

TAPER

TWICE-ANNUAL PRACTICE ENHANCEMENT RETREAT

ELEVATE

Strides Toward Greatness



TAPER ATLANTA VIRTUAL

APRIL 26-28, 2023

TAPER ATLANTA VIRTUAL AGENDA
APRIL 2023

Wednesday, April 26

Thursday, April 27

Friday, April 28

8:00 AM
-
8:50 AM

FIRM INTRODUCTIONS

WORKSHOP:
ELEVATE YOUR PROFITS

8:50 AM - 9:00 AM | BREAK

9:00 AM
-
10:00 AM

KEYNOTE: ELEVATE YOUR MIND

REVENUE FOCUSER TO THE RESCUE:
MEASURING GOALS

10:00 AM - 10:15 AM | BREAK

10:15 AM
-
11:30 AM

THE TIME IS NOW!
TIME TRACKING & KPIS

USE YOUR RESOURCES!
DRAFTING IN 2023.

10:15 AM
-
11:30 AM

DO YOU TRUST YOUR FUNDING?
STREAMLINING THE PROCESS.

FOCUS AND SUCCESS WITH RMS

11:30 AM - 1:00 PM | LUNCH SPONSOR

1:00 PM
-
2:15 PM

MEDICAID: LEARN THE RULES.
REAP THE REWARDS.

1:00 PM
-
2:15 PM

WHAT ARE "THEY"
SAYING ABOUT YOU?

2:15 PM - 2:30 PM | BREAK

2:30 PM
-
3:45 PM

PRODUCT UPDATE:
GUIDR, CCS & ACTIONSTEP

WHY DAY.
BUILDING A FIRM
THAT ROARS IN THE 20'S

2:30 PM
-
3:45 PM

PROVE YOUR VALUE WITH A
MAINTENANCE PROGRAM

3:45 PM - 4:00 PM | BREAK

4:00 PM
-
5:15 PM

LEAVE A DAZZLING IMPRESSION.
ENHANCING CLIENT EXPERIENCE

FIRM RETREATS:
(SELF-LED)
RISING ABOVE CHALLENGES

Save
THE
Date

OCTOBER 2023



LawyersWithPurpose.com/TAPER



WEDNESDAY, APRIL 26, 2023**Keynote: Elevate Your Mind**

Shawn Harper | Bridge Builders International

April 26 | 8:45 am-10:00 am

Without losses, there are no wins and without adversity, nothing to overcome. Although many embark on the road to achieving their dreams, in the face of fear and doubt, most stray from the path. Few ever rise to their highest potential.

Shawn Harper, knew what it was like to come in last. From an early age, the odds were stacked against him. He struggled both financially and academically, facing a multitude of obstacles, he longed to find a sense of purpose. Doubted by his teachers, peers, and coaches, he was deemed “not good enough”. By all accounts, he should have lost but in his darkest hour he chose to fight - and won. His story is one of inspiration, grit, and determination - a tale of the underdog fighting his way to the NFL. He would go on to play for the Colts, Rams, Oilers and NFL Europe, becoming a decorated athlete and earning the respect of his teammates.

Life is a game of choice. How you choose to play the game determines the outcome. If you're sick of losing, join the “Winologist” as he unveils the playbook to a winner's mindset!

**The Time is Now!
Time Tracking & KPIs**Amanda Bossow | Head of Education | Lawyers with Purpose
Briana Moriarty | Head of Professional Services | Lawyers with Purpose & Estate Planning Law Center

April 26 | 10:15 am - 11:30 am

Time is the most valuable of commodities. Is your firm using theirs wisely? With proper analysis, time tracking offers a window into staff performance and expectation. Where are the patterns, the outliers and what needs to change? First and foremost, you must know how, what and where to track. We will demonstrate how to use Actionstep's time tracking features, discuss time templates, measure KPIs, show real time tracking samples and decipher necessary and unnecessary data. Don't waste another passing minute! Join us today!

