# How a Michigan Estate Planning Firm Went from Struggling Startup to $75K/Month in Just 6 Months

When Sarah and Tom (names changed for privacy) launched their estate planning firm in Michigan, they had high hopes - and they weren't afraid to bet big. One of the partners took out a $700,000 SBA loan to fund the launch: office space, staff, marketing, technology - the works.

But six months in, reality hit hard.

The money was dwindling fast, but the SBA loan payment wasn't - and that's the kind of debt you can't just walk away from in bankruptcy. The pressure was intense. They knew if they didn't turn things around now, the entire dream was going to collapse.

## 1. Ruthless Focus: Riches in the Niches

The first - and arguably hardest - shift they had to make was this: stop doing everything.

When Sarah and Tom started, they did what many young firms do: say yes to anything that came through the door. Probate cases, family law consults, contract disputes, civil odds and ends - if someone needed a lawyer and had a checkbook, they were in.

At first, it felt necessary. After all, they had a $700,000 loan hanging over their heads, and the pressure to bring in money was intense. But what they didn't realize was that by trying to be everything to everyone, they were sacrificing their own growth potential.

They were exhausted, constantly switching gears, and no one really knew what they were known for. Marketing messages were scattered. Referrals were random. And every new case felt like reinventing the wheel. All of this meant there was absolutely no work-life balance.

One of the first things they had to do was probably the most uncomfortable: narrow your focus.

Walking away from probate cases and other legal work felt like cutting off income sources - at first. But what they were really cutting off was distraction.

The shift to estate planning only allowed them to:

- Build targeted, effective marketing
- Establish a reputation as the experts in their niche
- Streamline their systems and processes
- Deliver better, faster service to every client

And most importantly, it gave them the chance to build something that had real potential.

Instead of a tired, overstretched general practice, they were on their way to becoming a specialized, premium estate planning firm - the kind of business that attracts clients who want the best and are willing to pay for it.

It was the foundation for everything that followed.

## 2. Lead Generation: Stop Wasting Time, Start Filling the Calendar

Once they focused their niche, the next challenge became clear: they needed a reliable flow of leads - not just any leads, but the right ones.

Before we stepped in, Sarah and Tom were throwing money at all kinds of marketing. They had random ads running, were dabbling in social media, tried sponsoring local events, and even paid for directory listings. But none of it worked in a predictable way.

Most weeks, the office felt like a library - quiet, waiting, hoping.

The problem wasn't that people in their area didn't need estate planning. The problem was that their message wasn't getting in front of the right people, at the right time, in the right way.

We helped them stop wasting time and money on scattered efforts and instead laser-focus on the lead generation strategies that actually filled the calendar with qualified prospects.

That meant:

- Identifying where their best clients were already looking for estate planning help
- Crafting clear, compelling offers that made people want to schedule a consultation
- Setting up systems to capture, nurture, and convert leads - not just chase them

Once the right pieces were in place, everything changed.

No more guessing where the next client would come from. No more wondering if the phones would ring this week.

Their calendar filled up, their phones were ringing, and consultations became a normal - even predictable - part of their daily routine.

## 3. Transforming Sales: The Right Person, the Right Process, the Right Results

Inside the firm, one of the biggest hidden problems wasn't legal skill - it was sales confusion.

Both Sarah and Tom were wearing too many hats. They were each juggling client consultations, drafting documents, managing cases, and trying to grow the business. But here's the issue: the wrong person was leading the sales conversations.

Tom, while a brilliant attorney and master of drafting airtight estate plans, wasn't naturally comfortable in a sales role. He approached client meetings like legal consultations - informative but transactional, lacking the human connection that helps clients feel ready to commit.

Sarah, on the other hand, was a natural communicator. She had an intuitive gift for listening, connecting, and guiding people - but she was stuck behind the scenes, drowning in legal work.

When we came in, we restructured their roles to play to their strengths. Tom moved into full-time drafting, where his expertise shined, and Sarah became the firm's dedicated lead for consultations and sales.

