



WSSFC 2022

**Practice Management Track –
Session 2**

Utilizing an Efficient Client Intake Process

Stanley Tate

About the Presenter...

Stanley Tate is a native of Chicago's south side obsessed with student loan law and using tech to scale his practice. His law firm, Tate Esq. LLC offers a variety of student loan debt solutions from eliminating defaults, negotiating settlements, defending lawsuits, lowering monthly payments, and pursuing discharges in bankruptcy.

CREATE AN EFFECTIVE CLIENT INTAKE PROCESS

*so you can close
more leads!*

**HEY, I'M TATE,
AND I'M
GOING TO
CUSS - A LOT.**



*Stanley
Tate*

I'M ALSO GOING TO DROP A BUNCH OF JEWELS



I run a law firm that helps people across the globe solve student loan issues.

FEATURED IN

THE WALL STREET JOURNAL.
The New York Times
IHUFFPOST

\$2.2
B

Managed in
student loan
debt.

27
K

People
helped
over 8+ years.

98
%

Net
promoting
score.

\$2
B

Projected
student
loan forgiveness.

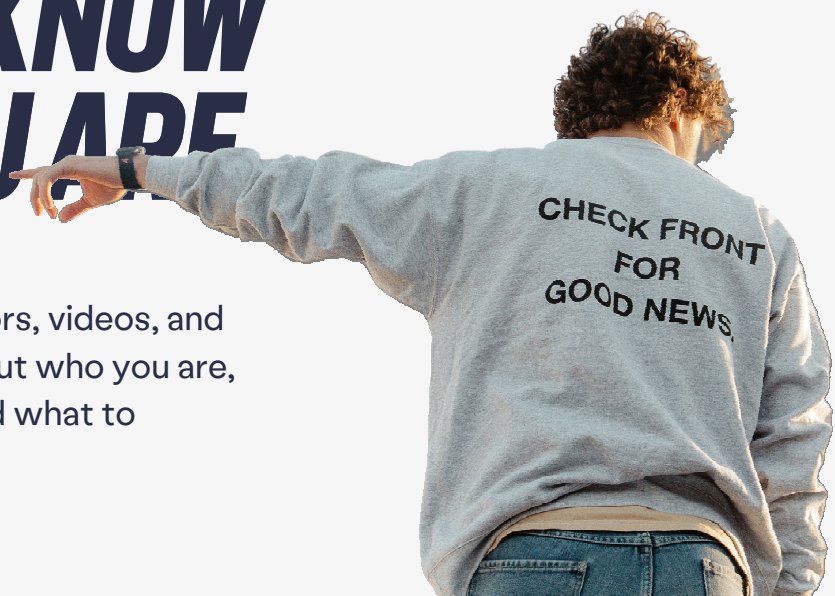
HOW I THINK ABOUT CLIENT INTAKE

5 COMPONENTS

- ***LET 'EM KNOW WHO YOU ARE***
- ***MAKE THINGS SIMPLE***
- ***REPEAT YOURSELF***
- ***EMOTIONS OVER FACTS***
- ***LOVE ON 'EM***

LET 'EM KNOW WHO YOU ARE

Use language, images, colors, videos, and so on to educate leads about who you are, how you communicate, and what to expect.



 **TATE LAW**

Services Blog About Store 

 **LET'S TALK**
Get a free 10min call


STUDENT LOAN HELP NO B.S. NO LIES

 Stanley Tate




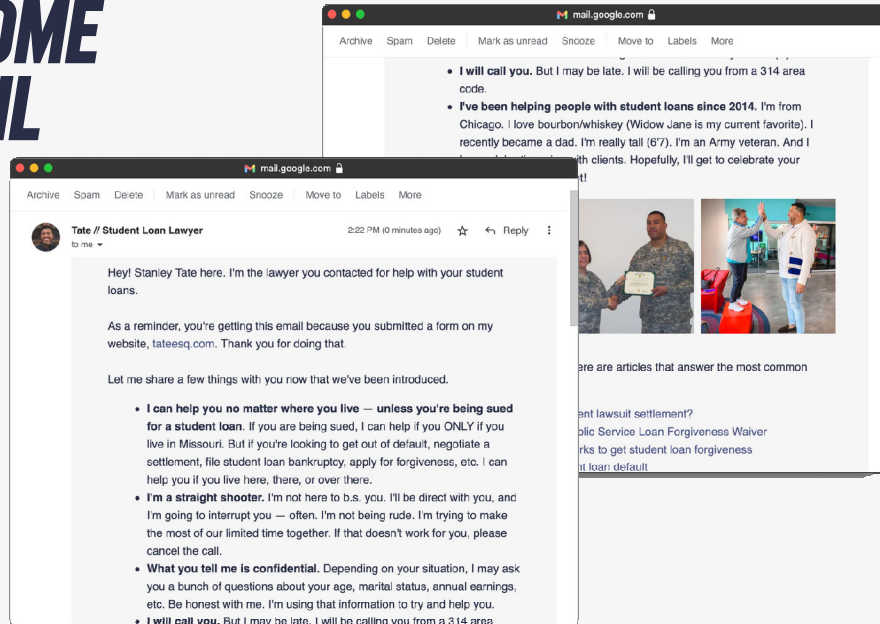
 **SITE PREVIEW**

ehglawfirm.com

 **ehg-law**

ABOUT PRACTICE AREAS BLOG FAQ **CONTACT** 404-771-6675





MAKE THINGS SIMPLE

REPEAT YOUR MESSAGE, PROG

But use different mediums.



EMOTIONS OVER FACTS

Hear me out. People buy products and services that resonate with them. Telling someone you can solve their legal problem doesn't always deliver the thud you think because that's not what they're truly seeking help for.



LOVE ON 'EM TO PREVENT BUYER'S REMORSE

Reaffirm their purchase. Send a personalized video, a handwritten note, or a swag box. Increase your availability within reason.



TECH STACK

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- Airtable
- Zapier
- G-Suite
- Flodesk
- Webmerge
- VideoAsk
- Clearscope
- Frase
- Jasper
- Ahrefs
- Law Clerk
- Dialpad

QUESTIONS