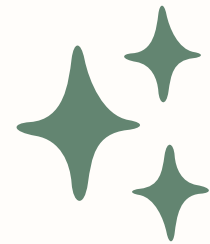




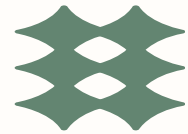
# Turning Clients Into Advocates

With Proactive  
Communication



## HONA PLAYBOOK

# Introduction



Based on 3+ years of working with hundreds of plaintiff attorneys, here's what we've learned about turning clients into advocates – all by proactively initiating **personal communication** and interactions.

If these **5 strategies and tactics** feel obvious to you, good. They're not earth shattering. But that means you need to perfect your execution.

## THE STRATEGY

# Do proactive communication, not just reactive

## THE TACTIC

Most client calls happen because they think you've forgotten about them.

When you *communicate first*, you eliminate 5 future pain points they might have called you about tomorrow (and the next day).

Reach out every 2-3 weeks with case updates (even "no update" updates), so clients worry less about needing to call you.



**THE TACTIC**

# "No update" updates



**Intake confirmation**

**Medical records collection phase**

**New client onboarding**

**Negotiation phase**

**Treatment phase**

**Appointment reminders**

**Birthday messages**

**Approaching settlement phase**

**Document confirmation**

**Post-case follow-up**

## THE STRATEGY

# Match communication frequency to anxiety levels

## THE TACTIC

Not every phase requires the same outreach. When you're negotiating settlements or clients are waiting for critical decisions, increase your touch points. During routine phases, like medical record collection, you can space them out more.

For example:

- Negotiation phase: Weekly updates
- Medical records phase: Every 3 weeks
- High-anxiety clients: Custom higher frequency



## THE STRATEGY

# Give your team the right tools to sound smart

## THE TACTIC

Create an internal wiki or FAQ cheat sheet so *anyone* who answers the phone can give intelligent responses. Build message templates that can be inserted automatically into text message threads as well.

Some firms are even feeding this documentation into ChatGPT agents for instant receptionist support.

This way clients get answers in minutes, not days, and your team doesn't get caught off guard when asked basic questions.



## THE STRATEGY

# Avoid the dreaded 24-48 hour response time 😬

## THE TACTIC

"We'll get back to you in 24-48 hours" may sound reasonable. But to clients, it's forever.

People expect responses within hours from every other business they interact with. Why would you, the person helping them in a stressful situation, be any different?

Build response time blocks into your team's schedule. For example, 15 minutes every hour gets dedicated to calls, emails, and texts.



## THE STRATEGY

# Build a referral engine well after cases end

## THE TACTIC

Let your former clients become a referral engine. But you have to stay connected.

Keep in touch by automatically sending birthday videos to every former client. Or send quarterly "check-in" texts to your database of closed cases.

Similarly, request reviews every time a case reaches an ending phase.

^ Real things that firms do to stay connected to the very end (and beyond).





## HONA PLAYBOOK

# Now what?

Time to get to work! But that doesn't mean you try to implement all of these strategies at once. Pick one area, maybe two, to focus on at your firm.

Then, outline your plan for how you and your team are actually going to make it happen. Determine who is handling different steps in each process and ensuring your new tactics get implemented smoothly.

After a month or two of trying a new strategy, evaluate how things are going. Determine if changes need to be made to those new processes. At the same time, decide if you're ready to implement additional strategies.

### PRACTICAL TIPS FOR IMPLEMENTING THESE STRATEGIES:

- **Communication:** Ensure the chosen strategies are communicated clearly and consistently to all relevant team members.
- **Actionable Plans:** Break down the chosen strategies into actionable plans with specific tasks, deadlines, and responsible individuals or teams.
- **Team Buy-In:** Secure support from the team members responsible for the day-to-day execution of all tactics. Together you must champion the strategies to inspire commitment throughout the firm.

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