

KEEPING YOUR PRACTICE ON TRACK HOW TO COMMUNICATE WITH CLIENTS 101: A REVIEW OF THE BASICS

Sarah J. Read, Presenter

All relationships are built through communication. When, how, why, and what you communicate is the key to a successful practice. Yet the number one client complaint in most jurisdictions is poor communication. Good communication generally results in a more enjoyable day to day practice, minimizes your risk of complaints, and encourages return business or referrals from your clients. This is because good communication generally leads to clients who trust you and are loyal to you. As Micah Solomon noted in the April 2011 issue of the Wisconsin Lawyer, “Loyal clients can provide lawyers with a strategic, sustainable advantage.” In this session we will review some of the factors that help lawyers and clients work effectively together.

Definitions:

- *Communication*: The transmittal of thoughts, messages, ideas, or information in a way that they are received and understood.
- *Trust*: Confident reliance on the integrity and ability of another person.
- *Advisor*: One who offers ideas, guidance, or opinions about a course of action.
- *Advocate*: One who pleads for another.

Key Rules:

The rules of professional conduct and accompanying notes provide considerable guidance on issues that arise when communicating with clients. The Preamble to the rules should be carefully reviewed, as should the following:

- 4-1.0 Definitions. (See definition of “informed consent” in subsection (e) and “writing” in subsection (n)).
- 4-1.1 Competence.
- 4-1.2. Scope of Representation.
- 4-1.3 Diligence.
- 4-1.4. Communication.
- 4-1.5. Fees.
- 4-1.6. Confidentiality of Information.
- 4-1.7. Conflict of Interest: Current Clients.
- 4-1.13. Organization as a Client.
- 4-1.14. Client with Diminished Capacity
- 4-1.16. Declining or Terminating Representation
- 4-1.18. Duties to Prospective Client.
- 4-2.1. Advisor.
- 4-7.1. Communication Concerning A Lawyer’s Services.

How Do You Communicate?

- Words (Word
 - Choice, Sequence, Delivery)
 - Tone
 - Body Language
 - Appearance
 - Writing
 - Environment
 - Interaction
- } What do **YOU** Communicate?

3 Not So Simple Rules:

- Know Your Message
- Know Your Audience
- Speak So Your Audience Can Listen and Understand

At all stages of the client relationship -- from marketing through intake, the actual representation, closing the file, and follow-through -- your primary audience is the client. You also have a secondary audience which includes the disciplinary counsel. Law is a demanding profession physically, emotionally and intellectually. To communicate effectively and meet professional standards, you also need to both know and take care of yourself. There are a number of office procedures and systems, many of them quite simple, that you can implement to help you communicate, relieve stress, and increase productivity.

'Message Loop' Checklist:

- When you return from court you put your files _____
- When you return from out of the office you routinely _____
- When you pick up a message you _____
- When your assistant takes a message he or she _____
- My policy for returning calls is _____
- Forms that help me communicate include _____
- _____
- I review files by _____
- Other procedures that help me keep in touch with clients are: _____
- _____

Rule 1. Know Your Message:

The strongest lawyer-client relationships are built on trust. Trust requires communication that is clear, consistent, and coherent.

Marketing:

First impressions begin with marketing, broadly defined here as how you present yourself to potential clients. What do your marketing efforts say about you and your practice, either explicitly or implicitly? Does your marketing message match with your actual practice? Does it address the needs and interests of your desired client base? How does it fit with the way you train your staff?

Some lawyers present messages like: “We win.” “We will do anything to win.” “Hire us, we bring in the money.” Consider the implicit promises being made in this type of marketing and what it means for what the client expects from the lawyer. Consider what might happen in the lawyer-client relationship when those expectations are not met.

Other lawyers convey messages like: “I’ll take everything and anything.” “Just pay me now and I’ll get started.” Further on in the relationship the client is likely to doubt whether he or she is getting their money’s worth.

Some lawyers reach out to clients with messages like: “We care about you.” “You can trust us to work with you.” “We know how to try cases.” “We are experts in matters like yours.” These types of messages generally provide a positive foundation for the future attorney-client relationship when these messages are aligned with the lawyer’s actual practice.

An adequate web presence (which can be very simple and low cost) and an e-mail address that is tied to your office indicates you are at least competent with technology. Technological competence is increasingly important to clients.

