

## Interview Description:

This scheduled Zoom interview on October 19th, 2024, at 8 am aimed to get a general idea of what is important to an attorney when working with a company they refer clients. I interviewed my uncle Jay Shafer who is an attorney in Nevada. I used the guiding questions: Why do you refer clients to certain companies? What can a company do to stand out? What is the best way to start a relationship? Jay was a convenient sample, but was also strategic because I knew I would get honest candid answers and feedback from an attorney. I knew that Jay was a talker, so I only planned to ask a few questions with follow-up questions as needed.

## Themes & Summary

### Main Categories

Four main categories emerged when reviewing this interview: Convenience Factor, Tangible Items, Cost, and Nourishing Relationships

### Convenience Factors

**"Attorneys have a lot of things going on, and so the more you can do to facilitate a no drag relationship, the better it's going to be..."**

Jay had many general ideas about a company can be convenient to work with such as online portal, quick responses, proactive in giving information, flexible rates, reliable, easy documents, plaintiff friendly, easy scheduling, and extended hours

### Tangible Items

**"This is the one thing I use, and I use this almost every day, it is a date calculator"**

When I asked about tangible items I got a wide range of responses from notepads, stickers, office snacks, durable and useful, not clothing, and date calculators. It was made clear that if you give something tangible it should either make their easier, i.e. a date calculator or bringing in breakfast.

### Costs

**"If you are willing ... to compromise your rates a bit, they they'll probably [be] more likely to give you the next"**

You do not have to be the cheapest person for them choose you, Jay even commented that "if he's double, I probably don't care, because it's getting paid out of the lien. Being flexible with your rates goes a long way with an attorney and they will return the favor in the future. In the end it still needs to pencil out for both groups and make it mutually beneficial.

### Nourishing Relationships

**"I don't usually pick who they are. My paralegal picks" "it's sometimes the little touches"**

Throughout the whole interview everything seemed to come back to this idea of relationship building even though it might be superficial. It is about getting to know the person and then doing something with that knowledge to help them out.

## Analysis

Jay could not speak specifically to chiropractor attorney relationships, however the knowledge he shared about convenience factors, tangible items, cost and relationships all fit together to have the best working relationship. When giving a tangible item give thought as to why such thing would make the attorney's job more convenient. Having flexibility in cost also make you convenience to work which creates a pavlovian response.

## Interpretation

During the analyzation process, it became clear that the categories started to become ordinal phases that need to be constantly nourish starting with tangible item to get in the door, then convenience factor and cost, ending with relationship. This can be accomplished by first, giving of tangible item that shows you understand their business. Second, is to become convenient to the attorney being assumptive of their needs and being flexible on cost. Lastly, Nourishing the relationship by continuing to be convenient to work with, giving tangible item, and being flexible on cost.

# Transcript Sample

## Jay Shafer 8:15

See where they're at. It's also helpful to talk sometimes to the paralegals. I don't usually pick who they are. My paralegal picks, and so sometimes ill obviously tell her where to go, but so the court reporting companies come to paralegals and they bring donuts and, you know, bagels and other stuff to try to get them to come and make their job easier. The gatekeeper or the decider for that type of thing would be really important.

## Bo Jackson 10:07

Does cost play a large part on your choice?

## Jay Shafer 10:59

When you are treating on a lien, when you're doing that, you can jack up your rates, so instead of \$100 for an adjustment you would charge \$250 yeah. Now that doesn't mean you're actually realizing the \$250 right? You know, because sometimes, if you're treating on a lien, you may take two thirds of what you're owed, but two thirds of \$250 is more than \$100 correct? Its really that biggest thing, that you are easy to work with for the attorney, because attorneys have a lot of things going on, and so the more you can do to facilitate kind of a no drag relationships... your hassle free on your billing.

## Bo Jackson 16:45

He's wanting to think of something more memorable so that they attorney, when they're working with a PI case they can remember him over the 50 other people say who that have tried to network with him. What are some things that people have done that are memorable? Or what can they do that would be memorable to you to make you want to refer them?

## Jay Shafer 17:37

Something that's going to be durable, as far as remembrance is useful. Like notepads, I've got a really good one on my desk. Oh, this is the thing I use, and I use this almost everyday, it is a date calculator.... it's sat there for 10 years, and so I constantly see them for that.

# Interview Guide

This interview guided was adapted to be as general as possible in order to meet the interviewee where he was. Having a prior relationship with the interviewee, I knew that he would not need much prompting and that his answers would be thorough, and I just needed to guide him gently with a few follow up questions. This approach allowed two things, a new perspective and honest answers.

- When a company comes to you, what do they give you that makes them stand out?
  - Do you have an example?
  - What is something you do not like to receive?
- Besides a physical object what helps determine whether or not you will work with them?
  - Ask to expound on something he said?
- Does cost play a large part on your choice?
- How do company's typically first reach out to you?
- How do you decide who you refer people to?
  - Is there a red flag that turns you away from a company?
- Do you ever give the swag you get to your clients?
- If you were a company coming to an attorney, what would you do?



Interviewed by Bo Jackson

# Affinity Diagram

Memorabilia	Cost	Who	Working with
<ul style="list-style-type: none"> <li>• Lunch not necessary</li> <li>• Little touches</li> <li>• Bundt cake, cookies, bagels</li> <li>• Not Swag</li> <li>• Notepads and date calculator</li> <li>• Practical over anythingelse</li> </ul>	<ul style="list-style-type: none"> <li>• Elastic Pricing</li> <li>• Working with lein</li> <li>• Compromise on your rates</li> <li>• 2x is not problem</li> </ul>	<ul style="list-style-type: none"> <li>• Plaintiffs</li> <li>• Paralegals are often gatekeeper</li> <li>• Conventions</li> <li>• Associations</li> </ul>	<ul style="list-style-type: none"> <li>• Making their work easier</li> <li>• Being assumptive of needs</li> <li>• Understand their work</li> </ul>