

Black Wall Street LIFT Conversation Starter



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LIFT Conversation Starter – Hiring a personal or business lawyer

We know you don't want to do it. We know you don't even want to think about it.

Nobody does. Nobody wants to believe that something can go so wrong in their business that they need the services of a lawyer. That is the problem, you don't want to do it, so you don't do it, and then when you do actually need a lawyer you pay a fortune because you have no prior relationship.

We suggest you don't even think of it as hiring a lawyer. Think about it as building a relationship with a trusted business advisor who happens to also be a lawyer.

Your lawyer isn't just for the bad times, there are lots of really positive things that can happen in your business that requires a lawyer: incorporating, signing a big legal agreement for a project, bringing in a joint partner, infusing venture capital into your business. All of these require a lawyer, and none of them involve the phrase "being sued."

The LIFT system is here so that you can meet most of your legal needs all on your own, but having a successful relationship with your lawyer before you ever need them only has an upside.

Use this Conversation Starter to help find the right lawyer for you. And make sure to consider a Creative Business Lawyer who has been trained to be far more than just a lawyer to your business.

Conversation Starter and LIFT Profile

To start building a strong relationship with a new lawyer, or with your current lawyer if you have one follow these steps:

1. Make appointments with three different lawyers to have this conversation. If you already have a lawyer include them in this process.
2. Ask each lawyer the questions included in the Conversation Starter below.
3. Keep track of the answers while talking with the lawyer. You won't remember them later.
4. When the meeting is over write down your overall impression of each lawyer.
5. Once you select your lawyer transfer the information from the Conversation Starter to the LIFT Profile – Legal Advisor sheet.
6. Use the LIFT Profile – Legal Advisor sheet to have a follow up conversation with your selected Advisor and fill in the missing information.

LIFT Conversation Questions – Hiring a Personal or Business Lawyer

What type of lawyer are you looking for?

Personal

Business

Were you referred to this lawyer or is it a “cold call”?

Referred

Cold call

Questions to ask potential lawyers

1. How do you bill for your services?

(If the answer does not cover the following questions, ask them separately)

- Do you bill using a flat fee or project basis?
 Yes No
- Are any of your services billed on an hourly basis?
 Yes No
- Do you charge for phone calls?
 Yes No
- Do you charge for emails?
 Yes No

- Do we always agree on services before I am billed?
 Yes No
- Do you have an ongoing membership program?
 Yes No

What is the cost of this program?

Notes:

2. How do you respond to your client's needs on an ongoing basis?

(If the answer does not cover the following questions, ask them separately)

- How long does it take for a return phone call?

- How long does it take for a return email?

- Do you have a team to help if you are busy/not needed?
 Yes No

- Who will my main contact person be?

- What will our main form of contact be?

- Is there someone on the team to answer quick questions? Yes No

- Name of this person(s): _____

- Can I get direct access to you when I call?

How long does it take to schedule a meeting?

Notes: _____

3. How do you initiate communication with your client's on an ongoing basis? _____

(If the answer does not cover the following questions, ask them separately)

- Do you send out a regular newsletter? Yes No
How often? _____

• Do you send out regular emails? Yes No
How often? _____

• Do you have free resources/information I can access? Yes No

Notes: _____

4. Can I call you about any legal problems I have or just about matters within your specialty?

(If the answer does not cover the following questions, ask them separately)

• What legal areas can you assist me with?

• Do you have other lawyers you can refer me to for those areas you cannot help me with? Yes No

• How will you consult with me while I am finding and dealing with this other lawyer? Yes No

• Do I work exclusively with you on issues you specialize in or do I deal with a team of lawyers? Yes No

Notes: _____

5. In what ways can you help support my business and my business team?

(If the answer does not cover the following questions, ask them separately)

- **Do you have experience working with businesses similar to mine?**

- **Do you enjoy working with businesses similar to mine?**

- **What are some of the ways you can help a business like mine?**

- **How will you work with my CPA on reviewing my taxes?**

- **How will you work with my CPA on creating a tax strategy?**

- **How will you review/work with my Insurance Advisor to ensure I have the right insurance for my business?**

6. What happens if you die, retire, or take a vacation?

(If the answer does not cover the following questions, ask them separately)

- **Is there a plan in place to transfer me to a different lawyer for the long term?** Yes No
- **Is there a plan in place if something happens in the middle of a legal dispute/process?** Yes No
- **Will this new person have similar fees?** Yes No
- **Will this new person have a membership program?** Yes No

Notes: _____

Overall impression of this lawyer?

Do you feel you can trust this lawyer? **Yes** **No**

LIFT Profile - Legal Advisor

LIFT Law Firm

Name of Law Firm: _____

Address: _____

Phone number: _____

Website: _____

LIFT Legal Advisor

Name of Advisor: _____

Preferred/main form of contact: _____

Advisor's Email Address: _____

Advisor's Phone Number/Extension: _____

Name of Advisor's Assistant: _____

Preferred/main form of contact: _____

Assistant's Email Address: _____

Assistant's Phone Number/Extension: _____

LIFT Backup Legal Advisor

Name of Backup Advisor: _____

Preferred/main form of contact: _____

Backup Advisor's Email Address: _____

Backup Advisor's Phone Number/Extension: _____

Name of Backup Advisor's Assistant: _____

Preferred/main form of contact: _____

Assistant's Email Address: _____

Assistant's Phone Number/Extension: _____

LIFT Legal Specifics

Bills services on a flat fee or project basis? Yes No

Are there charges for phone consults? Yes No

Cost: _____

Are there charges for email consults? Yes No

Cost: _____

Monthly ongoing service or membership program? Yes No

Cost of membership program: _____

Service Used	Date Service Used	Cost of Service

Names of other people on Lawyer's team:

Name	Phone/Email	How they help

Frequency of Client Newsletter: _____

Frequency of Client emails: _____

Emergency Information

If lawyer is unavailable contact: _____

Replacement Lawyer: _____