Intake:

A client who comes in to meet with you is often thinking of the following questions: Can this attorney help me? Does this attorney like me? Can I trust this attorney to do right by me? Even before a potential client comes to your office you can begin subtly communicating messages like “we care”, or “we handle things professionally”, by providing such things as driving and parking directions, firm information, and a “prospective client information form” to be filled out and brought to the office. Providing clients with forms to fill out also communicates that “clients have responsibilities in this relationship.”

When a client comes to meet with you the first thing the client will see is your office, first the outside and then the inside. What impression does it convey? An office can appear professional, competent, organized, and even comforting, or it can be messy, chaotic, self-indulgent, and even threatening, or somewhere in between. Who greets the client and how? Busy staff can immediately confirm to the client that the office is glad to see the client and give the client something to do, or can instead convey that the client is interrupting the ‘really important’ work

of typing documents or fielding calls. You need to train your staff to communicate the messages you want your clients to receive. Also consider what your office communicates about confidentiality. Are documents, files or computer screens visible to a waiting client? Are conversations of others audible?

Once you have the chance to meet with the client, there are several things you as a lawyer will want to do, including

- Assessing the client and matter,
- Determining whether the matter is one you can and are willing to handle,
- Finding out if there are any conflicts (potential or actual) with existing clients (assuming these haven't been pre-screened), and
- Discussing what it will cost and whether or how the client will pay.

It can be hard to balance these tasks with building a relationship and meeting the client's desire to talk and get started right away. One way to strike this balance is to be the client's "guide to the process". You start by focusing on the client, for example, you may say something like: "It's a pleasure to meet you, I really appreciate you coming in. I know you are anxious to tell your story and get started. Unfortunately there are some administrative hoops we need to jump through for your protection and mine." Then you can share information about your professional obligations: "Under the rules of our profession we owe a duty of loyalty to our clients, and even at times to those who don't become clients, and so I need to ask a few questions to make sure that our talking would not create a conflict for a current client, or that there is no other factor present that would make it difficult for me to fully represent you." Also, if the client is just fee shopping, or not serious about hiring you, it is better to find that out before creating a conflict that would preclude a future representation.

Note that under Rule 4-1.18(c), you are precluded from representing "a client with interests materially adverse to those of a prospective client in the same or a substantially related matter" if you receive "significantly harmful" information from the prospective client. A recent ethics opinion in Wisconsin reviewed what types of information would be "significantly harmful". WI State Bar Professional Ethics Committee Formal Opinion EF-10-03. This includes

- Sensitive or privileged info that would not be received in the ordinary course of due diligence (for example, if a client shared a personal journal in child custody case),
- Information that has long-term significance to matter such as motives, strategies or analysis of potential weaknesses,
- Information that could have substantial impact on settlement proposals and trial strategy (such as premature possession of financial info or a settlement range),
- Personal thoughts and impressions about the facts of a case, or
- Information that is extensive, or of significant use (such as impeachment material).

Information that generally can be obtained without triggering the "significantly harmful information" clause would include

- Information needed for your conflicts check,
- The type of matter including sufficient information to identify whether it is within the lawyer's capability,

- Ability to pay, and
- Past representations.

Depending on your practice you might want to ask the client not to share anything more than very basic information with you unless or until you decide to take on the matter and explain that if you do not, you may take on matters or clients directly opposing the client. You can also obtain advanced, written and informed consent to waive future conflicts, and the ethics opinion cited above contains very specific advice for how to go about doing that. These kinds of messages though will not sound very friendly and if the client is not sophisticated may well be misunderstood. So they need to be delivered with care, in as friendly a way as possible. Even so, the client's trust in your loyalty will be strained, and if you do end up working together you will need to put in some extra time building a relationship with that client.

Once you have determined that you and the client can work together, you will want to define the scope and objectives of the representation, discuss the client's expectations, set some boundaries, and confirm the engagement. You want to make sure that the client understands your role as a lawyer – that you are not a guarantor, or a psychologist. You want to make sure the client has realistic expectations about time, potential outcomes, and your availability. If you do not want to be called on your cell-phone at midnight, say so! Walking the client through a set of forms that you mark up together, helps to communicate that you are a professional, there to work *with* the client. This can also be an effective way to educate the client on how to work with you. For practices with high volume matters, you might have a simple one page form that doubles as the client's receipt for payment. For more complex matters you may have several forms, each of them several pages long. If you send clients your forms in advance of the initial interview and invite the client to look them over so that you can answer any questions when they come in, or if you review the forms at the interview and then give the client a day or two to look them over before signing, you are more likely to win the client's trust than if you pull the forms out after you have talked with the client and ask the client to sign.

