The High-Capacity Practice

Scaling and Streamlining Your Firm Without Compromising Compassion:

Growing Estate Planning & Probate While Keeping the "Heart" in Your Work

By Steven McClelland, JD, CELA
McClelland Law Firm, P.A.

ROAP MAP

1. Quick About Me
2. Paradox and Purpose of Growth
3. Capacity #1 – "The Team"
4. Capacity #2 – "The First Contact"
5. Capacity #3 – "The Consultation"
6. Capacity #4 – "The Work (Process and Drafting)"
7. Capacity #5 – "Tech Stack"
8. Capacity #6 – "KPIs"

MEET
THE FAMILY

ABOUT MCCLELLAND LAW FIRM, P.A.

OUR FIRM

ESTATE PLANNING, PROBATE, AND ELDER LAW FIRM

Steven McClelland, CELA

THE PARADOX OF GROWTH

The Dilemma

Most practice areas are high-touch and emotionally charged. Burnout and bottlenecks occur when manual processes meet high client vulnerability. Efficiency isn't the enemy of empathy; it's the enabler.

Purpose of Increasing Capacity

- Access to Justice
- Attorney Density (45^{th} out of 50^{th})
- Increasing Complexity
- Competition
- Barbell Effect
- Increasing Client Experience
- Personal Benefits (Quality of Life/Reduce Burnout)
- Revenue/Compensation

Quick Assessment

Quick Assessment

Think of your last 5 upset or confused clients.

Lifecycle Mapping

Document the case from retainer to signing or closure for pain points. Discover when clients ask "What's happening?"

The Team

HIGH-CAPACITY STRUCTURE

Role	Key Responsibility	Capacity Impact
The Attorney	Relationship, Strategy, Legal Review	Focused on high-value work
Paralegal	Substantive Legal Drafting & Research	Frees the attorney from technical drafting
Office Sec (OSS)	Intake, Onboarding, Greeting, Scheduling	Ensures consistent client experience & flow

"Let tech handle data, staff handle admin, and the attorney handle the legal direction and relationship."

WHEN TO HIRE

Revenue / Number of Employees. Goal revenue per employee $140,000 to $190,000.

Example
$520,000 / 3 = $173,333

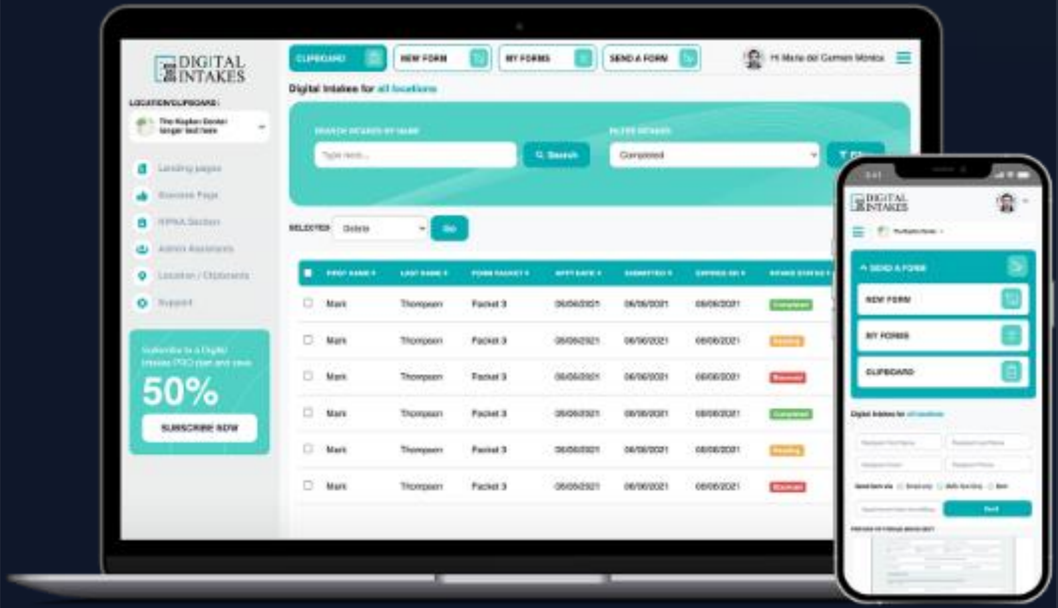
$390,000 / 2 = $195,000

The First Contact

REDEFINING THE JOURNEY OF INTAKE

First Impressions Matter

- **Amplify and Qualify: The goal of the person who answers your phones**
- **The Solution:** Automated intake process (questionnaire, text reminders, etc.)
- **The Edge:** Setup consultations for *connection* and *strategy*, not data collection.



REDEFINING THE JOURNEY OF INTAKE

Quick tips to increase capacity (Create Gatekeepers)

-Make sure they know what you take and do not take
-Have a referral list
-Filter questions (Free vs. Paid Consultations)
-Give them authority to say "no"
-Train them! (Biggest challenges of answering the calls is the different ways people ask for legal services
-Help them seem more professional (There is a scale from access to calendar to a live voicemail receptionist).
-Give them power! (If a client is upset about $350 or 1 hour of work time, comp it.)

REDEFINING THE JOURNEY OF INTAKE

Mastering the Welcome Series

-Phone Script (handling objections)
-Types of Calls
-Classification of Calls
-Types of Cases
-Rules, Rules, Rules for Success
-Office Visits
-Office Caretaker
-Tech Stack
-Core Values

TRAINING FOR EMPATHY

Culture & SOPs

Develop SOPs for "soft skills" — how to handle a grieving caller or family dynamics. Invest in firm retreats to align on the compassionate mission.

