified by the New York State Continuing Legal Education Board as an accredited provider of continuing legal education in the state of New York.

Cancellation Policy: If you are unable to attend a seminar for which you have already registered, call the CLE department at 852-8687. For a full refund, notice of your cancellation must be received 48 hours in advance of a program. **Cancellations received less than 48 hours in advance are subject to a \$5 administrative fee.** Registrants who are pre-registered and fail to attend will receive course materials in lieu of a refund.

Mail or Fax to: Erie Institute of Law, 438 Main Street, Sixth Floor, Buffalo, New York 14202, (716) 852-8687, Fax (716) 852-7641. Register online at www.eriebar.org. Tuition assistance available. Please call to request an application.