

Lesson 2 - Start-up Considerations



This lesson is a primer on starting your new Advocacy service. Of course, every student has a different level of general business expertise. Since we can't address each of you individually, we'll keep the presentation as general as possible to accommodate beginners. This lesson is also important for more advanced students because it is specific to the advocacy business.

Going into Business

If you have never been in business before, we recommend getting a free copy of the IRS Small Business Tax Guide from the Internal Revenue Service. We also recommend that you get a basic business start-up text or attend one of the Small Business Administration/Small Business Development Center's inexpensive start-up classes.

Regardless of business type, a wise entrepreneur should carefully evaluate the planned venture in three dimensions:

- Time
- Space
- Monetary resources

Most small businesses fail because they lack adequate funding and/or they're poorly managed. As we see it, inadequate funding results from poor management planning. So let's start with management.

The Disability Associates training program provides much of the basic groundwork for your business. However, unless you're using a Mentor, we won't be holding your hand during day-to-day operations. With or without our help, it is good management practice to be aware of what's happening both within your company and within the SSA system.

Choosing a Business Entity

The type of **business entity** that you choose is very important, as it defines the legal structure of your business. To officially begin your business, you must register with the State, at which time you decide on the type of business entity you want. Your decision should be mainly based upon three important considerations:

1. **Liability:** This is the level of business risk you find acceptable in order to operate successfully. Fortunately, in the field of Disability Advocacy, the risk of a lawsuit from an applicant is extremely low. There are many reasons for this happy fact, but the main one is the fee structure that SSA has created. SSA only allows fees for successful cases, so the claimant loses nothing if the case is denied. If the claimant has suffered no loss, there's no basis for a suit.
2. **Funding:** It costs money to start and run a business. The long-term costs vary depending upon the type of business entity you choose. For example, it costs more to start and run a "C" Corporation than an "S" Corporation, but your personal liability is lower with a "C". If your budget is very tight, consider starting as a sole proprietor.
3. **Taxes:** Different entities are taxed differently. You may want to consult with your accountant before deciding which business entity is right for you.

REMEMBER: You can change entity type if your circumstance changes.

On initial start-up, we recommend that a new advocacy service begin as a sole proprietorship. This is the cheapest and easiest legal structure to create and you don't need an attorney to do it. There are no reporting requirements for a sole proprietor and it is **relatively** easy to handle at tax time. Since everything you earn as a sole proprietor is considered regular income, it's pretty easy to control. Regardless of the entity type you choose, always consult an accountant for recommendations.

Creating a Sole Proprietorship can be accomplished quickly and generally at a cost of less than \$100. Usually it involves a short letter explaining the purpose and primary services offered by the company. You take the letter to your local or state business registration office. Fill out any required forms and pay the

registration fee. Your advocacy service is now legal in your state of registration and you can begin your practice.

As your company grows, you may want to consult an attorney and accountant to change your business structure to that of an S Corporation. This business type gives you more liability protection for not that much more money. Legal and tax requirements for this business entity vary from state to state so be sure to consult a specialist before taking this step.

It's also a good idea to find out about any special legal requirements in your state for a business. You can get this information directly from your Secretary of State or by using a free consultant service like the Small Business Administration (SBA).

Some states for example, require advocates to have a consultant's license. Do what you need to do to comply with state requirements, keeping in mind that Federal regulations supersede any state regulations when it comes to disability representation. Your state cannot prohibit you from acting as a non-attorney representative because this program is controlled by Federal regulation.

The Initial Investment

We have claimed in our ads that you can start a disability advocacy service with a low initial investment. Now that you have purchased this course, we're not about to change our tune! When starting up, plan exactly how much you want to invest, taking into consideration the items listed below:

- a) Start small and build gradually. If your growth is too rapid, it can destabilize the business.
- b) Decide how much you want to invest in the start-up. Plan your start-up steps and create an operational budget to cover those steps.
- c) Make sure your budget includes marketing. Decide how to spend your funds most effectively to bring customers to your new business.
- d) Once you have a plan in place, set aside the funds to cover your budget and try to keep spending within this predetermined limit.

The above may sound elementary, but you'd be surprised at how many

entrepreneurs ignore these basic rules and suffer failure as a result.

Start-up Requirements

You'll be pleasantly surprised at just how little you need to operate an advocacy business. Here are the basic requirements and why we recommend them:

Home Office: Unless you already have a business office, Disability Associates recommends that you start from your home to reduce overhead. You must use your home office space strictly for business if you plan to claim it on your income tax. Speak to your financial adviser.

