



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
jr*

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.

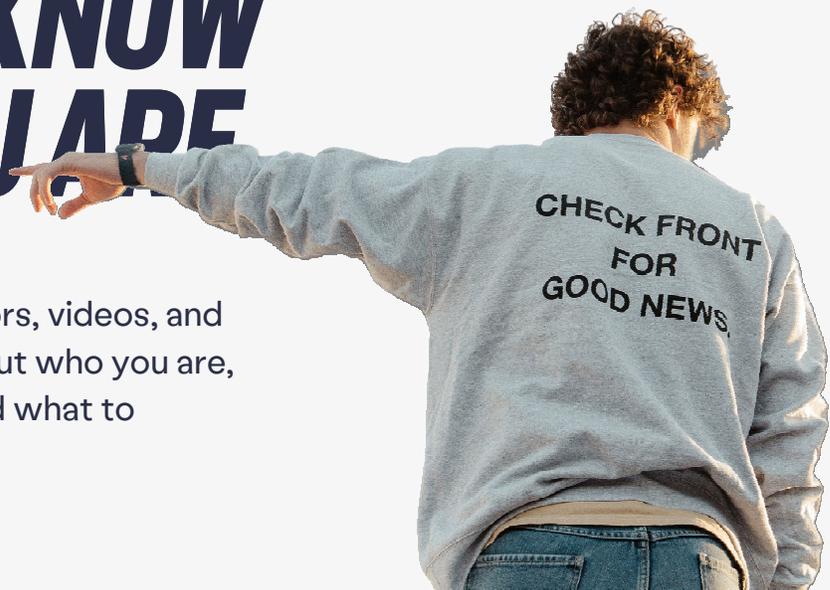
***HOW I THINK
ABOUT
CLIENT INTAKE***

***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

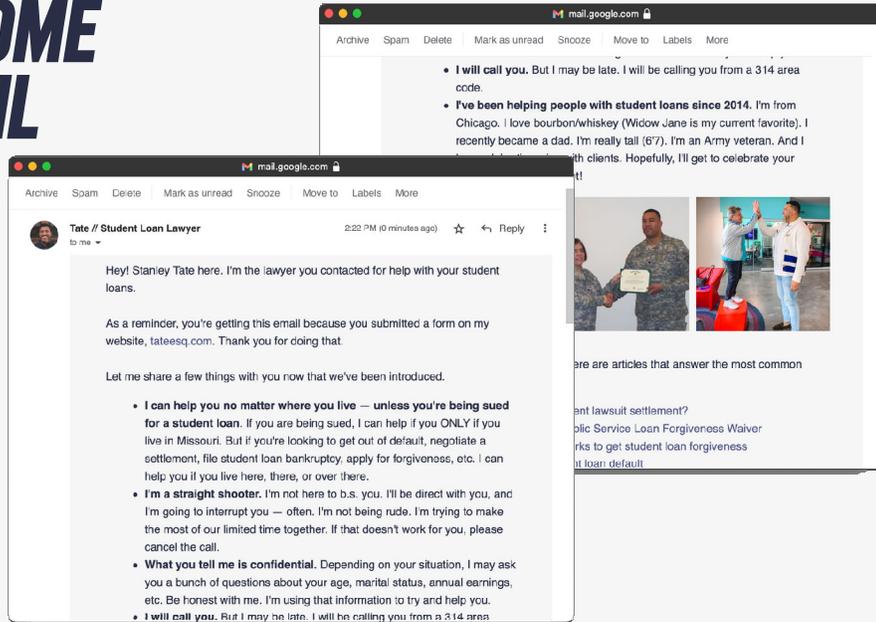
SITE PREVIEW

ehglawfirm.com

ehg-law

ABOUT PRACTICE AREAS BLOG FAQ CONTACT 404-771-6675

WELCOME EMAIL

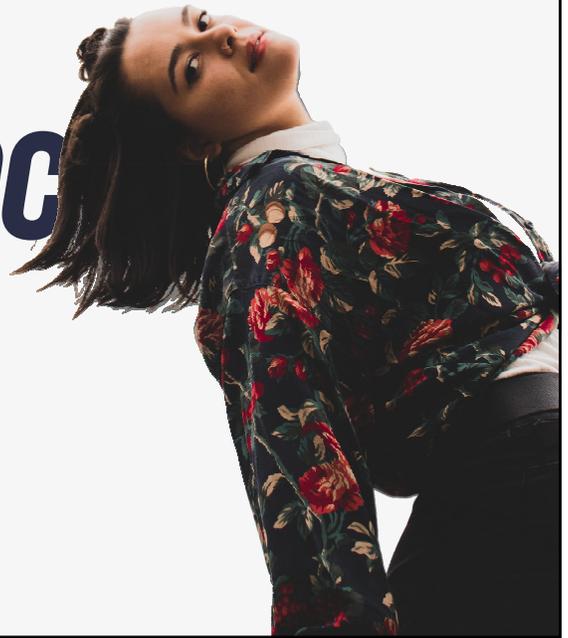


MAKE THINGS SIMPLE

Limit call-to-actions, keep forms short, explain your onboarding process,



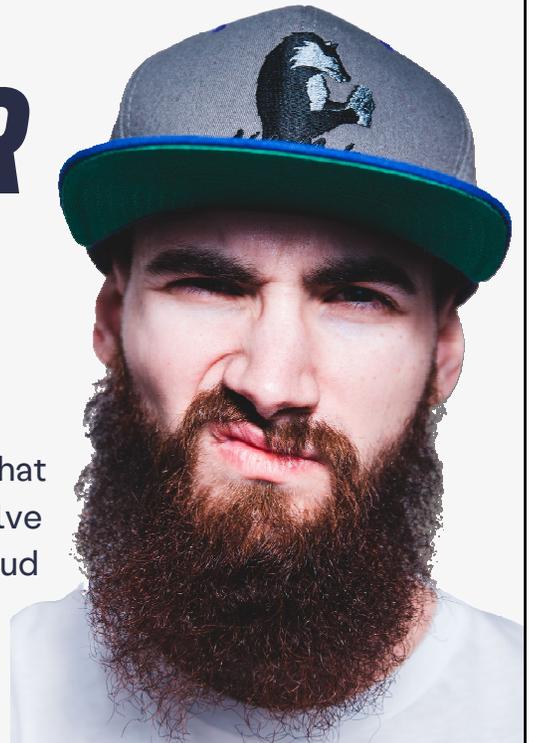
REPEAT YOUR MESSAGE, PROG



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

TECH STACK

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

**QUESTION
S**