

November 2017

# 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](mailto:info@cpcal.com)

[Click Here for Tips from Previous Months](#)



## How Do You Maximize Efficacy from the Role of the Financial Specialist?

**OR "Ask not what your financial specialist can do for you but ask what you can do for your financial specialist..."**

### Tip #1

**Role fidelity, both in and outside of team meetings:**

Clients do not understand where the boundaries are so it is incumbent upon the professionals to enforce this.

### Tip #2

**Early engagement:**

Client frustration will tend to be elevated when the financial specialist is brought in at any time other than the inception of the case if any expenses **have** been incurred by the lawyers working on gathering financial data.

### Tip #3

**Avoid "who gets what" discussions where possible:**

When the client says "I must get the house" acknowledge the concern and assure the client it will be addressed but refrain from advocating.

### Tip #4

**The FS should facilitate meetings, and adhere to the "Strong Neutral" concept:**

The FS should regard their neutral role as encompassing being guardians of the process.

### Tip #5

**Be on time for meetings and adhere to deadlines:**

Failing to follow through creates frustration for both clients and team.

### Tip #6

**Coordinate meeting agendas and keep the team updated between team meetings; follow the protocols:**

Involve FS in team phone bridges to discuss important issues, revelations and dynamics of couple and of the team.

### Tip #7

**Have a team agreement about when and how to address the issue of how the law impacts the case:**

Who should best provide the information, when is it best addressed and in what context.

### Tip #8

**Keep the FS in the loop throughout the drafting of the MSA:**

There is liability for all disciplines here.



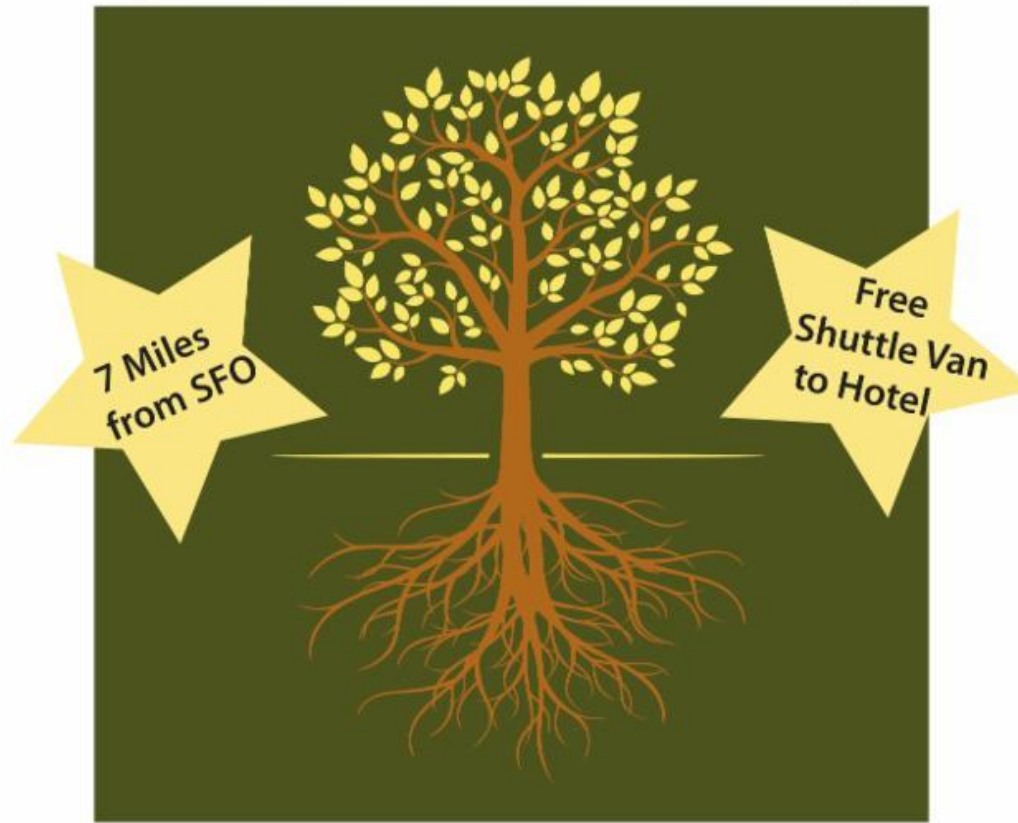
The Practice Excellence Committee wishes all in the Collaborative Community, and the families we work with, peace throughout the holidays and the New Year.

**SAVE THE DATE!**

# CP Cal Conference XIII

The Roots and Branches of Collaborative Practice

April 27- 29, 2018, San Mateo Marriott, San Francisco Airport



Join CP Cal at its 13th Annual Conference for an engaging weekend with Pre-Conference Institutes, Workshops, Fascinating Plenary Speakers, and Networking with the CP Cal Community!

Be sure to visit our website <http://www.cpcal.org> in January 2018 for more information and registration

For more information please contact Erin Keller at [erin@cpcal.com](mailto:erin@cpcal.com) or 415-399-8393



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CP Cal c/o 291 Geary Street, Suite 600, San Francisco, CA 94102 415-399-8393 [info@cpcal.com](mailto:info@cpcal.com)

CP Cal, c/o Erin Keller, 291 Geary Street, Suite 600, San Francisco, CA 94102

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