lawmatics

The Law Firm AUTOMATION PLAYBOOK

Increase conversion rates and client satisfaction while automating the administrative tasks that slow you down.

We dedicate this book to all of our fantastic Lawmatics users with gratitude, for your continued feedback and creative use of the platform that inspires us every day.

— The Lawmaticians


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Foreword

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How valuable is your time? For most attorneys like me, that's always been a pretty straightforward question to answer—especially in today's landscape of billable hours and the rising prominence of flat fees. When you think about how you spend your working hours, there is a significant gap between the efficiencies of modern attorneys who are taking advantage of technological automation and those who aren't.

In the earlier days of practicing law, everything happened on paper in clogged accordion files. If you're cringing right now, you've been right there with me. You were lucky to cobble together some electronic spreadsheets and use Outlook to store your customers' contact information. But the "new normal" and the practice of law looks very different. Now that your often flat-fee-based revenue is dependent on doing more for your clients per hour, it's more important than ever to stop wasting time doing cumbersome, manual tasks when you could be focusing on what matters—growing your business systematically like a CEO.

When I founded MyCase for law firm practice management, my primary goal was to make life easier for attorneys like me. While we solved many challenges, I began to see a quickly growing need for another area of law firm business—client intake and marketing. I think most of us would agree that client intake has historically been tedious and frustrating but it doesn't have to be. When you implement a smart platform that automates repetitive intake and follow-up tasks, plus collects key lead and client data in a cohesive customer relationship management (CRM) system, you will find you can better utilize your time. For attorneys who want to grow, you will be able to turn your attention to tangible marketing efforts in order to multiply your firm's revenue exponentially. That was the vision that motivated us to build Lawmatics. We can't wait to show you how thousands of attorneys like you are using it in ways none of us could have imagined.

Whether you are an experienced CRM and automation user, or today is the first day you are diving in, you will find value in this playbook. We have gathered the most impactful workflows, recommendations, and examples of how firms use automation in their practice—not just for intake but all areas of their practice. There are complete step-by-step instructions and visual guides to show you exactly how to replicate or adapt these powerful systems for your firm.

CHAPTER 1

The Basics of Law Firm Automation

When you hear the word ***automation***, what comes to mind?

The way we view automation as it relates to the practice of law is the ability to mimic manual processes to create systems. That eliminates the manual tracking of tasks, reporting, sending emails, text messages, appointment reminders, and much more.

First, let us begin by providing some examples. In your firm, do you have a list of things that happen when a potential client makes an inquiry, requests an initial consultation, or has retained the firm—such as:

1. Calling leads who have filled out a form on the website
2. Texts to prospects to remind them of an upcoming appointment
3. Merging client information into an agreement and sending it for signature
4. Issuing an invoice and payment request after a client has signed the agreement
5. Sending clients regular status updates, educational emails, or reminders of pending tasks

Whether those lists of to-do's are in your head, part of a digital task list, or manually documented as a policy or procedure, they can all be automated. Automation does not mean that you won't have control over when tasks are completed or the ability to personalize communications. In fact, the opposite is true. By creating what is known as automation or workflow, you can customize an endless amount of individual processes.

The impact is undeniably positive! It has been shown that firms that have transitioned their manual processes to digital workflows have increased revenue per lawyer by over $15,000 per year[1] compared to firms that have not implemented a CRM or workflow automation tool. The difference is in the upfront investment of time and thought. What many professionals believe to be an incredibly taxing process is the fear of taking the time to outline their ideal system which is, in reality, the most exciting part!

1 2020 Clio Legal Trends Report

We challenge you to take a step back and think about the vision for your practice. Let's start with an exercise that will help you identify areas of your business where automation, workflows, and a CRM system will make the most impact.

IDEAL LAW FIRM VISION EXERCISE

The most successful and well-run law firms began with a vision. If you could redesign your practice from the ground up; outline below how your ideal practice would operate differently than it does today.

CHAPTER 2

Identifying Automation Opportunities

Now, let's get a handle on where you and your staff spend the most time. When prioritizing what to automate, this exercise demonstrates the time and labor impact you can expect after implementation.

