**Cultivating the Collaborative Professional-Client Relationship: From First Contact to Engagement**

**A Workshop Presented at**

**International Academy of Collaborative Professionals**

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**By**

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**LEARNING OBJECTIVES**

From the first phone call, clients receive direct and indirect information about how you can help them with their divorce. The language, listening skills, questions asked and structure of your intake all indicate to the client which options are viable to them. Honing in skills in these areas will increase your Collaborative cases. Participants who take this workshop will be able to:

1. Identify the areas of their intakes focused on cultivating traditional clients versus collaborative clients, to enable them to make adjustments to their intake processes to increase opportunities for collaborative cases.
2. Apply specific questions and listening skills to their intake and initial consultation processes to increase their collaborative cases.

**WORKSHOP AGENDA**

1. Good Morning and Welcome!
2. What “Intake” IS and is NOT
3. Introduction to an Intake Process Model
4. Client-Driven Process
5. Forks In the Road
   1. Suitability
   2. Screening
   3. Convening
   4. Retention/Engagement
6. Initial Phone Call Intake
7. Initial Consultation Intake
8. Listening for Understanding
9. Questioning on Purpose
10. Client Intake Tools
11. Client Aids

**Brief Biographies of Each Presenter:**

Kathleen Zumpano, MA, LMFT is a licensed therapist, mediator, Collaborative practitioner, and professional trainer who has focused her practice on assisting families during and after separation and divorce. Kathleen has presented at panels and workshops for Second Saturday, Collaborative Professionals of Washington, Oregon Counseling Association, Lewis & Clark Law School, Collaborative Professionals of California, and International Academy of Collaborative Professionals. She is currently President of Oregon Association of Collaborative Professionals. See [www.kathleenzumpano.com](http://www.kathleenzumpano.com).

Nancy Retsinas is a collaborative lawyer and mediator in Washington and Oregon, in private practice since 1991. She maintained a traditional family law practice while also working in the collaborative model while until January 1, 2015, when she stopped accepting litigation matters altogether. Nancy has been training professionals in client-centered dispute resolution methods (family law ethics, collaborative law and mediation, unbundling, lawyer as peacemaker) since 2008. She is currently on the board of Collaborative Professionals of Washington (board treasurer). She is a contributing author to Washington Practice Manual – Family Law, a West Publication (2016). See [www.nancyretsinas.com](http://www.nancyretsinas.com).

Nancy and Kathleen have formed a co-mediation team, preferring to work with parties in the “conjoint mediation” team setting. They often work together as members of a collaborative divorce team. In 2015, they co-founded Two Rivers Institute for Dispute Resolution with two themes in mind; first, to deliver quality collaborative practice and team-building training for professionals in their region; and second, to develop and cultivate a learning community of like-minded professionals, across disciplines, who learn consensual dispute resolution methods together.

Kathleen and Nancy are both contributing authors in Mosten and Cordover’s book Building A Successful Collaborative Law Practice (2018). Kathleen authored a chapter on use of child specialists in collaborative law. Nancy co-authored a chapter on use of behavioral health specialists in family law. They are both members of Peacemaking Practice Trainers, a collective of cross-disciplinary trainers across North America.