



STOKES
— & ASSOCIATES —
VOCATIONAL REHABILITATION | LIFE CARE PLANNING

Stokes and Associates Scales Client Caseload and Triples in Revenue After Enlisting a Business Coach

PROBLEM

Dr. Larry Stokes built a successful small practice in the Southeastern United States with a focus on vocational rehabilitation and life care planning. A high-profile career focused on expert witness testimonials in state and federal courts prepared him to work hard. But to work efficiently was a different matter. Dr. Stokes' problem wasn't terribly unique. It pervades executive leadership roles across companies and industries—he had little capacity to scale his business effectively for sustainable growth by addressing long-term demand.

Client caseloads fluctuated wildly. It was feast or famine depending on factors that felt increasingly out of his control. The problem persisted each year, though if you ask Dr. Stokes, he was working harder and longer than ever before. And he had less energy for it. The math didn't add up.

There were many new case referrals and not enough staff to meet the demand. And to make matters worse, his staff was unhappy with the lack of support to maximize their own caseloads. Dr. Lacy Sapp and Dr. Aaron Wolfson, colleagues of Dr. Stokes, both voiced repeatedly their desire to take on more cases. But Dr. Stokes's capacity to delegate shrunk in the face of hundreds of decisions he executed daily, from approvals to case-specifics, administrative tasks, and managerial minutiae. Low energy levels, fear of staff turnover, and concerns for the future all fueled this unsustainable business model.

Industry: Vocational Rehabilitation, Life Care Planning, and Expert Witness Testimony

Client since: 2011 **Staff Growth:** Scaled from staff of 7 to 38

Revenue growth: 700% growth after initiating relationship

TURNING POINT

Dr. Stokes' fears for the future centered around burnout, the inability to replicate himself, and a concern for building strategic profitability.

Dr. Stokes addressed the first success roadblock by enlisting the help of a coach. He was too close to the problem. Time was buried in the daily operational concerns of the business. Dr. Stokes needed an overall growth strategy. Secondly, he needed to diversify his role and hire a dedicated salesperson to deal with onboarding new cases. That way, new experts would be trained in more proficient roles for their skillset. Greg Saliccioli helped him conquer his primary challenge by hiring a salesperson to duplicate efforts.

When Dr. Stokes began coaching in 2011, he was averaging 200 clients a year. Dr. Stokes was directly responsible for managing 75 percent of those. His colleague, Dr. Aaron Wolfson, was handling the other 25 percent. Meanwhile, Dr. Lacy Sapp was waiting in the wings to step into the expert role and begin independent work on caseloads of her own.

SUSTAINABLE SUCCESS

Dr. Stokes wanted to scale fast: add 100 additional clients per year for the first year of his business coaching and thereafter. Once he elevated Dr. Sapp and increased Dr. Wolfson's caseload capacity with a dedicated salesperson, Stokes and Associates easily met this first year goal. Each year after, Stokes and Associates renewed this goal, reaching 500 new clients in three years. A 250 percent increase in new client cases equated to a near tripling of the company's revenue.

Dr. Stokes witnessed these concrete results from the process of coaching at work. This encouraged him to delegate administrative tasks instead of running all decisions across his desk.

For the first time, Dr. Stokes is making more in revenue by working less. He is able to renew his energy by taking time off with the evidence that things are running more efficiently, even in his absence.

Dr. Stokes is now planning confidently for the future instead of reacting to the present. From a place of greater mastery over his workload, Dr. Stokes no longer worries about drowning in administrative burden or mismanaging the talent on his team. Today, Stokes and Associates manages well over 1,000 cases a year. This model of sustainable success allows Stokes and Associates to obtain justice for more clients than ever before. Stokes and Associates grew bigger and faster than Dr. Stokes thought possible.

"The expertise from my coach is efficient and a good use of two hours a month. The bi-weekly coaching call allows for enough time to reflect and implement action steps and provides a path for maximized success."