% OF TIME	STAGE	TASKS
______ %	Lead Capture	
______ %	Client Intake	
______ %	Collecting Case Details	
______ %	Correspondence	
______ %	Word Processing	
______ %	Delivery / Decision	
______ %	Completion & Referrals	

MISTAKEN IDENTITY

The Difference between a CRM and Case Management System

Article Contribution by
Chelsey Lambert

When speaking to attorneys about technology, I often hear, "What's a CRM? Isn't that what a case management system does?" To which I reply, "No, not really." A vague answer for a vague question.

We aim to shed light on a very confusing gray area of functions when shopping for a case or practice management system. First, you must understand what each tool was built to accomplish. To do that, let's focus on the two distinct areas of a law firm.

Front of the house, and back of the house.

The front of the house is where all pre-client or prospect interaction occurs—answering the phones, client intake, and retention. The back of the house is where the delivery of the actual services and payment occurs.

A customer relationship management (CRM) system is designed to support the front of the house sales process. In contrast, traditional case management features are built to help track, streamline, and execute the back of the house processes. Therein lies the confusion. Think about the "statuses" or names you would use to describe a contact during the time frame when working with your front of the house team. A standard set of contact names and lifecycle stages are:

- Lead
- Prospect
- Opportunity
- Won
- Lost
- Not a fit
- Client

Now, let's assume that you close that client and they retain your services. At that time, they become a back of the house contact or client. You will also need to associate other contacts with them who are related to their matter including but not limited to:

- Party
- Spouse
- Judge
- Mediator
- Expert Witness
- Child Custody Evaluator
- Insurance Adjuster
- Defendant
- Plaintiff

There may be several more depending on your area of law or case type. As you can see, the two lists are very different because, until recently, the general population of lawyers has not had to monitor marketing efforts in a laser-focused manner. Now, the marketing and business development aspects of running a law firm have changed. Law firms must track and manage their leads. Lead management requires the use of tags, lifecycle stages, or a CRM tool dedicated to the firm's business function.

Case management software platforms, particularly those in the cloud, have done some work in that area. Most provide users the ability to tag or identify that a contact is not yet a client. However, the real feature gap lies in the management of that specific group of contacts. So much can be learned about where your law firm clients are coming from simply by utilizing CRM features.

When law firm staff tracks the stages of a lead in the initial intake and appointment process, those actions can translate into thousands of dollars of new business or saved marketing expenses for the law firm. How? By running a report or filtering contacts by status, you can quickly project how many potential new cases you can expect. On the flip side, you can also gauge which marketing sources produce the most viable potential new clients.

Those tools only work if they become part of your process. That means either taking the time to learn how to use tags, custom fields, or prospect level features in your existing software or invest in a CRM dedicated to the business development portion of your business.

So, why would I invest the time and money in CRM features?

Here are just a few ways CRM features, when properly used, can make your law firm more money:

You will know what your highest-producing marketing sources are.

Increase spending in those areas and watch the cost of acquiring a new client drop while top-line revenue grows.

You can re-market to clients who did not retain you when you first spoke.

That is an untapped area of revenue for so many law firms! Consumers can take up to one year to retain an attorney. Where did they go after speaking with your law firm? All contacts with a CRM stage of lost opportunity or a tag such as "not ready yet" can be filtered and called upon during staff downtime.

Targeted marketing becomes possible.

A CRM tool also has built-in communication methods in order to send mass messages to contacts in a status. Let's say they spoke to you when they weren't ready. You can segment those leads and send them a follow-up email or helpful video. List segmentation can increase law firm conversion rates much faster than sending those leads the same newsletter that the rest of your list receives. Use segmentation and lifecycle stages to tailor a message that is specific to that group.

You can focus your time on the leads that matter most.

Instead of throwing a net into the ocean and filtering out the type of fish you want, use CRM tools to identify the leads that have the most potential in retaining you.

With automation, you can master the intake process.

A CRM is designed to help you generate leads. A case management system is designed to help you execute the work that the leads are paying you for. Leverage the automation process between your website, marketing efforts, and intake staff. Use tools that share forms, send template emails, and e-signature ready retainer agreements to get them past the finish line as fast as you can. Then, spend the time you saved by delivering an amazing client experience.

A true CRM is meant to be a sales powerhouse.

The same thought process you use to set deadlines, send reminders, and automate tasks with a case management system should also be used for your leads. While you won't receive a complaint from the clerk's office for filing a document past the due date, your bank account will show the stress of one less client retainer payment being deposited.

