

MODULE 8E Advocate Advanced Topics
SPECIAL SUBJECTS
L2 Keeping Clients Happy

No matter how good you are at attracting and signing on clients, your hard work will be less rewarding if you fail to keep your clients attached, happy and engaged. In this special report, I'm going to share a few of my operational secrets that took me nearly ten years to develop. Although my techniques for keeping clients happy are subtle, they are still important to the success of your advocacy service. Please feel free to adjust my suggestions to fit the nature and personality of your service.

Why Clients Change Representatives:

To best understand how to keep your clients happy, it may be helpful to know why a claimant may seek to change his or her representative. As the field of disability advocacy becomes more mainstream, clients are learning that there are alternatives to using an attorney in a Social Security disability claim. Claimants are seeking alternatives to attorneys because they are falling victim to some not-so-nice tricks of the trade. These tricks are causing many clients to become fed up with attorneys. This situation opens up a new avenue opportunity for disability advocates.

What are these tricks that can so turn off a client that he would look for an alternative to an attorney? Before I list them, I want to say this: Never use these tricks! In my eighteen years of offering training, not a single student has gotten him or herself in trouble as a result of the knowledge I provide. I would really like to keep it that way!

Here are just a few of the tricks some attorney representatives use that anger clients:

1. Asking for high development fees on multiple occasions to cover undisclosed costs.
2. Doing little or nothing to expedite a case decision. Instead of actively participating in moving a case forward through the disability process, some reps would simply allow Social Security do the work. If a rep lubricates the process with his assistance, Social Security will usually finish the case sooner.
3. Some Representatives also sit back and allow Social Security to formulate the entire representational strategy.
4. Neglecting to put effort into the initial application. Yes, most cases are lost on the initial level. However, the initial application is also the first and best opportunity to formulate and execute a case strategy. If the strategy is sound, it will improve your chances of winning the case on appeal.
5. Hitting the client with significant fees if he requests termination of the representational relationship.

6. No feedback to client! This is a big complaint from those wishing to change representatives. Attorneys are notorious for leaving their clients in the dark. If you don't periodically inform the client of your actions, he'll assume that no action is being taken. This perception, no matter how inaccurate, will cause the claimant to experience unnecessary anxiety. If the client is anxious, this will decrease his confidence in the advocate.

The CF Regulatory Approach to Case Processing:

If the above activities weren't bad enough, there is another mistake being made by some attorneys in this field. This mistake is not really the fault of the attorney. It is more like a built-in disadvantage for attorneys who represent Social Security disability claims. The mistake is in using the regulatory approach to representing a case. This approach, which most attorneys use as protocol, is methodical and no more effective than my common sense approach at winning cases.

The Code of Federal Regulations (CFR) approach requires that you not only do all the usual review of evidence, it also forces you to do historical research on each case. You must then insert your findings as part of your argument on behalf of the client. OK, this approach does work. But it takes three times as long for basically the same result. The client is sitting there wondering when he'll receive his benefits. He doesn't care how you get them. The client simply wants you to get the benefits started as soon as possible. The longer it takes, the greater is the client's potential level of dissatisfaction. The CFR approach adds time to case processing and works against the advocate.

Practical Operational Solutions:

The average time it takes Social Security to process a claim is approximately 107 days. This is really not bad considering the complexity of this service. As an advocate, if you're able to complete a case in less than 120 days, you're doing a great job. Keep in mind that speed is only part of the formula for success. You must also maintain a high level of customer satisfaction. To ensure a high level of customer satisfaction, you must communicate often with the client.

Communication is the Key:

My many years of practice have allowed me to observe and learn exactly what it takes to make a disability applicant happy during that stressful pre-decision period. The answer is communication! The more you communicate with a client, the higher the client's satisfaction level.

