Fewer status calls: a one-week worksheet

1. Count the calls

For one week, log every client call and what it was about.

Day	Client	What they asked	What set it off	Minutes	Could a message have answered it?

What set it off: status change · notice in the mail · exam or hearing scheduled · decision · long silence

2. Find the trigger

> Most calls follow something: a status change, a notice in the mail, a scheduled exam or hearing, a decision, or a long silence.

3. Write the answer once

One plain-language message per trigger, in your firm's voice. Five to start with.

	USUALLY AFTER	SEND THEM
1 **"Is anything happening?"**	Weeks with no news	A monthly check-in, even when nothing changed
2 **"What is this form?"**	An SSA request in the mail	What it is, when it's due, and to send it back to you
3 **"When is my hearing?"**	A hearing gets scheduled	The date, the time, and what happens next
4 **"Do I have to see this doctor?"**	An exam gets scheduled	Yes, why it matters, and what to bring
5 **"Did I win?"**	A decision arrives	A personal call. Decide in advance what goes by text.

✓ Check every message

- ☐ **What happened**, in plain words, not SSA's
- ☐ **What it means** for their case, right now
- ☐ **What happens next**, and roughly when
- ☐ **What you need from them**, if anything, and how to get it to you

> **The test:** after reading it, would the client still need to call?

4. Send it first

When the trigger happens, the message goes out. A monthly check-in covers the silences.