Don't be shy about discussing fees. You want to communicate that although you are there to help, your service is valuable and you collect fees. Regardless of your practice you should make it clear to a new client that there is no representation unless and engagement letter is signed and an initial fee is received. This helps reinforce both the message that you expect to be paid and "its your job as a client to work with me." You can of course decide to represent a client on a pro bono basis. That should be a decision though that you make intentionally, and you should still discuss fees so that the client is aware of the value of your time, and the benefit that is being received. You can also use the fee discussion to define different levels of service, for example, if the client calls repeatedly or you need to spend extra time obtaining documents from an uncooperative client, or the client wants calls returned within three hours, you may want to consider setting charges that cover such extra work, and inform your client of when they will apply. This communicates the message that "you determine the level of service – more service equals more costs, or you can choose to keep costs down".

Put your agreements in writing! This again communicates you are a professional and that this is an important relationship. Your agreements should be written in plain English and be easy for the client to read and understand. This communicates that you are not going to take unfair advantage of the client. Your fee agreement or engagement letter should

- define who client is,
- state how the fee will be calculated and when and how it might change,
- state what expenses will be charged (specifically identify those you want to recover; if you do not charge for things others might charge like copying costs, tell the client those are “included in the fee.” This helps the client know what additional value you are providing),
- clearly identify the matter covered and set out any limits on the scope of representation,
- explain how and when the attorney- client relationship can be terminated,
- state whether any conflicts were identified and resolved, and
- address how you will communicate.

With regard to communication, it is a good idea to include a paragraph on the use of e-mail, and gain the client’s permission to use that as a form of contact. Ask the client whether the e-mail is private. You do not, for example, want to communicate with a client through a family e-mail address that a spouse also has access to, or through an employment address if the employer has access and the e-mails could be subpoenaed. If you are representing a corporate client, or other client with multiple representatives, you can avoid miscommunication down the road by identifying a key representative for communication and any procedures needed to finalize decisions. If you may need co-counsel, the client’s permission to hire a specific co-counsel and pay related fees should also be addressed, whether in the initial engagement letter or a subsequent letter when the co-counsel comes on board.

If you determine that you don’t want to work with the client, or the client fails to return your engagement letter and fee in a timely way, you should send a “nonengagement letter”. This is a letter that makes it clear that you are not representing the client. Sample forms can be found on the websites provided in the “Further Reading” list which is a separate handout.

Before the client leaves, introduce your staff. Let the client know that you have staff for their benefit and that you work as a team. Let the client know that although you will be the only one providing legal advice, the staff can help in many ways, including sending copies, taking down questions, returning calls when you are not available, and helping to connect you and the client when needed. If the client understands that you work as a team, they will be less likely to demand your personal attention for minor matters during the representation.

Representation:

“Earning client loyalty isn’t difficult, but it does require consistently providing clients with a great experience.” Micah Solomon, Wisconsin Lawyer, April 2011. Who defines what is a great experience? – the client does! This is one reason to ask about your clients’ expectations upfront. Clients will generally assume you have the necessary technical skills, although most will not fully understand what you do or how well you do it. In addition to whether or not a matter has the client’s preferred outcome, clients are likely to draw conclusions about the work you do based on how you communicate with them.

The following practices all help you communicate care to your client:

- *Check-In.* On anything other than very small matters it is a good idea to call a few days after an agreement is signed just to check-in, review the expected time-line, and answer any questions that may have come up.

- *Observe Common Courtesies.* Say thank-you, hello and good-bye. Where appropriate express sympathy, congratulations, and otherwise acknowledge personal events in your clients' lives that come to your attention.
- *Be Responsive.* Return telephone calls and respond to e-mails promptly.
- *Respect Your Client's Time.* When scheduling, plan adequate time between appointments so your client is not waiting. Schedule enough time for an appointment so the client is not unduly rushed. Call ahead if you are delayed. Apologize when you are late.

