



How a **CRM** Can Drive New and Repeat Business

A guide to using Lawmatics CRM to improve your firm's reputation, inspire loyalty, and solidify relationships while providing superior customer service to your clients.



Let's face it — administrative tasks far outnumber passionate courtroom scenes.

The life of a lawyer may seem glamorous from the outside, but in reality, it's a lot of tedious administrative work that can take up a great deal of time. From answering incoming inquiries, to sending out marketing materials, to generating documents, lawyers have plenty to do outside the courtroom.

Many lawyers feel like they have to put their clients on the back burner just to be able to keep up with all of the cumbersome paperwork and administrative tasks. It simply isn't possible to give 100% of your effort to 100% of your tasks, 100% of the time.

Regardless of whether it's a small firm or a large one, there are many moving parts to running a practice. Relying on outdated systems like pen and paper to get it all done doesn't just result in more room for error, but it also impacts lawyers efficiency.

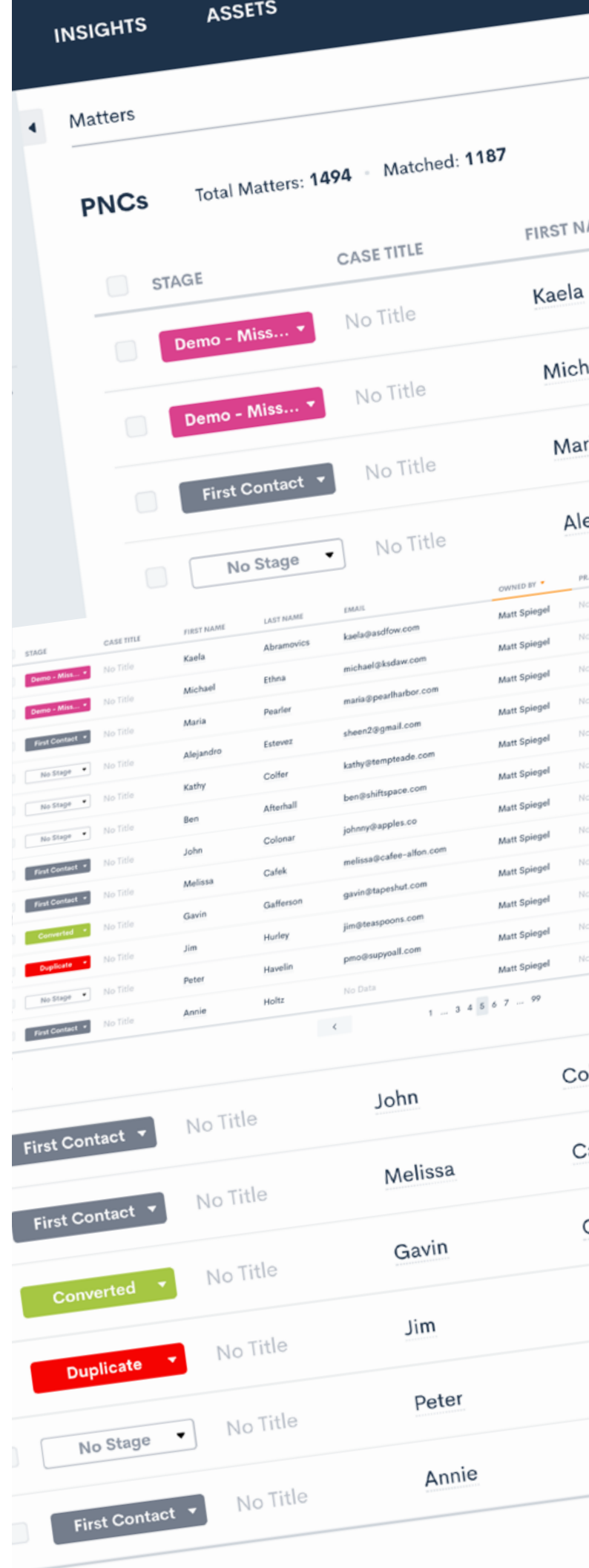
Do you struggle to wear multiple hats throughout the day?



You Need a Legal CRM.

The only way to expand your practice and give your clients the attention they deserve while keeping up with tasks is to rely on a CRM. A CRM keeps everything in your practice organized, meticulously tracking all of your communication with leads and clients, and streamlines your work so that you can focus on what matters most — your clients.

If used correctly, the right legal CRM software is a methodical approach to managing your leads and contacts by automating and tracking the client intake process.



Getting the Most out of a Legal CRM

Here are some of the most useful tips for getting the most out of a legal CRM.

1

REMEMBER, A CRM IS NOT THE SAME AS PRACTICE MANAGEMENT SOFTWARE.

