First Referral to New Member Protocol Reminder

1) The caller has been instructed to call you first, so allow a few days to go by. However, they sometimes get confused, so if you haven’t heard from them in 3 days you may call them, unless we have noted No Calls, or contact me and I will check in to make sure they didn't lose your number, etc.

2) They have been told to give a 12-digit confirmation number and your staff person on phones should write it down. (That number is on the Confirmation Form that accompanies this page.) This is to let everyone know that the caller comes to you through LRIS and therefore should be subject to our protocols: if you are not available to speak with them when they first call, your promise to us, and their expectation, is that you will call them back within 3 business days; and

3) You will not charge for “the first brief consultation, up to 1/2 hour.” Even when the caller is close to you geographically, whether the first consultation is over the phone or in the office is up to the two of you to work out, according to convenience and preference. If you can’t agree – they want office, you want phone, or vice versa – you can send them back to us and we will re-refer.

4) You are expected to be as helpful as you can reasonably be in that first consultation - but we understand that sometimes a useful response to a caller can be completed in less than a half-hour - when a question really can be answered easily, or when you know that you will have to have a considerably longer conversation in order to get all of the facts that you need. In other words, you don't have to rush an unprofessional answer or fill up time with repetition, etc.

4) You are never being asked to give LRIS callers any better treatment or breaks on fees (with the exception of not charging for first 1/2 hour) than any of your other clients; AND

5) Keep in mind that a little patience and personal attention, including advice you feel you can responsibly give in a short conversation, is the best PR you can create. Even if the client doesn't retain you on the first call, they will say good things about you, and probably return when their next legal issue arises. Which is probably no different than your normal professional approach, but in our experience, we can attest that the attorneys who do best with LRIS and actually get retained cases and repeat customers are those who know that their time with the caller is an investment.

6) After your initial conversation or after a pre-consult conflict check, if you find for any reason this is not a case you can or care to take on, tell the client so, and tell them to call us back. They have already been told by us to do this, but may forget; and your agreement with us is to NOT refer them on to other peers, no matter how appropriate you think they might be. We have many attorneys signed up in most areas, so it is highly likely we can make a match with the next attorney, if it is a viable case to begin with. If for some reason you think the circumstances require that the person speak specifically to someone you think is THE expert, please contact me personally and discuss it with me before saying anything to the client. In the end, we will never stand in the way of a client receiving appropriate advice, in or out of our service, but must reserve the right to re-refer through LRIS unless it is clear to me that it would not serve the client.

Any questions? Always feel free to call or email me: 622-7523 ext 223 or philton@mainebar.org

Penny Hilton, Director, LRIS