Any expenses that you incur in remodeling and utilities (phone, etc.,) are deductible as home office expenses. Utilities and other costs associated with your home office are calculated based on the percentage of your total home space that the office takes up. If you make improvements, you can usually only write off the home office portion.

The newest tax laws only allow you to write off home office expenses against a positive net earned income. This means that if the business doesn't show a profit you can't take this deduction. However, you can carry over certain cost to the next year.

Licenses and Permits: In most states there are no special licenses or permits required for a disability advocate, but you are required to register your company as a business before beginning operations. Check into the need for a consulting license or special permit in your state. Usually if a consulting license is required, it's not very expensive. Take the time to look into and follow the specific licensing regulations in your state.

Liability Insurance: SSA only allows you to collect a fee if you win the case. Therefore, when you get paid you almost always are dealing with a satisfied customer! As a result, malpractice suits are highly unlikely. In our many years of service to this industry, we have never come close to being sued by a client. Based on this experience we do not recommend spending a lot on liability insurance in the beginning stages of your service.

Note that once you are certified, SSA requires that you have liability insurance for your service. If you do not maintain liability insurance once certified, you could lose your certification status.

Accounting and Taxes: The US tax code is daunting even to experts.

Therefore, we recommend that you develop a relationship with a CPA and learn a little about basic bookkeeping.

Check out the accounting/bookkeeping company's reputation before signing on. Look them up on your local BBB website. If your state has a regulatory agency overseeing accountants and/or bookkeepers, make sure they have no complaints against them and that the service is properly licensed. Also, make sure that the person your hire for tax purposes can handle an audit.

You'll also need a basic bookkeeping program like QuickBooks Pro or Peachtree. Our Olivia software enables you to bill a client and even generate an automated fee petition attachment, but is not meant to be an accounting program. Either of the above-recommended programs is excellent, although most folks say QuickBooks is more user-friendly.

Your bookkeeper or accountant can set you up in an accounting program making the exchange of data easier for both you and your account. Using an accountant frees up your time to concentrate on developing your advocacy skills. At tax time, your accountant will determine what's best for your circumstance.

Your monthly costs for this service shouldn't exceed \$50 - \$100 per month depending on the size of your firm. Be sure to set aside funds for your end-of-the-year tax and accounting services. Keep your company books up-to-date and easy to understand. In bookkeeping there is an old saying, "keeping it simple also keeps you safe - from the IRS."

Computer: You will need a computer equipped with word processing software. You'll also need an email account, a traditional and mobile website. If you're using our Olivia Prime software, this will cover all of your case processing and client communication needs. We can also integrate your Olivia software into your business website.

Printing and Supplies: A color printer with scanning capability is important. A scanner will enable you to transform paper evidence into digital evidence and then upload it into Olivia. To create a professional image, create a logo for your business and put it on a letterhead for use on all correspondence. Olivia Prime can automatically add your logo to correspondence if you desire. All you need do is add your company data and logo to the Olivia - My Company segment.

Mail: Your mailing costs will be directly related to the role mail plays in your marketing and operating strategies. Most of your case-related correspondence

will be in digital form but paper format is still likely. Therefore, you can't completely escape old fashion mail in this business. Always send your correspondence to SSA by certified mail to prove the documents were sent.

In our approach to disability advocacy, we request a development fee of around \$100 from the client at the beginning of the case to cover incidentals like long distant phone calls and postage. This approach cuts down on your out-of-pocket expenditures.

Equipment: Along with a computer, you'll need a phone, a desk, a printer, scanner and fax combo. It's a good idea to have a secure filing cabinet for your paperwork. A security firewall program for your computer is also highly recommended. Most office equipment, including furnishings purchased solely for business use, can be either deducted as an expense or depreciated over time. Whether you expense or depreciate is an accounting question that you should take up with your tax adviser.

You can rent or lease equipment until you become confident in your service's ability to succeed. You can write off the monthly payments as a direct business expense and return the equipment if you choose not to stay in business. Of course, if you decide that this is going to be a long-term commitment, purchasing furniture and equipment is more cost-effective.

A dedicated business telephone is also important. It will need to be equipped with call-forwarding and phone conferencing capabilities. Most Advocates begin their practice locally, so there isn't a problem with long distant calling. You will make some interstate calls so find a cheap long distance plan. If quality isn't an issue, there are many inexpensive online phone services available.