A practice management software allows law firms to access contact information either on-premise or on a cloud. Its function is to help law firms manage their day to day operations more efficiently with less chance of error.

However...

Unlike a CRM, a practice management software only handles existing client matters rather than focusing on client intake, lead conversion, and customer relationship management.

A case management software provides basic functionalities for managing your current cases, by keeping everything organized and accessible from anywhere.

A combination of a robust CRM paired with a practice management software is the best way to systematically handle your existing clients while targeting potential customers. To get the most out of each of these types of software, you need to use them in conjunction with each other rather than one or the other.

CRM for lawyers is designed to provide much more advanced functionalities that go beyond just current clients, but also past and future ones.

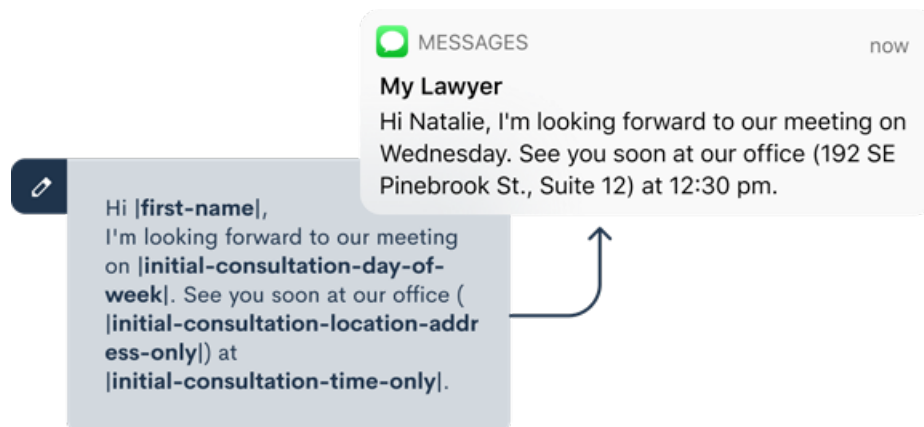
2

PERSONALIZE YOUR MARKETING.

Email marketing is an important part of running a law firm that brings in a steady stream of clients. However, sending out a generic all-in-one marketing approach doesn't inspire most people to open their email.

A CRM helps you take your marketing efforts to the next level by delivering tailored messages based on where your clients are in their journey. Built in audience segmentation breaks your leads into groups that receive unique marketing materials based on various factors like what kind of practice area their case is in.

Personalized content that's relevant to clients unique needs is much more likely to be effective than generic canned emails. You can take information from your CRM and plug it directly into your email campaigns, delivering a meaningful impression that generates more client conversions.



3

ANALYZE YOUR RESULTS.

The best legal CRM's are the ones that do more than just call themselves a CRM. You want one that does more than just organizes contacts. The most powerful legal CRM's gather your firm's data and analyze it, providing valuable insight about your practice.

Running data reports can reveal important metrics like sales numbers, ROI, lead source attribution, and pipeline value. A CRM like Lawmatics was designed to give you all of the information you need to strengthen your relationships with clients and expand your law firm by tracking important metrics to keep you accountable for your goals.

4

**MORE EFFICIENT PROCESSES =
CASES MOVING ALONG FASTER.**

Traditional law firms rely on outdated methods like scanners and printers to get important documents signed and returned from clients. Sometimes lawyers find themselves waiting days to get an important document signed from their clients. The end result is cases moving along much slower, and less potential for growth.

Choose the right legal CRM that offers e-signature software so your cases are continuously in motion. No waiting for important documents to get the ball rolling. Clients can easily send back whatever signed documents you need from the palm of their hand, uploading directly to the database.

5

**GIVE YOUR CLIENTS DIRECT
ACCESS TO YOUR SCHEDULE.**

When you modernize your practice by relying on the right legal CRM, you will wow your clients with improved service like direct access to your schedule. Finding a time for a consultation that works for everyone can be a headache, so make sure that you find a CRM that offers clients self-scheduling with direct access to your calendar. It's as simple as syncing with your personal Google Calendar or Outlook, and clients can choose from only the dates you want them to see, eliminating the need for lengthy email back and forths.



If you hope to grow your law firm, you can't possibly do it alone.



A proper CRM for attorneys can help you provide excellent customer service at EVERY stage of the client life cycle.

