

A Solution to Streamline Chapter 7 and 13 Bankruptcy Law Firm Operations



Colorado Bankruptcy Training
training and support for bankruptcy attorneys nationwide

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When a consumer is interested in filing bankruptcy, they will normally contact a bankruptcy attorney in their area or simply walk into their office with no prior appointment. The average consumer will also want to know how much it will cost to file bankruptcy, at which time the attorney must gather enough information about their financial situation to provide a reasonable quote for services. The majority of attorneys do this by providing a free initial consultation.

Unfortunately, this method is proving to be extremely unsuccessful for many Chapter 7 and Chapter 13 bankruptcy attorneys. For example, a small law practice in Denver, Colorado recently said that she often only converts 2 out of 10 free consultations to actual bankruptcy clients who retain her services. This is a great loss of time and money; in fact, about 80% of it.

Another attorney in Los Angeles, California said that he spends about 25 hours of free consultations per week to average 3 new clients who pay a retainer. And still, another attorney in Phoenix, Arizona said that he is spending so much of his time with free client consultations that end up resulting in a total loss of income, that he has little time to dedicate to clients who have retained him. He is considering hiring an in-house attorney or law student but is afraid he cannot afford it right now.

Problems like these, and thousands more like them are not uncommon in the average Chapter 7 and 13 bankruptcy office today. However, attorneys are finding the necessity to streamline operations just to keep up with the increased workload within the bankruptcy industry itself. They no longer can afford to spend 3, 4 or more hours per day interviewing clients, only to find out they either are ineligible to file bankruptcy; or even worse, to discover there are potential problems that

may cost more time for the attorney or paralegal that were not anticipated during the initial client meeting.

A	Proposed	Solution
The Initial Intake Form, a tool recently developed by Colorado Bankruptcy Training, is designed to enable law firms to meet these time saving goals as well as accomplish much more.		

The Initial Intake Form is a 4-page form that is basically comprised of yes and no questions. This makes it very simple and fast for potential client(s) to fill out and complete either at the law firm or over the internet by accessing the law firm's website. The information gathered from these yes and no responses is designed to be simple and fast for the attorney to interpret also. This is accomplished through the extremely detailed, 75-page Operations Manual that comes with the package.

In order for the Initial Intake Form to provide maximum benefits to bankruptcy law firms, the form is provided to attorneys in the following formats:

1. The HTML version is designed to fully integrate with the existing law firm website. Potential clients visit the website, fill out the form and the responses are automatically emailed to the law firm. The attorney interprets the answers from the form and if the attorney decides to take the case, contacts the clients to schedule an appointment to sign the Retainer Agreement as well as conduct the client intake interview.
2. The Adobe Acrobat version is form fillable; meaning that it can be completed online from the law firm website as well or any computer in the office. The PDF form is also fully customizable so that it can be made to comply with internal law firm operations.
3. The Microsoft Word version is also fully customizable and can be opened by both Word and WordPerfect users.

As previously mentioned the main heart of the package is the extensive, 75-page Operations Manual that helps the bankruptcy law firm to quickly and easily alter their present operations in order to achieve the following goals:

Goal	No	1
The first major goal of the Initial Intake Form is to provide the attorney with enough information so that he or she can more accurately project the figures for Schedule I and J of the bankruptcy petition. This will enable the attorney to more accurately determine the complexities of the case as well as the possibility whether this case will most likely become a Chapter 7 or 13.		

Goal	No	2
The second goal of the Initial Intake Form is to provide the attorney with		

enough information to ascertain the complexity of the case by examining other areas outside the financial method discussed in Goal No 1.

Goal **No** **3**
The third goal of the Initial Intake Form is to provide the attorney with enough knowledge to reasonably give the client(s) a more accurate fee quote.

Goal **No** **4**
The fourth goal of the Initial Intake Form is to cross-reference responses from other questions to ensure the information provided by the client(s) is consistent and accurate. This allows the attorney to maintain better due diligence which is a requirement under the bankruptcy code.

Goal **No** **5**
The fifth goal of the Initial Intake Forms is to assist in streamlining intake operations. This is important today because of the massive growth of the debtor bankruptcy field. Old methods that used to work no longer work because of the fast moving needs and requirements within the industry itself.

To find out more and watch a product demo VIDEO about the Initial Intake Form Kit, visit: http://www.coloradobankruptcytraining.com/products_intakeform.html

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