SSF 2 | Automation in Your Practice: Sales, Marketing, Social Media, and Customer Service

Are you seeking more freedom? Have you considered having a partner or associate to obtain that freedom? There’s another solution. You do not have to be a tech nerds. There are software tools available. You do not need to know code.

Have you considered how much time you spend on asking your team member

After attending this panel, you will leave with a plan and ideas to execute to achieve freedom, less micromanaging, and improving customer service.

Moderator:
- Ronald Rohde, Owner, Ronald Rohde Law

Speakers:
- Jack Fan, Owner, Fan Law Office
- John Ting, Owner, Ting Law Group PC
BIOS

RON ROHDE

Ron Rohde is a Texan with a long history in North Texas real estate. With both parents as licensed real estate brokers and mortgage lenders, it was a natural evolution to advise clients on real estate transactions.

After attending Lake Dallas High School near Lake Lewisville, Ron attended Cornell University in New York. A few years in corporate America led him down to Florida where he graduated from the University of Miami School of Law. Knowing that he always wanted to return home to raise a family, he passed the Texas Bar and moved to Dallas.

Today, Ron focuses on all aspects of investment real estate. He advises clients on LLC formation, raising capital, loan document review, commercial leases, short-term rentals (Airbnb), and even evicting the most difficult non-paying tenants.

Outside of the office, Ron and his wife Bethany have two children. They live in East Dallas and enjoy being able to walk to all their favorite spots. He is also an avid motorsports fan and can often be found at the racetrack in his Honda S2000.

Find him at: https://ronaldrohdelaw.com/

JACK FAN

Jack Fan represents clients with estate planning (succession planning), probate, marital property agreements, corporate formations, and business transactions. Jack was recently appointed as a board member to the Legal Aid of Northwest, which provides access to legal representation to 114 counties in Texas.

The State Bar of Texas also recognized his work in the Dallas legal community by appointing him to the Standing Committee on Legal Services to the Poor. He also sits on the Property Standards Board for the City of Carrollton and is a board of director for the World Affairs Council of DFW and Sun Ray Education Foundation.

Jack graduated from the American University Washington College of Law and is licensed to practice law in Texas and New York.

Bar Leadership: • Committee Member, Standing Committee on Legal Services to the Poor - Civil Matters, State Bar of Texas • Chair of Elder Law Committee, Dallas Association of Young Lawyers • Board Member, Probate Section of the Collin County
JOHN TING

John Ting is a North Texas native who received his JD from The City University of New York School of Law. John’s immigration law experience derives from when he was an intern in the Immigration Department of Catholic Charities of the Archdiocese in Newark, New Jersey and the Immigration Clinic during law school. Since 2011, he moved back to his home state to start his own practice, guiding immigrants to live and work legally in America by suing the government for unreasonable delays and representing employers sponsor foreign-born professionals. John is known as the Immigration Problem Solver.™

His personal mission is to help lawyers be better professionals in the community by focusing on the business as an entrepreneur, than solely in the business as a lawyer. John started EsqMasterclass, which helps lawyers improve their practice, specifically to automate their sales process and systems and immigration law training for attorneys and staff.

In 2010, John was a recipient of an Equal Justice Award, which recognizes individuals who have made extraordinary contributions on behalf of underserved communities and causes. Over the years, John has accumulated more than 400 hours of pro bono legal services and is actively involved in the community. He has given back through the Dallas Volunteer Attorney Program and domestic survivor organizations (CHETNA and DAYA). John was awarded the 2016 Pro Bono of the Year with National Asian American Bar Association, 2015 Community Service Award, and 2014 Outstanding Member of the Year with Dallas Asian American Bar Association.

He has served on boards, including Legacy Preparatory Charter Academy, Southeast Dallas Chamber of Commerce, Dallas Association of Young Lawyers and its foundation. He currently serves on the board of DAYA in Houston.

Find him at: www.greencardguys.com
TECH SOFTWARE TOOLS

Disclaimer: These are only examples that could help your practice. Test it during a free trial.

Tip: Ask yourself what you are solving before you sign up. Some software tools have several features that overlap to solve more than one problem.

