

THE PROVEN RESULT

250% INCREASED REVENUE

From stalled growth to 7-figure gains. How Claims Management Inc. (CMI) a paralegal company increased revenue by 250% in just **36 MONTHS.**



FROM FRUSTRATION TO THRIVING

Inconsistency, high turnover, and client frustration... CMI (Claims Management Inc.) had stalled.

For more than 30 years, Claims Management Inc. had made a name for itself in Washington state as a highly successful firm providing paralegal services for personal injury attorneys.

CMI had plenty of work, caseload wasn't the problem. They were struggling with a major plateau. Although everyone worked extremely hard, infrastructure and growth systems were not in place

to handle continued growth. Lack of strategy was also causing frustration, dysfunction, and delay.

Due to this and the absence of a training program, there were gaps of knowledge and onboarding new staff wasn't effective. This impacted CMI's attorney clients.

Like many companies, CMI relied on a single employee to pass down their knowledge to new hires. No documentation. No set processes. Just new hires frantically scribbling notes as the trainer explained how to do something.

Year to year, CMI averaged about 35% turnover. Frustration grew - from both the trainer, and the rest of the team. Employees were discouraged and burnt out, leaving at a sky-high rate, greatly impacting CMI's bottom line due to the expense of training new employees, only to see them leave a few months later.

This wasn't just an internal issue, morale declined and the churn of new team members impacted CMI clients. Attorney clients expressed frustration due to a lack of follow-through and broken communication. Efficiency was also a huge issue which caused 3 month delays (*average should have been 9 months, but would take as long as 12 months*).

CMI had grown into an industry giant in the region because of its competence and hard work. But without consistency across its processes, their team members were working themselves to the bone—while still coming up short in the area of quality and timeliness. The organization's growth had reached a ceiling that owner Dave Brower wasn't sure how to bust through.

Dave envisioned CMI at the next level, he just didn't know where to start—and needed help getting there. They wanted to increase and diversify their revenue. At that point, 80% of their income was coming from a single law firm, so diversification of their revenue stream was critical.

They also wanted to get their turnover rate under control and establish organization-wide consistency to ensure better service and team morale. Consistency would help CMI move through a heavier caseload in less time.

Feel like you're too busy to slow down and create critical systems & processes?

You can't afford not to. I can help!

THE MYTH

HARD WORK = SUCCESS

CMI was neck-deep in the common myth: hard work alone will be enough to get to the next level. Leader's Edge debunks this myth very often.

CMI had a hard working team, in fact, that was part of the issue. They were working so hard, they were burning out and leaving the organization; forcing CMI to start from square one, way too often.

They'd tried just "throwing bodies" at the problem: If Person X didn't last at the organization, maybe Person Y would figure it out. But that's not a sustainable strategy—especially if a company wants to rapidly grow. All in all, it was time for a smarter, more effective way to work.

CMI REACHED OUT TO LEADER'S EDGE.

Too many companies attempt to scale by simply muscling through more and more work—the "sledgehammer" approach. With a sharper ax—and a smarter way to work—you can take down five trees in the same time it previously took you to cut one. That's the principle we started from with CMI.

Sharpen the ax, and less work is needed.

Abraham Lincoln once said, "Give me six hours to chop down a tree...

and I will spend the first four sharpening the ax."

The company needed consistent systems and processes, so they could provide the best possible service to their clients, work more efficiently, and enable employees to have a smoother work experience.

ONBOARDING & TRAINING

That consistency needed to start with CMI's onboarding and training processes.

Using the Efficiency System of Leader's Edge Performance Engine, we worked on consistently honing the way they handle cases. The massive backlog of checklists was whittled down as the intentional focus became **"Quick & Compassionate. Fast & Friendly."**

To take the pressure off Dave and Jordan so they could break free from day-to-day operations, we implemented our Team-Building System. Sixteen emerging team leaders were put in place to create a core leadership team.

CMI was equipped to scale its growth—no longer reliant on one or two people gate-keeping knowledge. Documenting everything, leaders now had a standard leadership development program to go through, and every new employee completed the same, consistent onboarding process.

ACCOUNTABILITY

We also worked with CMI to build an Accountability System—individual success trackers for every employee to measure their performance and make sure the whole team was meeting the needs of both the attorney partners and their injured clients.

These success trackers have become integral components in their new team reporting process and have been the catalyst for growth. As we say, **"What's inspected is improved."**

THEY DOUBLED TEAM SIZE, 100%+ GROWTH IN CASE LOAD, AND 250%+ GROWTH IN REVENUE.

With improved internal systems, more prepared team members, and an accountability system to keep everyone on track, CMI started seeing results almost immediately.

Before starting with Leader's Edge, only about 75% of their hours were billable from week to week. After they started measuring their paralegals' "efficiency rate" via their new Accountability System, each employee was empowered to monitor their billable hours, **jumping from 75% to 100% for most team members (some even surpassing 100%).**

NOW, THE TEAM WAS GETTING EVEN MORE DONE IN THOSE BILLABLE HOURS.

Robust Onboarding & Training Program

Leadership Development Protocols

Defined Department Leaders

With these key systems in place, the entire team spent less time feeling confused about how to do something—or worse, doing something differently and creating an inconsistent experience for a client.



THE BOTTOM LINE



BETTER SERVICE

Staff Retention & Increased Revenue

The drop in turnover and increased attention to consistent training made it possible for entire paralegal teams to be assigned to specific law firms. This results in CMI's "attorney partners" receiving better service as their assigned team of CMI experts retain institutional knowledge about the client's specific firm.

Meanwhile, "injury clients" receive a better experience due to processes in place to ensure clear communication and information sharing.