- ✓ *With a CRM, your follow up process is on autopilot, so you don't have to worry about whether someone has been called back or not.*
- ✓ *Easily sync your Outlook or Google calendar to your CRM so that leads can choose from only the appointments you want them to see.*
- ✓ *Easily create documents using custom fields tailored to your law firm's unique needs, and send the documents to clients instantly for an e-signature, saving you and your clients time.*
- ✓ *Have total control over all of your data so that you can see where your firm stands at a glance.*

Attempting to do it on your own using a multitude of solutions duct taped together is not only expensive, but also likely to cost you valuable time, resources and will sacrifice some of that experience.

Ultimately, your goal as a legal practice is to grow as much as possible.

"How can I grow my law firm?" is one of the most commonly searched Google questions for lawyers.

- *The more work that starts piling up, the more you might be inclined to hire more staff – but a CRM is a fraction of the cost of hiring more staff, and in many ways, even more efficient.*
- *A CRM helps cultivate client relationships by responding to your clients immediately, going over any vital information that needs to be covered before your appointment, and even sending personalized messages.*
- *With an attorney CRM, you can target your leads and clients into specific groups using audience segmentation and deliver tailored marketing.*
- *With the custom reporting and insights feature, you can take a closer look at the bottlenecks in your practice and generate the results you're after.*



Many of the culprits holding you back may be easily solved by incorporating an organized system into place.



Don't just aimlessly hope for the best.

The right CRM gives you total control over all of your data so that you can see where your firm stands at a glance.

CRM solutions are designed to eliminate the guesswork and manual labor associated with providing an amazing customer experience.

Growing your practice requires knowing what's happening from the inside out — and a CRM can tell you that.

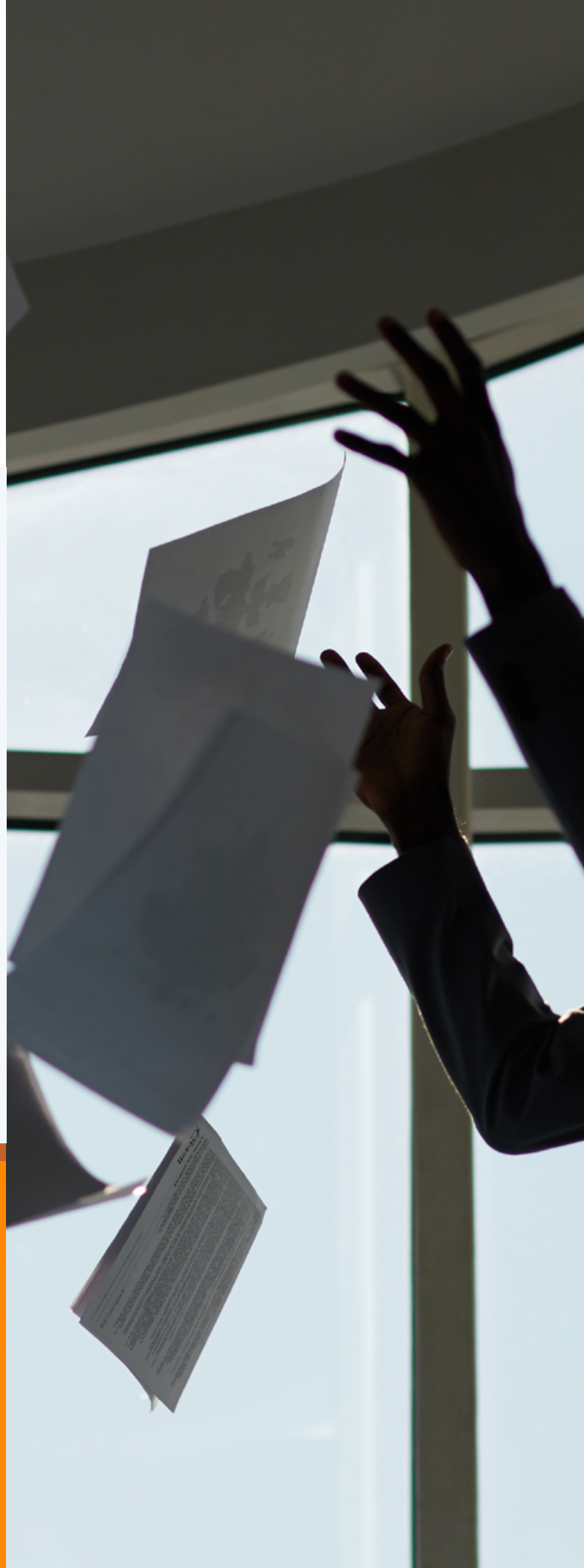
- ✓ *A CRM can gather data from your online forms and analyze it in any way that works for your law firm.*
- ✓ *Boost client engagement and expand your business by gaining insights through reporting tools, converting leads into clients, and strengthening client-attorney relationships.*
- ✓ *Analytics arm you with the knowledge to make informed decisions based on actual data, not speculation.*