The following practices all help you communicate respect and reassure the client that you are working in their best interests:

- *Keep the Client Informed.* Provide the client with copies of documents, give them a timeline of the process, and let them know when an action has been taken or a date changes. Calendar and provide regular status reports. If there is bad news to deliver, it should be delivered as quickly as possible. Better that the client hears it from you first.
- *Stay Organized.* Especially for disorganized clients, a lawyer's ability to quickly retrieve information, whether a document or an e-mail, is of very high value. Such retrieval communicates professionalism, efficiency, and sound knowledge of the client's file.
- *Collaborate and Consult.* Give the client choices when possible and save the client money when you can. This applies to decisions like choice of expert, addition of co-counsel, timing of research, organizing documents, value based billing, and many other aspects of the relationship. When alternative options for proceeding are present they should be reviewed with the client, along with the associated risks and benefits. Whether or not to accept a settlement offer is also a choice for the client, although again the benefits and risks of accepting or not accepting should be explored. Especially when working with corporate clients, it is a good ideal to define roles, responsibilities and time-lines for decision-making, using standard project management tools. This ensures adequate in-house review. If the client expands your role, be sure to amend your engagement letter.
- *Underpromise and Overdeliver.* Do not make specific promises related to things that are not under your control. If make a promise as to timing or action, keep it. When you keep it, inform your client. Start out your cover letter or e-mail with the phrase "As promised . . ."

The following practices help to communicate to your client that your fees are fair:

- *Send Bills Regularly.* Regular bills help inform the client of what work is being done and the value. If they have concerns about fees, it is better for them to surface early in the relationship, when less time is invested. Sending regular bills also communicates that you expect to be paid for your work. Consistent bills are less likely to disrupt your client's budget and are more likely to get paid. If the client thinks you are sending out bills "just when you need money," as opposed to in the ordinary course of business, they are more likely to question the charges.
- *If Payment Is Not Made, Request Payment.* If you let a client ignore your bills, you are communicating that you do not really value your services either, and that payment is negotiable.
- *Show Value Given.* If you write off time, give your client a discount, apply a fee cap, charge lower rates for routine work not delegated to an associate or staff, or otherwise reduce a client's bill over straight time and expenses, show that on the bill as a courtesy or other write-

off. If you have a flat fee that covers certain expenses, show the expenses and mark them as “included in the fee”. This assures the client that you are treating them fairly.

- *Offer to Discuss Alternative Billing, Budgeting Plans, and Other Arrangements.* According to a post on the ABA’s Legal Rebels Blog, in the last two years the number of law departments using non-hourly fee structures has increased from 10% to 40%. Even if a client chooses to continue to use hourly billing, they will appreciate your efforts to help them manage costs and budgets.

Finally, for both the client’s benefit, and your own you should document key decisions made, particularly when the client does not follow your advice. Memories have a way of fading and changing over time, and documentation can help your client recall your good advice should a conflict later occur.

Closing:

Having a procedure for formally closing a file in each matter gives you both an opportunity to communicate with the client in a way that builds future loyalty, and also limits the potential for future conflicts. If the file is closed and you are not working with the client on any other matter, the client becomes a “former client” for conflicts purposes, and you will not have an ongoing duty to advise the client. Closing the file also gives you the opportunity to thank the client, ask for input, and also for future referrals. A good closing letter

- advises the client that the matter is closed,
- thanks the client for the opportunity to work together,
- notes whether the attorney is working on any other matters for the client or whether the closing of the file also ends the current attorney client relationship,
- if the representation was a limited scope representation or there are other open issues, advises on further steps, including advice when appropriate to seek further counsel,
- offers the client an opportunity to pick up the file or obtain copies of documents in the file (and if the client does so, have the client sign a receipt that they received the file and keep a copy),
- invites feedback from the client (enclosing a survey is a good way to do this),
- reminds the client of your policies on file retention or destruction, and
- where appropriate, states your interest in serving the client again should the need arise in the future and also mentions the possibility of referrals. (If this kind of statement is included in the letter consider enclosing two or more of your business cards.)

You can send the client the final bill with the letter, or you can separately send the bill and then send the closing letter upon receipt of payment. In either case, once you send the final bill, do not send a subsequent bill seeking to recover minor expenses that were not previously included or additional hours one of your partners worked but did not timely submit to your billing system. Clients hate that and it makes you look disorganized and more concerned with minor amounts of money than with the relationship. Do your homework and send out an accurate bill in the first instance.

Following Up:

Just because you have closed a file doesn't mean you should forget about the client. If the client does return an evaluation, call, say thank you, and discuss the feedback with them. The client is more likely to think of you when new needs arise (either for the client or the client's family and friends) if you periodically send holiday cards, newspaper or other articles relating to the client's area of interest, or something like a "legal health check-up form". If you worked with the client on a significant transaction or case, calendar a call in three to six months, just to check-in on how the client is doing.