CHAPTER 3

Elements of Automation

If you can dream it, you can automate it. That is why automation platforms can be overwhelming to anyone who isn't familiar with automation's core principles. An easy way to understand how to use automation tools is to break each process, task, or goal into smaller pieces. Then, work on configuring one process at a time. Do not try to set up your entire CRM or automation platform in a week. It's important to be realistic throughout your implementation.

The setup and configuration of a platform happen over time—gradually iterating and improving based on how the business functions, changes, or adapts to clients' needs. That is why it is critical that you or a member of your team have support resources or access to a community, such as the Unofficial Lawmatics Facebook Group[1], and that you take full advantage of our onboarding and support resources. By learning from other firms who are using automation to power their business, attorneys often find inspiration for ways they can apply the same tools to their practice.

1 facebook.com/groups/676798496127071

Elements of Automation

Each of the following is a component of an automation or CRM platform. Whether you are using Lawmatics or another tool, understanding how each of these features work will help you get the most out of your investment and avoid having to redo portions of your implementation.

Fields and Properties

A basic contact record includes name, address, phone, email, and other general information. Where a CRM or automation platform comes alive is when you create custom fields and properties tailored to your practice's needs.

Consider this: What if you could quickly identify clients who spoke to you about a particular case type or legal need without sifting through your notes file by file? Then, with the click of a button or even better, you could automatically send everyone who matched that criteria a series of emails explaining the benefits of working with you. Now, imagine doing that for every case type, within every practice area you serve, and being

Fields and Properties (continued)

able to automatically begin that email sequence for any new prospects who fill out a form on your website and mark their interest in that particular legal service or matter type.

Taking it one step further, those same case types or custom properties can also be tied to retainer or fee agreement language. When a client is ready to hire you, an agreement can be auto-generated complete with case-specific information in seconds and accompanied by a payment request or invoice—all sent digitally for e-signature and payment via credit card.

Forms

Now that we have discussed the possibilities of creating custom fields and properties, let us dive into where you can use them.

Anyone using a marketing automation platform or CRM should prioritize using forms everywhere they can. One of the biggest areas of "marketing waste or lead loss" is the manual collection and entry of data into a CRM or Case Management Platform.

When you standardize the information coming into your system, you can more easily collect and organize by case type or practice area (See Fields and Properties). You can then create forms that are used for both marketing and internal purposes, including:

1. Forms on your website
2. Forms on marketing landing pages
3. Internal intake forms used by staff who answer calls
4. Inbound call forms used by virtual receptionist services to ensure they collect critical details
5. Lead qualification forms for high-volume practices, such as personal injury or estate planning matters

Once you have created your forms, they can be embedded on websites, used as stand-alone website pages, or sent via email or text message. It is important to know that Lawmatics forms have been engineered to be mobile-friendly which is a critical capability that we recommend you look for from all providers.

Form Completion Actions

After forms are completed, you have the choice to route the completed information to any member of your team. The possibilities are endless. Here are a few examples of what Lawmatics users do after a form is completed:

1. Email and text the prospect who filled out the form with a link to schedule a consultation
2. Auto-assign the prospect to a staff member to call or follow up with
3. Send a text message to the assigned attorney for review or further qualification
4. Enroll a contact in an email or text message campaign with information about the firm and the next steps

Additional form options also include the ability to send reminders to contacts who have not yet filled out the form, which dramatically reduces the amount of time spent chasing down information.

Progressive Profiling

The more information you have about a prospect or client, the faster you can determine the right course for their matter. Think of progressive profiling as a multi-step form, much like many lawyers use during the intake process. After the contact has completed the basic information you need from them, you can present a series of qualification questions that determine the severity of their case or can identify red flags for you before offering to represent them.

Lists and Audience Segmentation

You are only as good as the quality of your data. We cannot stress enough the importance of proper data cleanliness—the better your database, the richer your data, and the more revenue opportunities you can create for your firm. That's why there is such a significant difference between firms that use CRMs and those that don't manage their contacts. Creating a policy for your firm that requires every lead, contact, referral, and source to be entered into the contact's record is a best practice. Once you've built your seamless intake process, you can create lists by specific segments to use as audiences for automated marketing campaigns and targeted outreach.