- Master the "Welcome Experience"
- Weekly 1-on-1s, Firm-wide meetings, retreats to prevent team burnout
- SOPs for "Highest and Best Use" tasks

The Consultation

REDEFINING THE CONSULTATION

Traditional Consultation

- Focuses is building rapport and likeability
- Goal is to avoid tension (like pricing)
- Answer the client's stated needs
- Be seen as helpful, available resource

Challenger Consultation

- Focuses on building credibility and insight
- Healthy tension disrupts the client's current thinking and reveal hidden risks they didn't know exist

REDEFINING THE CONSULTATION

Traditional Consultation

- Focuses is building rapport and likeability
- Goal is to avoid tension (like pricing)
- Answer the client's stated needs
- Be seen as helpful, available resource

Challenger Consultation

- Focuses on building credibility and insight
- Healthy tension disrupts the client's current thinking and reveal hidden risks they didn't know exist

REDEFINING THE CONSULTATION

METRIC	TRADITIONAL METHOD	CHALLENGER METHOD
Starting Point	"What keeps you up at night?"	"Here is what should be keeping you up."
Tension Level	Avoids tension to keep harmony.	Uses tension to drive change.
Relationship	Aims to be a "liked" service provider.	Aims to be a "trusted" expert guide.
Outcome	Commoditized document sale.	Strategic risk-management partnership.

REDEFINING THE CONSULTATION

Leading TO vs. Leading WITH

Leading With (“Product Pitch”): Starting with your solution (e.g. “I draft Trusts.”) This forces the client to compare you purely on price and features.

Opening hook: I specialize in Trusts.

Leading To: Start with insight (e.g “Probate is a public audit of your life.” This earns you the right to present your solution.

Opening hook: Let’s talk about why your current bank accounts are ‘blind’ to your family’s needs.

The Result: The Solution is no longer an expense; it becomes the only logical path to safety.

The Work (Process and Drafting)

Emails with Videos

SM to Do

Probate Workflow: From Intake to Closing Implementation

01
INTAKE STAGE - Consult Scheduled

Schedule Appointment
Options: (1) Consult (2) Review ($350) or (3) Video ($40) and Follow-up $200
Send Questionnaire (Text/Email or Paper)
Form by OS
Form "Probate Video Series"

02
INITIAL MEETING

Create Folder
Meet with Attorney
FORM: (1) Attorney Post Initial Review (if no case) (2) DE or SEA Custom LSA

03
PNC STAGE - PENDING LSA with 30 Days (PR)

Pipeline: **Pending (Probate - DE and SEA and Guardianship)**

OS followup on electronic LSA
Contact 1
Contact 2

04
PNC - Hired STAGE - Hired (Estate Planning)

Hired (Probate)
Signed LSA + Retainer

PRDE Created

05
Case Opened

- Hired Status
- Petition + Acceptance Signed
- Docs - Death Certificate + Last Will
- Coversheet + Filing Fee
- Bond Issue (unlikely)
- **PR: Bond**
- **PR: The Petition is Filed**
- **PR: Process The Letters**
- **Email: Heir w/ Waiver**

06
Notice

Newspaper Publication
Heirs/Devisee Notice

07
Inventory

Due 60 days after appointment
Find Assets
Marshall Assets
PR: Process Ein Number (Attach EIN)

08
Misc. Issues

PR: Process Selling Property
PR: Real Estate Agent Email
PR: Personal Property Options

09
Final Distribution

PR: Creditor Period
Final Inventory/Accounting/Family Settlement Agreement
FORM: Final Checklist
60-day waiting period for final hearing

10
Receipts, Release, & Closing File

Move to Probate (Hired) Closed

Upsell Email to do Estate Planning

Notes: PRP should not be involved in Step 01 to Step 03

Initial Folders
Only for in-person meeting
Include obituary + deed

STAGES
CONSULT SCHEDULED
PENDING LSA 30 DAYS (PR)
HIRED (Probate))
HIRED PR CLOSED

THE DRAFTING

Document Automation

Leverage drafting templates and conditional logic to reduce hours to minutes. Draft at 95%+ accuracy.

Mistake Proofing

Standardization eliminates human error caused by overwork. Quality remains high regardless of volume. Build a John Doe and Jane Doe document list

Faster Turnaround

Deliver documents in days, not weeks. Quick resolution is a primary client satisfaction driver.

The Tech Stack

THE TECH STACK

Mission-Critical Tools

- **Practice Management:** Centralize cases and deadlines (Clio, MyCase).
- **CRM & Intake:** Nurture leads and onboard seamlessly
- **E-Sign & Portals:** Easy cooperation for elderly or out-of-state heirs.
- **Automation:** Drafting tools like WealthCounsel or HotDocs or Lawcus

"A CRM is non-negotiable for growth. One missed phone call costs more than the annual subscription."

The KPIs

KPIs for Each Team Member

Associate Attorney KPIs (Post Initial Notes, Associate Points, Billables, NPS)

Paralegals (Time in Pipeline, EPD Number)

Pipeline Management

Post Signing Notes

Thank You!

Contact Information

Steven Mcclelland
McClelland law firm, P.A.
135 shadow oaks drive
Sherwood, AR 72120
steven@mcclellandfirm.com
Office (501) 834-2070
Cell (785) 250-1394