A Word About Forms:

Every law office should have the following forms to help it in communicating with clients. Forms like these can be easily customized and will help you stay in touch, obtain information you need, and reduce the administrative burdens of practice. These forms should be printed on the office letterhead or marked with a graphic tied to the lawyer's office:

- A "thank you for contacting our office" scheduling form,
- An engagement letter or fee agreement(s),
- A "non-engagement" letter,
- A file closing letter, and
- A file receipt form.

Additional forms that are useful are

- A set of frequently asked questions (with answers);
- Either a "working with us summary" of policies or procedures or at least a description of how and when to communicate with the law office,
- A form "status" report,
- A client satisfaction survey form, and
- Illustrative timelines, flow charts, or checklists relating to matters typically handled by the firm.

These types of forms are not hard to create and you do not need to work from scratch. The LPM section of The Missouri Bar website has forms you can begin with. Other examples can be found on-line and in many publications. You will need to regularly review and update your forms. If there are several people in your office, I recommend scheduling a once a year review and also keeping a notebook with a set of blank forms so that you and others in the office can make notes on them as you identify possible improvements over the course of the year. This will help you steadily improve your forms.

Rule 2. Know Your Audience:

You get to know your client by active listening, asking open-ended questions, and by careful observation. An "open-ended" question is one that can't be answered simply with a yes, no or other single word. Listening will also help you build a bond with your client as it meets basic

human needs for attention and acceptance. With good listening you will obtain a lot of information on what your clients value, what they expect, how they feel, and what they do and don't understand. You will find out whether they think literally or symbolically, analytically or intuitively. You will hear clues that let you evaluate how well you might work with you: For example, are they very aggressive or dramatic in their presentation? How do they answer questions? Do they ramble, change the topic, sit passively, or try to sell you on the merits of the case or the benefits of working with them? Can they articulate goals and objectives for the representation? Are they consistent? Are there subjects, like fees, that they are reluctant to discuss? As you take note of these things reflect on how comfortable you will be in working with the client.

Your own assumptions and biases, expectations, training, and experience, can interfere with your ability to listen. Active listening requires a focus on the client and involves cognitive skills like perceiving, discerning, analyzing, empathizing, reflecting, synthesizing and integrating. You cannot effectively listen to your client if you are focusing on what you want to say and just waiting for the gap that allows you to talk. A form that allows you to record both factual information that is shared as well as observations on the factors noted above can help you listen. Reflecting back what you heard, and inviting further comment will often lead to new information. (Example: "So you were very upset, and felt betrayed due to the former relationship. Do you want to say more about that?") It is worth the effort to listen well. In general, when clients feel heard they become less emotional, more receptive to new ideas and information, and better able to collaborate with you. They are also likely to understand that you care. Listening helps you build a bond with your client as it meets basic human needs for attention and acceptance.

In order to feel heard, clients need your full and undivided attention. This means limiting interruptions, like phone calls, during your meeting. If an interruption does occur – apologize! If you know one might occur, alert client in advance, and express regret. For example, you might say - "I'm very sorry, one of my clients is having a bit of an emergency and I may need to step out and take a call. I didn't want to keep you waiting or force you to reschedule when we've had this meeting on the calendar for some time. If it does happen, I will keep it brief, and I wanted you to know that this is an exception to our policy of limiting interruptions when meeting with our clients." Then apologize if the interruption does occur. This helps to reassure the client that you do care about your time with that client.

In our diverse populations, it can be easy to misread a client. Expectations for working with a professional, and even aspects of communication like eye contact and appropriate word choice differs by culture, generation, and the individual. For example, there are 4 different generations in the market for legal services: These include the "Silent" or "Greatest" Generation – born 1945 or before; "Baby Boomers" born 1946-1964; "Gen X" born 1965-1980, and "Millennials" or "Gen Y", born 1981-1999. Each of these generations as a group has a very different sense of both privacy and equality in a relationship, vary in their acceptance of technology (resist to expect), and different levels of trust in experts. Individuals do not always match their generational or other cohort though. You won't know what your client values or expects unless you ask, and listen to the response. Conversely, you can't assume your clients will know best how to work with you, unless you share your own expectations with them.

Rule 3. Speak So Your Audience Can Listen and Understand:

If a client is anxious, and wanting to talk or have a question answered, the client is not listening to you. For this reason it is a good idea to check-in with a client at the beginning of a meeting. For example you might, after greeting them, say something like “I jotted down some notes of things we might cover, and we can start that way or you may have a question or thought you want to share right away – how would you like to begin?”

