

## FRICHOT LAWYERS CASE STUDY

Natale Ricciardi



### Challenges

- Time-consuming client data collection hindered advisement.
- Unprepared PNCs led to extra and costly consultations.
- Poor PNC readiness led to frustration and potential client loss.

### The Settify Solution

#### Time Savings + Efficiency = Value

Settify streamlines PNC delegation, enabling our team to focus on preparing actionable advice. Efficiently preparing lawyers and PNCs for Introductory Consultations maximises the opportunity to deliver enhanced value through well-thought-out strategies. Together this significantly boosts the likelihood of converting PNCs into long-term clients.

#### Enhanced Solicitor-Client Matching

Our receptionists serve as the bridge to Settify, guiding PNCs through the process. The Settify Executive Summary and relevant information are shared with the PNC Delegators Group, who then select the most suitable lawyer for an effective Introductory Consultation.

Frichot Lawyers is a full-service law firm with exceptional capabilities in the areas of family law, wills and estates, and succession and estate planning. The team of highly skilled solicitors are committed to resolving complex legal issues by providing clients with innovative, efficient and responsive solutions.

"Settify is more than just a tool; it's a catalyst for the efficient allocation and preparation of PNCs. By capturing and preserving the initial instructions, it empowers us to conduct a valuable Introductory Consultation, enhancing our ability to convert PNCs into valued, ongoing clients."

### Positive Client Feedback

Most of our clients have positive things to say about using Settify. In particular, they feel prepared for the Introductory Consultation. Our receptionists explain that completing Settify will result in better value and more specific advice at the Introductory Consultation if they complete the induction questionnaire to the best of their ability in their own time.

*PNC = Potential New Client*