But we didn't stop there.

We trained Sarah in a consultative, prescriptive sales approach - not pushy selling, but real conversations focused on understanding the client's needs, educating them on their options, and showing them the value of protecting their legacy.

And just as important, we introduced limited-time offers and clear incentives that gave prospects a real reason to move forward now - rather than "think about it and call back later."

The results were immediate and dramatic:

- Sarah's confidence soared
- Clients felt understood and supported
- The firm began closing Estate Plans for thousands of dollars right over the phone

This wasn't about being "salesy" - it was about giving the right person the right tools and a process that worked. Once that was in place, sales stopped being a stressful, hit-or-miss part of the business and became a predictable, profitable strength.

## 4. The Estate Engine System: Bringing It All Together for a Seamless, Scalable Firm

Even after Sarah and Tom made huge progress - narrowing their focus, generating leads, and transforming sales - there was still a major roadblock holding them back: the chaos behind the scenes.

They weren't strangers to technology. In fact, before we met, they had already paid tens of thousands of dollars to someone who built them a "custom" software setup.

But here's the truth: it wasn't really custom - it was a patchwork of tools strung together with digital duct tape.

They were using:

- multiple form builders for client intake,
- Calendly for scheduling,
- a Wix website,
- Monday.com for task management,
- Google Sheets and Docs for tracking and notes,
- Gmail for client communication,
- DocuSign for contracts,
- RingCentral for calls,
- Mailchimp for emails,
- a mix of invoicing apps for billing,
- and Zapier to glue (most) everything together!

At first, it seemed impressive - but underneath, it was a fragile, constantly breaking system.

Anytime one app updated or changed an API, something would break. A form wouldn't submit. A task wouldn't trigger. An invoice wouldn't send. And every time, they had to pay hundreds or even thousands more to bring someone back in to figure out what went wrong and patch it up again.

It was exhausting, expensive, and unsustainable.

That's when we built The Estate Engine - a true all-in-one platform, purpose-built to handle every part of their estate planning firm without duct tape or constant fixes.

With The Estate Engine, they could:

- Track leads and automate follow-ups - no more missed opportunities
- Manage scheduling and reminders - without external apps
- Streamline intake forms and document collection - all inside one system
- Apply limited-time offers and discounts - automatically and reliably
- Manage fulfillment stages and tasks - with full visibility at every step

The beauty of The Estate Engine was that it made their business as efficient as possible without forcing them into rigid, fully automated processes that don't fit the real-world messiness of legal work. It gave them the perfect balance - automation where it mattered, and flexibility where it counted.

For the first time, everything worked under one roof - smoothly, reliably, and without the constant stress of break-fix cycles.

The result?

Sarah could focus on sales and client relationships.

Tom could focus on drafting and legal excellence.

Clients experienced a professional, seamless journey that built trust and loyalty.

Most importantly, Sarah and Tom stopped putting out fires and started building a business they could scale confidently.

With the right system, they weren't just keeping up - they were finally pulling ahead.

## They Did the Work. We Brought the System.

To be clear - Sarah and Tom showed up. They made the hard decisions. They leaned in. They were coachable.

But without a clear focus, smart lead generation, and an effective sales strategy, they would likely have already burned through that loan money while hoping for a miracle.

And here's what's even more remarkable: they hit $75K/month in just six months - and at that point, The Estate Engine software didn't even exist yet.

We built it after they reached that milestone, specifically to make their lives easier, smooth out the chaos, and prepare the firm to scale further without burning out.

Now, with that complete system in place, we're confident we can help the right attorneys get to these kinds of results even faster - and with far less stress along the way.

## Want to See If This Could Work for Your Firm?

If you're an attorney ready to scale your estate planning practice and leave the chaos behind, let's talk.

I'm offering a free consultation to show you how The Estate Engine can help you build the same systems that transformed Sarah and Tom's firm.

**Schedule your free consultation now**

No hard sell - just a real conversation about what's possible for you.