



Workbook



Activity 1

Write a list of the marketing materials you have to engage collaborative clients.

What does your website say about collaborative practice? What are the key messages?

What steps do you/your staff take to welcome collaborative clients?

When they call your office	When they make an appointment	When they stop by your office or come for the first time.



Activity 2

After watching Geoff Ramm 'Celebrity Service' video. Write down 3 improvements you can make to give your potential collaborative clients a better experience.

Activity 3

Draw a map of how your collaborative cases run. Include the main steps and pathway to settlement, noting down what happens at each step and who is involved.

When and how is this information shared with prospective clients?



Activity 4

What does your 'intake' look like? Who is involved? How is the information shared amongst the team?.

How do you determine the scope of the collaborative case?



Activity 5

What expectations do you have of yourself and your collaborative team members?

Timeliness	Communication	Responsiveness to you/the clients
Other		

How do you know if your team members have the same understanding of expectations?

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How are expectations and responsibilities communicated to all team members?

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Activity 6

Who do you go to if there is an unexpected glitch in your collaborative case? How is this communicated to other team members?

List 3 ways that case management keeps the case in process and on track.

Identify 3 ways that case management contributes to team harmony?



Activity 7

What tools and technology do you use to manage your collaborative team and cases?

Activity 8

Write down 3 ideas you can take away and use in your own practice.

What are you going to do differently or what improvements can you make?



Homework

Review the MELCA website. What do you like about it? What needs to be improved? Please feel free to send your suggestions to anne@melca.com.au.

Find 3 websites that you think are good at attracting collaborative clients.

What ideas have you found for your website that will increase the appeal of collaboration to potential clients?

Review your own website in the light of what you have learned.