Here are a few suggestions for communicating with clients:

- Never promise the claimant that you'll win the case. Social Security makes that decision.
- You can promise the claimant that you'll do everything within your power to win the case. Use this statement in marketing!
- You can also safely promise to move the case through the Social Security system as quickly as possible. Use this statement in marketing!
- Provide the client with an abbreviated case-processing schedule that explains the basics of what to expect during the processing of his case. See sample schedule letter below. You can use this approach in your Info Pack.

This sample letter explains the sequence of events for a disability case:

<p style="text-align: center;">My Advocacy Service</p> <p style="text-align: center;">Your Logo</p> <p>Dear Ms. Taylor,</p> <p>Thank you for choosing My Advocacy Service. Our primary mission is to assist and serve you during your application for Social Security disability benefits. My name is Your Name. I will be your representative and primary contact person during the entire application process.</p> <p>As part of our service, My Advocacy Service will personally handle every aspect of your application for disability benefits. However, there may be times when we must call on you for assistance in making sure the process goes smoothly. Your cooperation during this process is very important. It will help us bring your case to a successful conclusion more quickly.</p> <p>During the application process, we'll keep you informed as to the progress of your case. You'll receive periodic letters, e-mails, post-cards or phone calls, etc. notifying you of the disposition of your case.</p> <p>Here is what you can expect:</p> <p>It usually takes Social Security three or four weeks from the date of your application to move your case from the District Office to the Disability Determination Section (DDS). Once your case reaches the DDS, it will take another two weeks before your case is assigned to an Examiner. We know how frustrating Social Security's slow pace can be, which is why it is so important that we work as a team.</p>
<p>The above paragraph is an incredibly effective attachment line. It directly calls for the client's participation while placing you both firmly on the same team.</p>
<p>Once your case has been assigned to an Examiner, I'll contact the DDS to determine if the Examiner needs anything in relation to your case.</p>
<p>The above encounter with the Examiner is a unique opportunity to get to know this</p>

person. Key: Ask the Examiner if you can assist him in any way with the case. Especially with the acquisition of medical records. Examiners love this! If you can create a supportive friendship with an Examiner or higher Social Security officer, this will improve your access to the system.

If the Examiner needs anything related to your case, all parties will be notified by me until the materials are received. I'll then re-contact the Examiner every four to six weeks to enquire as to the disposition of your case. Social Security will send us a copy of their final decision. If the decision is in your favor, you'll be billed by me for the appropriate amount of your fee for services rendered. You will not be billed if the decision is unfavorable. However, I will contact you to determine if we should appeal.

In the above paragraph above, we've added a happy line. The happy line is the reminder to the client that there will be no bill without benefits. You've also added hope by reminding the client that he can appeal if the decision is a denial.

During your application, you should also expect occasional contacts from Social Security. They may ask for additional information or request that you complete a form.

If you receive any correspondence from Social Security, contact me immediately. Do not sign or complete anything from Social Security unless I know about it first. Notifying me will protect you from inadvertently hurting your own case. It is my duty as your representative to protect your interests during the application process.

In the paragraph above, we're providing the client with engaging instructions. The client is made to understand that these instructions are in his best interest. You don't want to exhaust your client with instructions. In fact, do just the opposite. Make every instruction as simple as possible.

Your case may take several months to complete. However, I'll do everything I can to expedite your case. I would like you to take a few minutes and review all of the materials within this packet. Please complete and/or sign where requested. After signing, please return all materials to the address below:

Your business address

Upon receipt of your materials, I will contact you with further instructions. I want to thank you again for choosing My Advocacy Service and I look forward to serving you in the near future.

Sincerely

Your Name

My Advocacy Service

Note: The language I use in this sample letter may not be appropriate for all educational levels. If needed, choose language that is less instructional and easier to understand. You also have the option of creating two instruction letters to better serve your clientele. One for the educated and one for the less educated clientele.

Keeping a client happy is in most cases a matter of communication. The more you communicate, within business reason, the happier the customer will be. If you communicate with your clients more often than would be expected, you'll have happy customers even if you lose their case. Somehow, good people respond well and think highly of services that keep them informed.