**Do You Trust Your Funding?
Streamlining the Process.**

Kyle Madigan | Director of Operations | Estate Planning Law Center

April 26 | 10:15 am - 11:30 am

Does your firm have a sure-fire way of ensuring your clients' plans are properly funded from start to finish? Do you trust the process? This session offers a step-by-step demonstration of successful practices utilized by “The Lab”. Learn how to effectively streamline the process by making use of LWP's newly minted 1.0 Trust Funding Matter and Workflow, build and maintain funding tables, master confirmation meetings, and more! Heighten your understanding of systems and processes to take your firm to the next level of excellence!

**Medicaid: Learn the Rules.
Reap the Rewards.**

Adrienne Peters Sipes | Compass Estate Planning & Elder Law

April 26 | 1:00 pm - 2:15 pm

Does adding Medicaid to your practice seem too daunting a task? Do you find yourself lost in the weeds in terms of ever-changing rules and regulations? Imagine how your prospective clients must feel! Does additional revenue and increased referrals sound enticing? If your answer is “yes” then settle in for a deeper understanding of the legal technical concepts of Medicaid, identify referral sources, and utilize an array of LWP's resources including PWP Medicaid Training and the Medicaid Workflow in Actionstep.

**What Are “They” Saying
About You?**

Lisa Burline-Rose | Head of Sales and Marketing | Lawyers with Purpose

April 26 | 1:00 pm - 2:15 pm

The best form of advertising is word of mouth. What are your clients, prospects, professional contacts and employees really saying when you leave the room? What message are you sending out to the community? Learn how to control the conversation when it comes to fostering positive word of mouth advertising. Personalize your branding and share your unique story through everything from online campaigns, articles and blogs to community involvement, office decorum and aesthetic.

Hear genuine input from attorneys who have followed the process and generated positive results. By sessions end, participants will be prepared to take marketing and advertising assessments, implement tactical advertising strategies and design six-month goals to help improve word of mouth advertising. Come away equipped with the proper tools and methods to leave clients raving to friends and family! Lay the proper foundation and let them do the talking for you!

**Product Update: Guidr, CCS &
Actionstep**Brittney Shearin: Head of Product | Legal Technical Attorney
| Lawyers with Purpose

Andrew Beacock | Chief Technology Officer | Guidr

April 26 | 2:30 pm - 3:45 pm

Learn the latest in the world of Product Development! We will introduce our new team of professionals, walkthrough changes in the CCS, provide Actionstep updates, discuss Guidr's direction for 2023, unveil Guidr Medicaid and more! Attendees will have the opportunity to ask questions via “Slido”. All materials will be made available to participants after the session.

**Prove Your Value with a
Maintenance Program**

Alan Hougum, Esq. | Owner | Hougum Law Firm, LLC

Zoey Vecellio | Director of Operations | Hougum Law Firm, LLC

April 26 | 2:30 pm - 3:45 pm

Does your firm have a Maintenance Program? Would you like to implement one but aren't sure where to start? Do you want to prevent your clients from feeling like they were trapped in an extended auto warranty with no value to back it up? Learn how to enhance your practice by launching a successful Maintenance Program! We will discuss marketing, plans and offerings, setting prices for annual growth, event management, maintaining a budget, educating, and engaging clients during update meetings and more!

Leave a Dazzling Impression. Enhancing Client Experience.

Briana Moriarty | Head of Professional Services | Lawyers with Purpose & Estate Planning Law Center

April 26 | 4:00 pm – 5:15 pm

First impressions are lasting ones. How closely are you monitoring the client experience? What sets your firm apart from the competition? From the first phone call to planning to maintenance, details are everything! Are people sitting in the right seats to effectively promote their individual talents when it comes to client engagement? This session will dive into the significance of individual roles in building a healthy team dynamic, creating enriching experiences and defining and refining your aesthetic. From sending emails to measuring client experience through reports, by sessions' end you will be well on your way to earning glistening reviews and referrals!

