

COLLABORATIVE Practice Tips

A monthly bulletin from the CP Cal Practice Excellence Committee

The Practice Excellence Committee is pleased to offer tips to help you increase your Collaborative cases and achieve *practice excellence*.



Please send us your comments and questions! Email us at info@cpcal.com

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How to Figure Out the Best Way to Start the Collaborative Process

Tip #1

Listen to your clients. As you listen to your clients, ask questions about what their concerns may be. What is most important to them? What is urgent and important? What can wait until later in the process? Assess whether emotional issues, communication, parenting, financial issues or other pieces are most important and time sensitive. The professional who is chosen as the entry point may be a clue. Be sure to suggest individual counseling if clients are in crisis or otherwise need more support than a coach will provide.

Tip #2

Refer clients to possible team members. Ask your clients about what they would want in a coach and a financial professional. Does the gender of the person matter? What approach would clients want the person to take? Give clients a few names for them to call to find the professional that fits the best.

Tip #3

Form the team and get early releases to talk. Compare information with your team members about the clients and what they need to address that is urgent or time-sensitive. Think of the team as in the ER doing triage - what to do first, second, and what can wait. If they need to address emotional issues/communication/parenting first, then set a plan to begin with coaching. If they need some temporary finances in place, then set a plan to get some basic information to the financial specialist and then meet with attorneys. Assess whether the couple can do things concurrently if

there are multiple issues to deal with quickly or if that might be too overwhelming for one or both of them.

Tip #4

Talk about pacing. Talk to your clients about how quickly they need or want things to be done. How much is realistic for them to do at a time? How much time do they have to devote to "homework?" Then talk to your team about setting a reasonable pace that meets the needs of the clients.

Tip #5

Make a plan with the team and the clients. The decision about where to start and how quickly to move forward is a joint decision. Share with the clients what the team thinks and why. Lay out a general process map from the beginning to the end of the process. Get the clients buy-in on the choice of starting with coach(es), the financial professional or with the attorneys or some combination.

Tip #6

Tailor the plan to the case. Each case is unique and one size does not fit all cases. Take into account your clients' needs and wants, as well as the input of the other party, and tailor your process for these clients.

Tip #7

Explore and manage client expectations. Understanding client expectations regarding the difficulty, duration and cost of their case at the outset of the process allows us to set realistic parameters that we can refer back to when challenges arise.

The Practice Excellence Committee wishes all in the Collaborative Community, and the families we work with, peace throughout the holidays and the New Year.



Stay Connected



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