September 2018

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

Click Here for Tips from Previous Months

How to Keep the Cost of Collaborative Divorce Down

Five Things Clients Can Do to Keep the Cost of Their Divorce

1. Be responsive to emails.
2. Be responsive to scheduling requests.
3. Complete homework tasks on time:
    - Get documents to the Financial Professional early on.
    - Provide all documents as requested.
4. Do the research needed to make decisions as quickly as possible:
    - Talk to a mortgage broker about financing or refinancing.
    - Talk to a realtor about the value of the residence.
    - Review tax issues with an Accountant.
5. Explore emotional issues that may be holding back decision making with their Coach:
    - Grief/Anger over the end of the marriage.
    - Fear of dealing with financial matters.
    - Avoidance; hoping it will all go away or of getting back together.

13 Things Professionals Can Do to Keep the Costs of the Divorce Down

Coach (Reinforced by all team members):

1. Explore emotional obstacles that prevent client from taking action; unresolved grief over the end of the marriage, anxiety, anger/unfairness, etc.

2. Teach client coping mechanisms to deal with emotional regulation and organization.

3. Discuss with client how trust may be impacted if they do not meet their homework deadlines.

4. Help the client understand how managing their emotions and keeping their commitments will increase their sense of security, control, and their own integrity during the process.

5. Remind clients that the tasks to be done align with their own stated goals and interests as identified early in the process.

6. Discuss the differences in pace if one client is eager to move faster than the other. Explore ideas to manage these differences with the clients and the team. Try to find a pace that works for both clients.

Team:

7. Capture task responsibilities and expected completion dates in meeting minutes and distribute to all team members and clients. These will serve as reminders to the clients to get tasks done.

8. Designate a team member to follow up on each task.

9. Review the task list at the start of each meeting.

10. Recognize even small accomplishments to build motivation and momentum.

11.Track the progress and completion of tasks by the professionals and the clients.

12. Evaluate whether or not to postpone a meeting if not all homework has been done. Consider the cost effectiveness of postponing vs. meeting if insufficient data is available to move the agenda forward.

13. Remind clients of the difficulties in rescheduling meetings if homework is not getting done.

COLLABORATIVE PRACTICE CALIFORNIA

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