You should also have an answering service or machine to take calls while you're out of the office. This lets you keep tabs on your company and accept new clients without hanging around waiting for a customer to call.

These days most Advocates use cell phones, as these systems provide all the features you need to operate your service efficiently. Internet access from your smart-phone and tablets also enable you to access your Olivia Prime software. This makes mobile commuting easier so that you can practice from any location.

Reference Materials: Along with a business start-up guide, we recommend

that you purchase the following reference materials. These materials will be helpful in your practice.

Merck Manual: As a Disability Advocate you'll be dealing with numerous claimant impairments. Even if you're a medical professional, you will need to occasionally research a disease state. The Merck is a great source for learning about a disease. The manual costs around \$45 and can be purchased or ordered from any bookstore.

Disability Associates provides a useful text called the Diagnostic Restrictions Guide (DRG). This DRG focuses on physical limitations caused by a disease category. The Social Security Disability Guide (SSDG) is also provided in your training package. The SSDG contains useful medical reference materials that cover all fourteen of the medical categories of disease.

Medical Dictionary: A medical dictionary enables you easily look up medical terms and definitions. We highly recommend that you have one available when practicing.

Note: You should use original SSA forms when applying for disability benefits. However, as part of the government's paperwork reduction drive, SSA now allows you to get forms online by visiting www.SSA.govonline.

WARNING: If an SSA employee refuses to give you an SSA form, ask to speak to a supervisor. Tell the supervisor why you need the forms and remind him/her that all SSA forms are in the public domain.

If you request forms by phone or at the DO, always ask for them by **functional name** rather than by number. Don't be surprised if an SSA employee has no idea what form number you need. Describe the function of the form make it easier on everyone. Form numbers occasionally change so don't panic if the employee doesn't know what you're talking about. Your training syllabus in Module One also contains a link to SSA forms.

In some situations, writing a letter can substitute for a particular form if you spell out the purpose of the correspondence. For example, you can present your client's past work history on SSA Form 3369 Vocational Report or you can present the information in a narrative letter. Both are valid.

Marketing Plan: Promotion is critical to any business. This doesn't mean you have to destroy your personal budget in order to find customers. There are many marketing methods that are effective, legitimate and low-cost.

To maximize your exposure we suggest that you focus on your local community first. Disability Associates refers to this marketing approach as "*Community-Based Marketing*".

As in any business, success in disability advocacy is determined almost as much by marketing strategy as it is by perseverance. *Don't do anything marketing until you have a plan!* Instead of purchasing advertising right away, we suggest that you use public relations methods, agency referrals and Internet marketing in the early stages of your business. You can expand your marketing techniques as you gain understanding of your clientele.

Disability Associates provides a mini-course in marketing and advertising in Module Six of this program. We also provide a text called the Marketing Manual. The Marketing Manual contains a complete guide to basic marketing approaches. Regardless of the marketing approach you choose, test it first for at least ninety days.

Defining a Territory

Most disability advocates practice locally - that is, they only accept cases within their general geographic area. This is a smart move for the beginning advocate. You can more quickly develop professional maturity in the field by working with SSA officials whom you can easily visit face-to-face. This approach eliminates long distance travel and saves you money. Starting locally allows you to:

1. Learn how your state's DO, DDS and Regional Offices function.
2. Form friendly relationships with local SSA staff.
3. Avoid getting caught up in out-of-state cases.
4. Cuts down on travel costs.
5. Reduces marketing and advertising costs.

6. Provides a familiar advertising target
7. Emphasizes your community-based marketing plan.
8. Allows you to focus your marketing efforts.
9. Enables you to use word-of-mouth advertising

Of course, you can market your service in any way you choose. However, we suggest that you concentrate on your own community first. As you succeed, you can expand your marketing to even larger areas of your state. When you decide to expand your service to another state, use a partner located in that state. This gives you all the advantages of a local practice without the interstate headaches.

For example, if you're representing a case in another state and an ALJ requests a hearing, you must attend the hearing. SSA won't usually reimburse you for an out-of-state hearing, which means that you must foot the bill. If your local partner handles the hearing, SSA will reimburse him/her for his expenses.

Attracting Potential Clients

If you launch your business locally as we recommend, your initial challenge will be to become known in your community. Before spending a dime, explore every possible free approach to gaining public exposure. You'd be surprised at the number of no-cost marketing opportunities out there!