Understanding Triggers and Enrollment Criteria

Think of triggers and enrollment criteria as automation start buttons. That can include completing a form, indicating how quickly they want to move forward with representation, the signature of a retainer agreement, or any other specific criteria you desire. Once the trigger happens, the automation software can begin the "action."

Here is an example. Let's say a prospect fills out a divorce inquiry form on your website and answers the following question, "How soon are you thinking about filing for divorce?" With a response that equals "less than 30 days," the automation platform can spring into action by sending a text and email message offering to book an appointment and simultaneously sending a text and email message to your internal staff for follow-up.

Another scenario is this. Once a retainer agreement is signed, a "status" property on the contact's record can change from "Prospect" to "Client" and can remove them from any of the marketing or lead nurture communications they were receiving.

The possibilities are truly endless when it comes to choreographing communication paths, processes, and systems that eliminate hours of manual tasks and decrease the time it takes to convert new clients.

When to Use Delays

A "delay" is when you want to give a contact time to act or pause between automated actions the software will complete for you. Examples of delays include:

- Waiting five days before sending the next email
- Waiting one day before assigning a follow-up task to staff after sending out a retainer agreement
- Waiting one year from a client's date of birth or anniversary to send them a card or email

Automated Tasks

In today's predominantly remote work environment, it can be increasingly difficult to monitor a staff member's progress on lead follow-up. In addition, distractions can arise at any moment while working from home. Even in normal work conditions, how many times have small tasks or intentions to follow up fallen through the cracks?

Law firms that standardize and document their lead follow-up processes are significantly more successful and profitable than those who do not. With automation software, you can generate tasks for staff members and clients, then send reminders before the due date and afterward if not marked complete. Advanced task creation includes the use of triggers, for example:

1. Assigning a client to an attorney with a task to review their file once an intake form has been completed
2. Creating a "welcome call" task for a staff member when an initial consultation call has been scheduled to inform them of what to expect
3. Scheduling a "referral thank you call" task associated with new contacts that are entered into the CRM with a source marked "referral."

CHAPTER 4

Communication Methods

Now that you have a handle on automation components, let's get to the fun part which is designing communication campaigns. There are three primary methods of communication that can be automated with Lawmatics as outlined below:

1. **Email:** Whether you want to automate one-time follow-up emails or create a series that run over several months, you can create simple emails that feel like they come from you or polished emails that match your law firm's brand style.
2. **Text Messages (SMS):** Any time you can include text messages in your communication plans, we highly recommend it! Text messaging is replacing email and phone communication at an alarming rate. With significantly higher open and response time rates, getting the attention of potential and current clients requires text messaging.
3. **Video Conferencing:** Contactless virtual appointments are not only safer but more convenient. With Zoom's Lawmatics integration, you can confidently schedule video calls with clients on that world-class conferencing platform.

Combining these three communication methods makes it possible to lead your potential and current clients down a path that presents an incredibly professional image and delivers an impressive client experience. Remember that your biggest competition for winning the business of a client is the world around you. Consumers have become accustomed to shopping online, making a telemedicine appointment when they need to see a doctor, and getting text message reminders for nearly everything they schedule in life from a dinner reservation to an appointment at the dog groomer. Finding the right lawyer should be no different.

CHAPTER 5

Retention and Payment Tools

When a client is ready to sign on the line that is dotted, removing every possible barrier in time and the execution of an agreement is key. Automation platforms may offer integrations or native features that allow you to prepare a document and send it to the client for e-signature. Once an agreement is signed, a payment request in the form of an invoice or link to an online payment page completes the client retention cycle. Features to look for and leverage are:

Document Automation

Most law firms have a shell or standard agreement they use for new clients or engagements that are tailored to suit the matter or specific case type. Where automation software comes in is the ability to merge the client's information into the document and create blocks of insertable text. Those blocks are added into the document when you decide to represent the client eliminating manual creation of agreements. Those text blocks or clauses can be created for all standard service offerings, case types, or scenarios and other areas of the document such as payment terms. By taking the time to create the various text blocks, firms that utilize automated agreements can reduce the amount of time it takes to onboard new clients by up to 70%.

