Hours / Slide #	Presenters	Content
0:00AM Slide 1	George	Welcome – Good Afternoon! Color code: Blue = Lawyer; Green = financial specialist; Yellow = mental health professional Intro Presenters – Cell Phones on Stun – Acknowledge expertise and experience of participants. Confirm that each table has at least one financial specialist and mental health professional. Learning Objective: Practical steps to enrolling clients and their spouses into a Collaborative Practice file **Cathy** walk through percentages of practice dedicated to Mediation/litigation How many of your mediations do you later wish were collaborative
0:10AM	George	Journal Exercise on Prof Bias re Collab - Your own concerns about collaborative (re believing in the product to effectively market.)
0:20 Slides 2&3	Cathy	How do we attract collaborative clients? ❖ First contacts - mixed messages bring mixed clients - **Cathy** ➢ What is the message you are delivering about family-focused divorce processes though marketing and professional contacts? ➢ Professional websites, social media, blogs, etc. ➢ Referrals / Pre-existing relationships ▪ **Diana:** Legal Ethics ▪ Education by mental health professional and financial specialist ➢ How can divorce workshops educate potential clients about family focused divorce options? ➢ Need a good product, need to have knowledge about that product, need to believe in the product, and you need to understand with the client needs (active listening)
0:30 Slide 4 Slide 5	Cathy Carol Scribes	FLIPCHART What do you find to be the biggest obstacle(s) to enrolling a potential Collaborative Client? What do you find to be the biggest obstacle(s) to enrolling Client's Spouse?
0:35 Slide 6, 7, & 8	Carol	Reframing what the clients say are their goals – Education about what reframing is and how to do it - Doonesbury

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0:40 Slide 9 & 10	Carol	Education by presenters about the modalities whereby people learn: seeing (visual), hearing (auditory) and (kinesthetic) Instruct participants to consider which professions tend to use which modalities and why as they watch
0:45AM Slide 11-27	Diana	First client Meeting presentation – Goals for the professional Start the reframe from the outset. Remove "settlement", "child custody and visitation", and "child and spousal support" from your vocabulary. These are tough questions that need to be resolved. **Refer to Anchoring** Have the spouse/partner/parent consider their own goals – forward looking. Legal Ethics: Diligence/ Communication with Clients Setting the client up for success Be clear and direct. Active listening to determining where there may be struggles General education about what the state requirements Process options – be transparent on pros and cons
1:05 Slide 28	Carol Sets Up Demos: Each	Demo initial orientation/consult from perspective of Coach & ChS / Lawyer / FS: **This is a very brief snippet of what is typically 90 minutes to 2 hours.** Set anchors at the beginning of every meeting. Think about your prof goals for your clients (anchoring). Set the expectation of the meeting: Review the initial goal setting with client to get information re Client goals which allows transition to discussing collaborative practice and how it will support the client in the role play: • Kids • Cost • Fair allocation of assets / debts • Fair allocation of income **George with Cathy: Cost; Child / Spousal support guidelines; Litigation: plus / minus; Why not Mediation? Plus / Minus** **Cathy with Carol: Cost; Already have CPA/CFP; "Fair" allocation of assets, debts, income;** **Carol with Diana and Cathy, Coaching - Focus on purpose of coach when we already have a therapist - both spouses seem to support continuing to work with their joint therapist.**

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		BREAK
1:45AM	George	Debrief the three demonstrations: What did participants notice was the *same and different among the different disciplines; Different from what they do?* *Summarize with Slide 21*
1:50 Slide 29, 30, & 31	Role Play George Sets Up	*(Instruct participants to notice how each demonstration may be the same, may be different, and may be the same or different from what each participant does. If an odd number at table, double up on mental health professional)* At each table, participants role play what they saw in the demonstrations
2:20 Slide 31	Carol	Debrief the role plays by each profession: Child Specialist, Coach, Lawyer, Financial Specialist
2:30 Slide 32	Cathy	At each table: discuss your understanding of the role of the professionals **NOT OF YOUR OWN PROFESSION** Cathy solicits comments from participants.
2:45 Slide 33	George	Q & A
		LUNCH
3:45PM Slide 34	Diana	Ethical considerations in enrolling the spouse: list on flip chart .2 Ethics In all fields
3:55 Slides 35-45	Diana	Brief review of relevant statutes and how they may impact how we present information to the spouse .2 Ethics
4:05	Carol	Ethical considerations in enrolling the spouse: list on flip chart.
4:15	Cathy	Ethical considerations in enrolling the spouse: list on flip chart.
4:25 Slide 46-47	Cathy sets up Demos: Each	Demo initial orientation/consult from perspective of Coach & ChS / Lawyer / FS: *(Instruct participants to notice how each demonstration may be the same, may be different, and may be the same or different from what each participant does.)* Time to problem-solve with client. Maintaining Neutrality for N2PCS/NFS

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		Ethical considerations: George / Carol: Describe best practices regarding professional rules of ethics and conduct when educating clients about Collaborative Divorce ➢ Do not intentionally interfere with existing representation. ➢ Consequences of working with an untrained lawyer. ▪ Practice protocols: discourage working with untrained in Collaborative Practice principles and interest-based negotiation. ▪ Even if other lawyer is settlement oriented, tends to "friendly" settlement conference. ▪ Does not serve the client well. ➢ Direct contact with other spouse when known to be represented ➢ OK to educate and offer materials to Client to educate spouse. ➢ Spouse, if chooses, may substitute a collaborative lawyer into the matter ❖ Contact other lawyer directly? ➢ Reputation within the community. ➢ Do you try to convince the other lawyer to go collaborative? ➢ Do you do a "collaborative" case with an untrained professional? ➢ If the other lawyer won't agree, do you stay in the process? **Carol with Diana and Cathy: Role play with Client. Is Client clear about reasons for choosing Collaboration?** **What are your Client's fears / concerns in approaching spouse?** **Cathy with Carol: Role play with client.** **George with Cathy: Role play with client.** Remember the rule of three times. When they say it 3 times, it's important to them. Participants role play what they just saw on educating the client on how to enroll their spouse. Add a slide that includes the talking points: - Cost - Pauline Tessler article; t/c conference; meeting with NFS - Kids - An area of agreement? Agree on everything on the children - voice for the kids in Collaborative - Difference between mediation and collaborative - Communication: how's it been working so far - coaching. Reality check. - Are you able to solve problems together. - Other TBD

Hours / Slide #	Presenters	Content
5:05PM Slide 12	Cathy	Debrief the demonstrations: What did participants notice was the *same and different among the different disciplines; Different from what they do?* ***Set up Role Play. Transition with Slide 12***
5:15 Slide 12	Role Play	At each table, participants role play what they saw in the demonstrations
BREAK		
6:15	Carol	Debrief the role plays by each profession: Child Specialist, Coach, Lawyer, Financial Specialist
6:35		Q&A
6:45	All	Review flip chart from beginning of training about obstacles to enrolling clients and spouses
7:15	Everyone	Hugs and Kisses; Go Home.