As your service grows, you'll begin getting clients through community referrals and word of mouth. However, media advertising can provide valuable public exposure in the start-up phase. The more a customer hears about your service, the more likely he/she is to trust and use it.

When we first began our firm some thirty-eight years ago, marketing was the main challenge because of the uniqueness of the service. *"How much money should you put into your first marketing campaigns?"* Answer: As little as possible. We started by focusing on establishing credibility. We were marketing neophytes who had never heard of public relations.

No matter what area of the country you live in, there's a nearby Social Security District Office, which is the main place where applicants go to apply for

disability benefits. We quickly discovered that SSA wasn't going to allow us to approach potential customers in their offices! But, outside the office was open territory. First, we designed a brochure/business card with a simple message on the back that introduced the company, service and concept. It said:

Sample Ad: We can help you get Social Security disability cash benefits within **90-120 days!** If you have applied or are thinking of applying for these benefits, don't go it alone. Hire an expert - ***no fee unless we win!*** Free case review by phone! Call (*Company phone number.*)

Then we created an ad that we still use to this day:

Determine your chances of receiving Social Security disability benefits! Free case review! No fee unless you receive your cash benefits. Call or visit our website at....

Note: The terms "Case Assessment" and "Case Evaluation" do not appear in either of our sample ads. A person applying for disability benefits has no idea what a case evaluation or assessment means. We also discovered that technical terms tended to scare clients away. Avoid them if possible.

After hanging outside our local DO for a few days, an SSA official began telling us that we couldn't do this. So, we crossed the street to get off SSA property! I remember standing there with a big sign directed to those leaving the building.

After a while, the SSA came across the street to ask us to leave, so we did - after having successfully distributed our information to over 500 people. We were only out of pocket for the design and printing cost of the brochure and

business cards. We had successfully solicited over 500 people within our specific target market – people applying for Social Security benefits.

We then hired a pleasant-looking young lady to start the handout process all over again. We instructed her to dress conservatively and note people exiting the DO and headed to the parking lot. She was to POLITELY offer the brochure to anyone leaving who wasn't wearing a suit – especially if he/she appeared unhappy. The cost of this approach was low and it worked extremely well. In less than forty-eight hours she generated over 100 leads. By the time SSA asked her to leave we had accomplished our initial goal.

This basic approach put our fledgling company on the map overnight and the phone has never stopped ringing since! But we didn't stop there! Our next step was to send out a four-page direct mailer that introduced the service to the local community. We used zip codes to focus on our target market, which was working middle class people.

We also sent letters to as many medical-related organizations as we could find. From all this activity, we were able to set up meetings and presentations about disability advocacy. This helped us get the word out and developed amazing credibility for our firm.

What Did We Learn?

The most important lesson of those early years was that we couldn't afford to just assume that people understand the value of this unique service. To be successful, we had to educate the public about the benefits of using a non-attorney representative.

Who is Your Target Market?

Before we did anything, we developed a marketing plan. Then we followed that plan to the letter with the positive results described above. YOUR successful marketing campaign must also begin with a plan. And like ours, that plan must be based on one question: Who is my best customer?

Who are you trying to reach?

Here is a short list identifying those custom characteristics that would best meet

your marketing needs.

- Has a twelfth grade education.
- May be either a white or blue-collar worker.
- May be a skilled to unskilled worker.
- Is slightly more likely to be female.
- 20% to 25% are likely to be a member of a minority group.
- A proud, hard-working, anti-welfare individual who is concerned about his/her financial future.
- Has physical impairments in 75% of cases, strictly mental impairments in 30% of cases and a mix of both physical and mental impairments in 65% of all cases.
- Has an average family income of \$30,000-\$90,000 per year.
- May live in any setting from a large city to a small rural community.

The ability to speak Spanish is also a plus due to the expanding Hispanic population. It is always a good idea to keep your finger on the pulse of demographic changes so that you can adapt to a changing clientele.

Marketing vs. Advertising

Marketing is the overall approach to attracting customers to your business. It includes developing your company image, determining your target market, setting a budget and designing required marketing materials. Advertising is the actual advertising medium used to get the word out. Example: TV, radio, etc.,

Your marketing plan should include:

1. Determining your target market and the characteristics of your desired customer.
2. Developing the materials used to communicate your message to customers. This includes a logo with a short "*tag line*" that summarizes your company in a simple phrase. Materials should have a consistent appearance that you will use for all business cards, brochures, web pages, etc. The colors you choose for your logo and business design are very important psychologically for your customers. Stay away from bright reds.
3. Deciding the most effective ways to approach your desired customer and how much the approach will cost is determined by your

location, marketing plan and budget. One of the most important of these expenses will be your traditional website.