As noted above, when a client feels heard, it generally calms emotions and increases receptivity to new ideas or information. One way to let the client know you are listening is to reflect back or summarize what you have heard and ask the client, “am I following that o.k.? Do you want to say more?” Even if the client is rambling, avoid responses like “None of that is relevant – just focus on . . .” Instead you can help the client focus with phrases like “ Is it ok if I ask a clarifying question there?” I’m not sure I’m following, could you review . . .” “I really want to understand, were you . . .?”

Your client’s own biases, assumptions, values, and expectations will affect how well they listen to you. If client doesn’t understand, or is resistant, try to figure out why. Avoid phrases like, “I already told you that . . .” or “It’s pretty easy, I’m not sure why you don’t understand” or “You aren’t listening.” Ask instead about what concerns, fears, or questions they have they have. Ask them to explain what they think you have said. Many lawyers are auditory listeners who pick up spoken information well, and are also good readers. Many clients are not. Time-lines, charts, and other graphics can help you communicate to clients who are more visually oriented. Some clients are kinesthetic processors and need to move around to clearly express themselves or to retain information. Consider asking a client who is having trouble verbalizing to draw a picture or a chart related to an event or an expectation and to discuss it with you.

Sometimes you have to adjust a client’s expectations. Although you want to correct a false expectation as soon as you can, direct disagreement can undermine the client’s trust in you. One way to introduce information different from the clients expectations and continue to build a relationship is by referring to a “neutral” source. For example, let’s imagine a prospective client comes in to see you and says something like “I want to make John as miserable as possible, and I heard you are just the kind of lawyer who can make that happen.” You can reframe this in a way that keeps the conversation going, while also letting the client know that it is not your job to simply harass other people by referring to language in the Preamble to the Rules of Professional Conduct (see paragraph 5). For example, you might say (referring to a copy), “It sounds like you are pretty upset. We pride ourselves here on being loyal to our clients and on our knowledge of the law. We also practice professionally, according to the rules of our profession. Here in Missouri, that includes the being professional and civil, and using procedures “only for legitimate purposes and not to intimidate or harass others.” Let’s talk further about how we might be able to help you.”

4. Taking Care of Yourself:

Practicing law can be very stressful. This stress is reflected in a range of statistics. Lawyers are 6 times more likely to commit suicide than the general population, first among 105 professions surveyed for clinical depression, and suffer from drug or alcohol addiction at a higher rate (5 to

8% higher) than general population. (These are recent statistics cited in the CBA Record, January 2011). When you are anxious and stressed, it can be hard to care for others and give them the attention they seek. When thinking about how you communicate with clients, think about the following:

- Taking the right clients and matters limits anxiety and stress,
- Advance planning limits anxiety and stress,
- Forms and systems limit anxiety and stress,
- Protecting your own time and interests limits anxiety and stress, and
- Assessing what is and isn't working and making changes limits anxiety and stress.

In assessing what is and isn't working, think about which types of communication at which points in the relationship cause you the most stress and anxiety. Are there clients you just don't like? You have the right to decline representation and, in many instances, the right to end the attorney/client relationship when it is not working. Are certain clients abusive to you or your staff? You have the right to ask for courtesy and respect. Are clients making unreasonable demands? You have the right to tell the client "No." Are clients "taking advantage of you" and failing to pay you on time? You have the right to ask for payment. Consider what behaviors you are ignoring. Then plan how to exercise that associated "right" when communicating with your clients.

Often lawyers put off making changes that would improve communication and lessen stress because implementing a new system or set of forms just seems overwhelming. All progress is, however, incremental. Even small steps can improve your practice in significant ways. Start by making a list of things you might want to change. Then choose one item and list the steps you will need to complete it. The next step is gathering the materials you need to complete that task. Calendar a working time and work through the task you have chosen. If this is a new form or procedure, implement it. Make sure you acknowledge and celebrate progress as your practice improves.

If you find yourself avoiding a client's calls; if your stomach aches and your head hurts when you think about the case; if you are putting off work that needs to be done, yet you just can't bring yourself to terminate the relationship or talk the problems through with the client, you need to get someone else involved. This could be a partner, a coach, a support group, MOLAP, a friend – *someone* who can help you move forward *before* a complaint is made. If you are in this situation, call someone today.