ISSUE SPOTTING & CASE MANAGEMENT

ABOUT ME

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What do these terms mean?

Issue Spotting

Case Management

ARE THESE ISSUES CONNECTED?

THE ANSWER?



CLIENT COMMUNICATION

Working with Clients



CONFUSION ABOUT LEGAL ISSUES TROUBLE WITH CONSISTENT COMMUNICATION

FRUSTRATION WITH PROCESS

Working with Clients with Trauma



Trouble focusing



Missed deadlines



Fear of obtaining assistance



Practice Tips: Be accommodating and keep communication open and often **ISSUE SPOTTING**

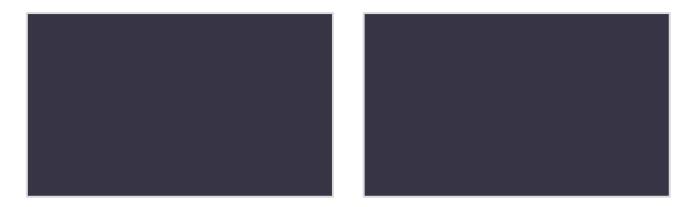
Hypothetical

- Hypo: Client calls because she is seeking assistance for repairs for her home. The agency is telling her she doesn't own her home, but she purchased the home with her husband who passed away about 6 months ago. Client is confused because she believes she owns the home now.
- You look into the deed records and you learn that she and her husband are both named on the deed, and there is a remaining lien on the property. You also check the tax office, and learn that there is a tax debt of \$5000 pending.
- What legal issues does client have?

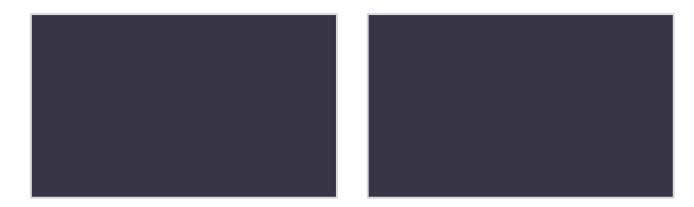




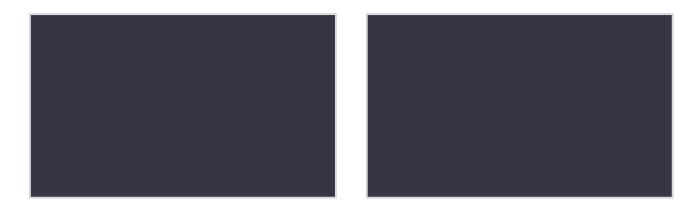












Title clearing

Release of lien

Tax issues

Estate planning for client



Title clearing

Release of lien

Tax issues

Estate planning for client Working to get disaster assistance

Issue Spotting



TALK TO THE CLIENT

GO IN DEPTH INTO ISSUES

THINK OUTSIDE THE BOX



KEEP THE GOAL IN MIND

IT GETS EASIER

CASE MANAGEMENT

LEARN WHAT WORKS FOR YOU

General Top Tips

Regular case reviews

Don't take too many cases! Do tasks yourself the first time

Learn how to delegate

Talk to your client often

How to Prioritize Cases

Squeakiest wheel gets the grease?

Keep track of deadlines

Don't let cases get stale

Time Management

Bullet Journal

Weekly to do list

Online task manager



COMMUNICATE WITH YOUR CLIENT

IT GETS EASIER

QUESTIONS?