Your advertising should begin with local sources such as newspapers, city magazines, thrift papers, flyers, cab signs, bus benches and of course a well-designed website. You should also use local focused Google advertising to test your ads. We've found that ads on Craig's list actually work better than Google ads but both are limited. The real difference is that Craig's list is free.

Advertisements should be tastefully designed and eye-catching with a brief, impactful message. However, we don't believe that ads are your best first choice. Here are some important marketing avenues that we recommend as your starting point:

Internet Marketing: You must have a website to be successful in today's market. With Mobile search at 60% and growing, you should also have a mobile website for easier customer viewing. Use your website to provide free information to potential clients:

- Company contact information.
- An explanation of your service.
- The benefits of using your service.
- General information about the Social Security disability process.

Providing information about your service with instructions on how to use it is absolutely critical to your success. An effective website multiplies your ability to get your message out. Potential customers should be able to learn from your website exactly what to do to take advantage of your service – and why!

Create a method to collect your website visitors' contact information. One of the most common ways to do this is by requiring e-mail addresses in order to access your free information.

You can also create an online form so that the interested visitor can provide you with details about his/her impairment. Olivia Prime enables you to add an abbreviated case assessment form to your website. This form starts the process and automatically contacts you. This approach enables you to contact the client directly and finish the assessment process. These are non-threatening ways of getting potential customers to interact with your service.

Make sure you understand Internet security and can protect the visitor's

personal data. This would not be a problem if you're using Olivia Prime. All data stored in Olivia is secure. On the website, assure the visitor that any information he/she provides is confidential and protected. Add your free Olivia Security Badge to your website to let customers know that their data is secure.

Open Source Marketing: We have found that you can effectively reach your target market through what we call “**open sources**” - any service that works with people with disabilities and/or other medical issues. And if you approach these open sources correctly, you won't have to pay them a dime.

The first rule of marketing is “WIIFM” (What's In It For Me). Accordingly, the secret to getting open sources to cooperate with you is mutual benefit. So when approaching any open source, ask yourself what THEY need from you. For example, you can establish them as part of your network. You direct customers in their direction, which in turn motivates them to direct potential clients to you.

Example: You approach a non-profit that works with individuals with medical disorders. You explain your service to the Administrator and point out the mutual benefits of developing a relationship. You convince the Administrator that you can direct customers to his/her medical offices. All you ask for in return is that they recommend you.

Agency Marketing: This involves networking with local government agencies that work with people who may need your services. In order to lure agencies you must develop an inside contact. You can do this by befriending an agency employee preferably the director.

Some agencies that work with the disabled are wide open for exploitation. State vocational rehab offices for example, work directly with SSA to help people return to the work force. They also deal with many people with serious impairments who haven't yet applied for benefits. Developing a personal acquaintance with private and state rehab offices has the potential to open a

free referral source for your business. *Why?*

Recall the WIIFM or *What's In It For Me marketing slogan*. Voc Rehabs need to move cases. If they can't find the disabled person a job, they will recommend that he apply for benefits. You help move the agency's caseload in the next best way - you offer to review clients for their potential to receive SSA benefits for free. If a case looks viable, you can take it over and the rehab counselor can remove it from his/her caseload and everybody wins!

Experiment – Use Your Own Creativity and Imagination!

Experiment with as many down-to-earth ways of becoming known in your community as possible. Do this even as you use traditional marketing. ***Think community!*** Spread the word about your service via your friends, church, club memberships, family doctors, etc., It's amazing how quickly a service can grow by word-of-mouth alone if you put in the effort. This network marketing approach is highly effective in small and/or closely-knit communities, but can work in any setting.

Leave your business cards at your local welfare or public assistance offices, state vocational rehabilitation offices and businesses that deal with the disabled. There are many organizations in a community that work with people with medical issues. Make a list of the ones near you and approach them to explain your service. Offer free case reviews to their clientele.

Some of our students have reported good results with brochure display stands. They develop relationships with local pharmacists who allow them to place a brochure display at the pharmacy point-of-sale. In exchange, the advocates put ads on their websites for inexpensive high-quality medications at these pharmacies, prosthetic and even eyeglass stores.