OVERALL:

Automatically send information by connecting different software tools to each other: such as your CRM to your e-newsletter software.

zapier.com
integromat.com

ADMIN:

Virtual Receptionist (Intake Specialist): AnswerConnect, OfficeSense, Smith.Ai, but none as good as someone you can train like a dedicated VA.

VOIP: Google Voice if starting out. Can answer calls from app, but cannot transfer calls. If your hire VA, I recommend RingCentral.com because can transfer calls to another person without adding user & can answer via computer
**Appointment Calendar:** Calendly.com
Why? user friendly, ability to hide calendars from public, automatically sends reminder and follow up emails.

**CRM:** Camplegal (forms & CRM), 17hats (CRM)

**Project Management:** ClickUp, Monday, Basecamp

**Immigration Forms only:** Docketwise (has limited features for intake)

**MARKETING:**

**Campaign marketing:** Getresponse.com, Drip.com, Activecampaign.com, Lawmatics.com, Lawcus.com

**Create images/flyers:** Canva.com (Free plan available. Can upgrade to ~$100 per year)

**Upload same post to multiple social media platforms:** Buffer or Hootsuite.com

**Website chatbox:**
Yotengo.bot, Smith.Ai, Tidio.com, Apexchat.com

**MISCELLANEOUS:**

**Video conference platforms other than zoom:**
Dialpad.com (can record automatically) or Whereby.com (both do not require app, opens on browser) Free version available

**Video recording for sales:** Dubb.com (preferred because it has playlists), Vidyard.com Free version available

**Video recording for training:** Loom.com (free for 5 minutes or less)

**Youtube keyword search and management:** Tubebuddy.com or Vidiq.com

**Thank you cards (automated):** handwrytten.com

**HelpDesk / Support Ticket / FAQ:**
**Purpose:** This is for your clients to search on your website, so they do not have to call you for every question.

Freshdesk.com
Zendesk.com
Intercom.com
Kartra.com

**Online Course & Membership Sites:**
Kajabi.com
Kartra.com
GoHighLevel.com
SESSION NAME:

Automation in your Practice

“Build more time back for yourself.”
Speakers

• Jack Fan, Owner, Fan Law Office
• John Ting, Owner, Ting Law Group PC

Moderator

• Ronald Rohde, Owner, Ronald Rohde Law
HOW DOES AUTOMATION SOLVE?

- SALES
- MARKETING
- SOCIAL MEDIA
- CUSTOMER SERVICE
HOW OFTEN SHOULD I REEVALUATE?

**Holistic approach**

- Data: summarize key metrics from the past year
- Prior goals: what did you want to achieve?
- New Goals: what do you want to?
- What tools or changes will help you achieve that goal?
WHAT IS THE PERSISTENT PROBLEM?

- What do you want to accomplish (the **outcome** for your client)?
- Is there a more **efficient** way?
- Identify roadblocks (**bottlenecks**)
- **Lifecycle**: How long do you want the case to be in a certain lifecycle stage?
- Has your client been **updated** (timely)?
SALES

● ABS: Always be selling

● Establish processes for your sales process

● Whether you like it or not, every interaction is a sales opportunity, the trick is to not make it feel like a sales pitch to your clients/referral sources.

● Finetune Intake process: Don’t Wait for Leads to Call
MARKETING

- Marketing is NOT brand awareness
- It is NOT measuring likes, views, impressions, or even “engagement”
- Marketing must be delivering a targeted message to your target audience with a goal of causing them to take action.
- Marketing must be measurable and tracked.
SOCIAL MEDIA

- Choose 2-3 platforms and commit to them every day or at least every week.
- Who is your ideal client? Where do they spend their time?
- Create content that can be recycled on multiple platforms with different titles/comment descriptions.
TAKEAWAYS

● Mindset shift: Overcoming “it’s too late”

● Marketing and Sales are related, but very different. Understanding small pieces of your own marketing and sales process will be incredibly useful towards controlling and improving the outcomes.

● This is 50% of the challenge. Master these and every other problem can be solved.
HOW TO CONTACT US

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