THURSDAY, APRIL 27, 2023

Workshop: Elevate Your Profits

Pam Jordan | CEO & Founder | Pivot Business Group

April 27 | 8:00 am – 8:50 am

Grab a coffee and bite to eat before settling in for an interactive workshop courtesy of our breakfast sponsor, CEO and founder of Pivot Business Group, Pam Jordan. Pam is an entrepreneur, speaker, coach and financial expert who has assisted countless companies increase their earnings through her unique brand of profit analysis. Her expertise and commitment earned her recognition as Outstanding Business Executive of the Year and multiple features such as 40 under 40 in Triad Business Journal. Topics of discussion will include Value Billing, the 2% change formula and how to incorporate P&L and chart accounts. Come prepared to participate and examine your own firm's numbers.

Revenue Focuser to the Rescue: Measuring Goals

Amanda Bossow | Head of Education | Lawyers with Purpose

April 27 | 9:00 am – 10:00 am

What is the LWP Revenue Focuser? Let us show you! We will demonstrate how to calculate attorney time and plan revenue, in terms of reaching your monthly, quarterly and annual goals. Identify the data necessary to compose your focusers and learn how to interpret your results.

Participants will be given the opportunity to fill out their own focusers and have it reviewed by an LWP member. The LWP Revenue Focuser is a valuable tool to help your team measure, reach and even exceed your goals!

Use Your Resources! Drafting in 2023.

Brittney Shearin | Head of Product | Legal Technical Attorney | Lawyers with Purpose

Erach Screwvala | Legal Subject Matter Expert | Lawyers with Purpose

April 27 | 10:15 am – 11:30 am

Drafting is crucial in ensuring your plans cater to the individual needs of your clients. With so many available resources in the LWP universe, are you confidently using them to your advantage? If your answer is “no” or even “maybe”, you will want to join us for an educational tutorial led by two of LWP's Technical Attorneys with both personal and professional insight into best practices and common pitfalls that come with the territory. Discover underutilized features of the Client Centered Software (CCS) templates, get a comprehensive overview of the SORT, CRT, IRA Analysis tool and test your drafting knowledge through sample fact patterns.

Focus and Success with RMS

Phil Miner | Subject Matter Expert | Lawyers with Purpose

April 27 | 10:15 am - 11:30 am

A Relationship Management System “RMS” like any other system must be properly maintained to continue running smoothly and efficiently. RMS is an inevitable investment of time, focused efforts and resources. Are you getting the best return on your investment? Find out by getting acquainted with the multitude of available LWP Focusers, designed to track and analyze data, including the RMS Focuser Summary, the RMS Meeting Focuser, the RMS Referral Focuser and more!

Why Day. Building a Firm that Roars in the 20's

David J. Zumpano, CPA, Esq. | Lawyers with Purpose

April 27 | 1:00 pm - 5:15 pm

On Why Day, Dave Zumpano will show you how to make the 2020s the best years of your professional life. First, we'll explore your core values, past experiences, and mindset to get a clear vision of precisely where you

want to be in 2030. Then, we'll identify the core elements you need to achieve your 10-year vision, your three-year goals, your one-year focus, and your 90-day objectives. We'll also look at the three successful practice models: small firm with high profits; larger firm with commensurately greater profits; and a firm that operates profitably without your daily supervision. We'll examine the four key pillars of success for the model you choose: legal-technical; operations and accountability; strategic marketing; and your mindset together with that of your team. By the end of Why Day, you will have created your personal road map to get where you want to be in the next 10 years and beyond.

FRIDAY, APRIL 28, 2023

Firm Retreats: Rising Above Challenges

Self-Led

April 28 | 9:00 am – 1:00 pm

Join forces as a team to strategize both your individual and professional goals. Learn to set measurable objectives utilizing Brainstorming Sprints, the Money Plan, the Four-Month Focuser, the Implementation Focuser, and the Project Focuser. Come with your ideas and an open mind. Equip your team with the tools to prepare for and conquer obstacles in the coming quarter!