Paid Advertising:

Investigate Before You Invest. There are no guarantees in paid advertising. Take the time to investigate any paid source before you invest.

If you've got the budget, we recommend radio advertising. A small local radio campaign can be fantastic for start-up advocacy service. People seem to trust what they hear on the radio and trust is one of your most important business

assets.

While radio is a quick and easy way to get your company's name in front of potential customers, look for ways to mitigate the cost and still enjoy good advertising results.

We have also found bordered ads in local newspaper classified sections to be one of the **least** effective methods of finding new customers. It can have some effect in small communities but work poorly in major communities.

Keep in mind that it takes a certain amount of repetition before any advertising avenue begins to show results. If you haven't seen a response to your ads within a few months, it's probably time to quit.

Be aggressive, but don't be foolish! Unless you have the cash available, hold off on expensive media buys. Try getting some free exposure by letting your local newspaper and public radio stations know about your service. Disability advocacy is such a unique public service that you'll be amazed at its newsworthiness.

Try requesting free airtime on your local public access channel to explain the concept of non-attorney disability representation. I've done several radio and television shows explaining the subject that resulted in hundreds of referrals. Ask to rebroadcast your shows. You'd be surprised how many people watch these channels for community information.

Well-designed business cards and/or brochures quickly introduce your service. As demonstrated in our first approach to business, these marketing materials may be all you need to get started.

Always use your company logo and "*tag line*" on any marketing materials or paid advertisements that you produce. Many paid advertisers will offer to create your ad for you. Make sure they produce something that stands out! The best way to create display ads is to use a graphic artist. If you choose to develop your own ad, don't use clip art – people see it as being cheap. **FIRST IMPRESSIONS ARE EVERYTHING!**

Other Paid Advertising Techniques

We have found that billboard ads can quickly gain public awareness for your service. Place them within two blocks of a DO on streets leading to and from

the DO office. This maximizes the number of people who see your ad after leaving the SSA office – the time when they're going to be most interested!

Small poster signs can also be effective, but don't put them on Federal property without permission! Litter laws also become a problem with small signs. Use only a few strategically placed signs when possible. Nice-looking multiple colored signs tend to last longer for reasons we've never figured out.

Once your business begins to generate cash flow, you can afford more expensive options. We have used movie theater ads (the ones that run before the movie starts) and they really produced results. At the time they were fairly new and untested, so they were still affordable. Today, you need big bucks to add this approach to your advertising arsenal.

Before deciding to use any marketing approach, please review the Marketing Manual portion of your advocate training program Module Seven.

Intangibles

Some aspects of marketing are subtle and somewhat intangible. For example, a reputation for professionalism can move your company forward. While we can't control the amount of time that SSA takes to reach a decision, we can minimize the time you have to spend on a case over its life-time. Reducing this time element increases overall profitability and boosts your reputation for professionalism.

Note: Never allow time or your workload to interfere with your concern for the well-being of your clients.

Professionalism **demand**s that you do the best possible job for a client no matter what. Maintaining a professional image may cost a little more, but it will serve you well in the long run. Your integrity is key to building your reputation and establishing trust in your community.

Be professional from Day One

Always return phone calls and respond graciously to questions. Project

knowledge about the subject and concern about the claimant. Willingly provide information to those who are not your clients. Be helpful and friendly at all times and never abuse a client's trust. Be generous with them and share your growing knowledge openly. These small but important actions will attract people to your service like bees to nectar.

The Personal Touch

When claimants apply for benefits, they are dealing with a big scary bureaucracy. Just treating them with respect can bring them flocking to your door. Little things like thank-you notes and returned phone calls can go a long way to establishing rapport between you and a potential client.

No matter which avenue of exposure you choose, you may not always gain a client when you first meet. Many people believe that they can do it themselves, a belief that SSA encourages. But when someone gets his/her first denial notice, he will find your card and contact you for services as fast as he can dial the phone. To make sure this happens, we use an approach called Guidance.

With our Guidance technique, you are providing the potential client with information and contact data from your firm. You encourage the client to contact you if his condition worsens. You also inform the client that you will be contacting him within say six-days to determine if his condition has worsened. If it has, you can take the case at that time. The tool to execute this technique is built within your Olivia software.

Summary

This lesson was a primer on business start-up considerations such as business structure and the initial requirements for starting an advocacy service. We also introduced you to several marketing techniques that can really jump-start your new advocacy service.