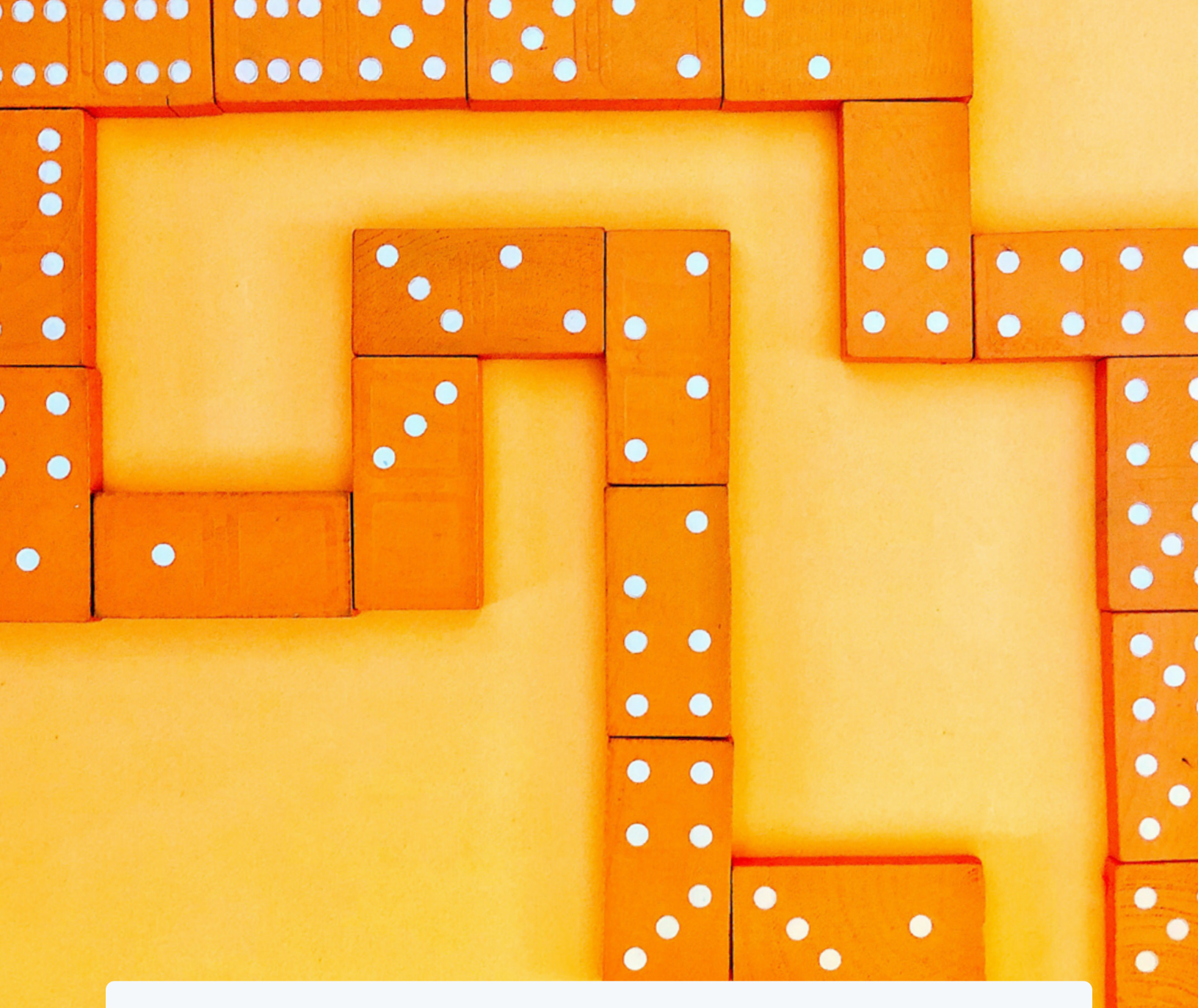
You only have so many hands.

The less you have on your plate with the help of a CRM software the more you can take on, and the better of a lawyer you can be.

- *It's mentally and physically impossible to give the level of attention that each client needs individually and simultaneously, all while practicing law.*
- *Don't make the mistake of assuming that you don't have to impress active clients just because you already landed the job.*
- *If you're not wowing your clients all the way to the point that their case has drawn to a close, then you're missing out on one of your biggest sources of business.*

The most successful law firms know that their clients aren't just customers, but a relationship that requires nurturing through your law firm CRM.





**Are you ready to wow your clients at every
step of their journey with Lawmatics?**

[\(800\) 883-1105](tel:8008831105) • mail@lawmatics.com • www.lawmatics.com