With all the internal improvements, CMI's turnover rate declined quickly. Within three years, it dropped from 35% to 8%. The company also doubled its team, directly expanding its ability to take on more cases.

The impact to CMI's bottom line was huge! Caseloads went from **roughly 136/month to 304/month, enabling a 250% jump in revenue** within three years.

These days, CMI continues to grow at about 40% year-over-year. Heavier caseloads no longer come with the same disorganization, delay, or frustration of years past. Due to **more efficient systems in place, robust training & leadership programs, consistency in processes, and diversification of income streams...** overall they are a happier, more effective team—equipped to handle the pace of growth.

Dave and Jordan have extricated themselves from the weeds of day-to-day operations and now spend their time strategizing, and in the community meeting new prospective attorney partners. Their work-life balance has skyrocketed now that they know CMI is running like a well-oiled machine—whether they're in the office or not.

A WAITING LIST

With CMI daily operations running more efficiently, Dave and Jordan were freed up to get out into the community more and expand their market.

The law firm that **previously accounted for 80% of CMI's income now is at less than 33%**—and CMI's client base is much more diverse. They now have a waiting list of law firms that want to use their services.

Too many companies spend years spinning their wheels, just trying to muscle their way through a plateau, just "working harder." **That is not an effective strategy for scaling your business, eliminating stress, streamlining operations, or establishing more financial freedom.**

Leader's Edge Performance Engine IS the strategy that will help you get there. Our proven system will help your organization by optimizing the six major business systems for long-term, sustainable growth, **just as it did for CMI... the results will be life-changing!**

OUR APPROACH

SIX POWERFUL SYSTEMS

LEADER'S EDGE



PERFORMANCE ENGINE

LEADER'S EDGE PERFORMANCE ENGINE consists of six powerful systems that will reduce your stress, scale your business, build your team, and earn greater profits. Below is a brief overview to give an idea of what our first twelve (12) team workshops will cover.



PURPOSE

The Foundations System: Strengthening your organization's purpose. This connects the "Work with the Why" and brings far greater alignment to your team. In these sessions we will work together to create or improve your powerful Vision, Mission, and Core Brand Value Statements. This helps create deeper meaning in the organization and helps solve the alignment problem many organizations face. These powerful statements will also be used later in your messaging and marketing strategy.



PEOPLE

The Team Building System: Empowering your organization's people. We teach you how to nurture your people so you can attract and keep top talent. In these sessions, we will document your hiring and onboarding process along with "Seat Descriptions." This brings great clarity and alignment to the team. We also do assessments to help your team understand each other better.



PLAN

The Strategy System: Your organization's overall plan. 85% of companies don't have a documented scalable strategy. We will generate a plan that focuses your energy on growth. Only 5% of businesses have a documented business strategy. In these sessions we will work together to create and document your value proposition and your entire value chain. This offers incredible understanding of your target market and how best to reach them and serve their needs. This helps solve the focus problem.

FUTURE GROWTH

SIX POWERFUL SYSTEMS

LEADER'S EDGE



PERFORMANCE ENGINE



PERFORMANCE

The Accountability System: Your team's performance. We will show you how to ignite your team using our proven "Success Trackers." A small percentage of companies have Key Performance Indicators (KPIs) in place to help each team member perform well and hit their goals. In these sessions we work together to create these systems and teach how to use them. This will greatly impact performance and is one of the most result driven tools we offer. "What's inspected is improved."



PROCESS

The Efficiency System: Nailing down your organization's processes. We will examine, create or improve your organization's key systems and major processes to ensure they are efficient, running smooth, and well understood. This will create consistency, predictability, and profitability in your team's work. This will help solve your productivity concerns and challenges.



PROFIT

The Financial System: Your organization's profit. Clarifying pricing, expenditures, and forecasting allows you to increase your profit margin. We work with you to identify your industry competition and compare your pricing model to ensure you have a competitive edge. We will also examine your financial projections as well as document billing, collections, and aging report processes to ensure you are reaping the rewards of your hard work.

All these systems combined work to help you and your team solve the scalability problem many companies face. As a part of the program, each team member will receive their own Performance Playbook which will document their work and progress throughout the year. You will have a well-documented, scalable infrastructure that you and your team created together to help provide accountability and milestones to celebrate. This is powerful and will set the stage for healthy future growth.

WHO IS HR HUNTSMAN?

HELLO...

I've been privileged to witness firsthand, all around the world, the power of great leadership.

HR Huntsman

Executive Coach & Business Strategist
Founder & Creator of Leader's Edge

Starting a nonprofit from scratch at just 28—my team and I spent the next 22 years growing it into a profound, life-changing organization. We drilled wells in Kenya, built orphanages in Uganda & India, repaired communities after hurricanes Katrina & Ike, and so much more. With over two decades of intentional team development and strategic growth, we grew to 200+ staff members working in five countries around the world.

Over that two-decade span, I learned valuable lessons about team building, communication, vision, clarity, and accountability. Now, at Leader's Edge, we've taken those core lessons and applied them to the **world of small businesses—the engine and backbone of our nation.**

My greatest passion is helping leaders become the best versions of themselves, so they can create time and financial freedom, reduce stress, and scale companies that will attract and retain great talent, gain market share, and enjoy higher profit margins. Leader's Edge Performance Engine has helped organizational leaders nationwide experience six & seven-figure boosts in their business.

LET ME HELP—schedule a consultation call, I'd love to do the same for your business... your dream!



WE HELP LEADERS AND TEAMS BECOME THE VERY BEST VERSION OF THEMSELVES



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LEADER'S EDGE