



THE “WHEN TO USE ME” POSITIONING WORKSHEET

Translating Clarity into Referrals

Where This Fits in the Program

This worksheet is designed to be used **immediately following the “Clarifying Your Niche and Ideal Case” section and as you move into “Positioning Your Practice.”**

In the program, we explored:

- Why most neutrals are too broad or vague to be referable
- How to define your ideal case
- Why clarity alone is not enough

This exercise takes the next critical step:

Turning clarity into language that triggers referrals

Because here is the reality:

If it is not clear when to use you, you will not be used.

Why This Exercise Matters

Most professionals describe:

- what they do
- their experience
- their credentials

But referral sources are asking a different question:

“When should I bring you in?”

This worksheet helps you answer that question in a way that is:

- clear
 - practical
 - memorable
 - and actionable
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How to Use This Worksheet

Set aside focused time and work through each section deliberately.

- Be specific, not general
- Use real cases and real experiences
- Write in plain, conversational language

You are not writing for yourself.

You are writing for the **attorney or professional deciding whether to refer you.**

PART 1: DEFINE YOUR IDEAL CASE (FOUNDATION)

Start with clarity. Build from your niche work.

In one sentence, describe your ideal case:

Now refine it further:

- The type of matter: _____
- The level of complexity: _____
- The dynamics involved: _____

- The stakes (financial/emotional/business): _____
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PART 2: IDENTIFY TRIGGER MOMENTS

This is the most important section.

Complete the following:

“You should bring me in when...”

- Emotions are _____
 - Communication has broken down around _____
 - The case involves _____
 - The parties are struggling with _____
 - The attorneys need _____
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Push deeper:

- The case becomes difficult when: _____
 - Settlement is at risk because: _____
 - The turning point usually happens when: _____
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PART 3: SPEAK IN YOUR REFERRAL SOURCE’S LANGUAGE

Your value must be expressed in **their terms, not yours.**

How your referral source describes the problem:

“I have a case where...”

Your aligned response:

“That is exactly where I help...”

PART 4: DEFINE YOUR VALUE CLEARLY

Avoid credentials. Focus on **relevance and outcome**.

Complete this:

“I help [type of attorney/professional] who are dealing with [specific situation] by [what you actually do differently].”

Now refine:

What makes your approach particularly effective in these situations?

PART 5: YOUR “WHEN TO USE ME” STATEMENT

Bring it all together.

This is your **referral trigger statement**.

Final Version:

“You should bring me in when...”

Optional Expanded Version:

“I work best on cases where...”

AI SUPPORT: GUIDED PROMPTS

Use an AI tool (such as ChatGPT) to refine and strengthen your answers.

Prompt 1: Clarify My Ideal Case

“Act as a professional practice strategist. Based on the following description of my work, help me refine a clear and specific ‘ideal case’ statement that would be easy for referral sources to understand and act on.

Here is my current description:

[PASTE YOUR ANSWER]”

Prompt 2: Identify Trigger Moments

“Help me identify the key ‘trigger moments’ when someone should bring in a mediator with my skill set. Based on this description of my work, generate specific, real-world scenarios that would signal the need for my services:

[PASTE YOUR ANSWER]”

Prompt 3: Translate Into Referral Language

“Rewrite this description of my practice so that it clearly answers the question ‘When should I use you?’ Make it practical, specific, and easy for an attorney or professional to recognize in their own cases:

[PASTE YOUR ANSWER]”

Prompt 4: Strengthen My Positioning Statement

“Refine this positioning statement so it is clear, compelling, and easy to remember. Remove vague language and focus on specific situations where I provide value: [PASTE YOUR STATEMENT]”

FINAL INSIGHT

This is the shift:

- From describing what you do
→ to making it obvious **when to use you**
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Closing Thought

“If someone has to interpret what you mean, they will choose someone easier to understand.”

This worksheet is not just an exercise.

It is a tool you can use to:

- refine your website
- improve your introductions
- guide your conversations with referral sources
- and strengthen your visibility and thought leadership