E-signature

Once an agreement has been generated, send the document for signature to the client and preferably with the ability to sign from any mobile device without a login required. Notifications should also be set up to alert the assigned attorney or staff member that the client's agreement has been executed. Automation platforms that offer integrated e-signature tools, such as Lawmatics, also include the ability to auto-assign tasks to staff members in order to reach out to the client and schedule the next appointment or trigger a payment request.

Payment Requests

The final step for many lawyers in the retention cycle is completing an initial retainer or fee payment. Payment requests can be sent as a standalone invoice or link to a secure online payment page via text or email. Additional automation may include notification(s) sent to specific staff members alerting them that payment has been made.

CHAPTER 6

Collaboration and Delivery Tools

After mastering lead capture and intake process automation, shift gears and focus your attention on the delivery stages and overall client management. Native document collection tools and integrations with the leading practice management software solutions allow users to transition a client seamlessly between staff members or departments.

Document Collection

When casework begins, the client will most likely need to provide documents or supporting information related to their matter. Lawmatics document collection tools make it easy for clients to drag and drop documents into an email window for submission to the firm.

Practice Management System Integrations

When a contact officially becomes a client, their personal information, documents, and notes can be sent to the practice management solution of your choice which eliminates hours of duplicate entry and countless internal emails.

CHAPTER 7

Law Firm Automation Scenarios

You're about to become a full-on law firm automation expert! In this section, you will find examples of some of the most common and powerful automation workflows. We encourage you to take in all that you've learned and use this section of the book as a blueprint to build out systems, processes, and campaigns for your practice.

The Lead Magnet Automation

If you use lead magnets to attract new clients, the following automation ensures they are contacted immediately.

1. A lead completes a form on your website for an ebook, checklist, or other lead magnets.
2. You send an immediate, automated follow-up thank you email with an appointment booking link.
3. The lead books an appointment and you automatically receive a notification that a lead has converted.
4. The system tags the lead or updates a contact property to reflect the source so that you can run reports later on which lead magnets are the most successful.
5. A task is created and sent to internal staff to call the contact the same or next day.
6. Based on your lead's needs, you enroll the contact in a nurture or new client sequence.

Watch how this automation is built in Lawmatics

The Intake Automation (Internal)

That is one of the most essential and basic automation processes for every law firm. It eliminates the need for paper forms and organizes the information you collect from clients.

1. When a new prospect or client contacts your firm by phone or email, you can enter their information into a form specific to their case or matter type. The client can also fill out the form themselves which is even better!
2. The system creates a new lead record in the CRM.
3. A staff member is assigned to the lead based on their case requirements and internal workflows and is assigned the task to contact the client in order to review the intake information and schedule a follow-up appointment.
4. Based on qualifiers discovered during the call, the staff member enrolls the lead in the associated email nurture sequence.

Watch how this automation is built in Lawmatics

The Intake Automation (Client Facing)

Because many appointments are now held virtually or over the phone, clients are expected to complete intake forms on their own instead of in the lobby of your office. Help them by reminding them to finish the task by a certain date with text message reminders and mobile-friendly intake forms.

1. Enroll the contact in an intake form request sequence that executes the following:
   - You send the contact an email and text message with a link to the intake form.
   - Text and email reminders can be set up to automatically send every *x* day until they have completed the form. Once the client fills out the form, they are removed from the automatic text reminders.
2. Once the form is completed, a staff member is assigned the task to contact the client to schedule a follow-up appointment.
3. After the appointment is scheduled, the assigned staff member is also assigned the task to review the intake information before the date of consultation.

Watch how this automation is built in Lawmatics

Document Collection Workflow

The process of collecting documents from clients can be tiresome. Instead of wasting precious time and energy chasing the client down, let automation do the work for you. Follow these steps to request and collect documents from clients through a workflow.

1. You enroll the contact in a document request sequence which includes:
   - Email and text message requests for specific documents related to their case.
   - Reminders every *x* days until the document request has been fulfilled.
2. A task is assigned to the appropriate staff member to personally contact the client *x* days after the request was sent if it has not been completed.
3. Once the client sends the requested document(s), a task is assigned to the staff member to review the document(s).

Watch how this automation is built in Lawmatics

Appointment Booking Sequence Automation

Manually scheduling appointments is a thing of the past! Empower your clients to move forward with their legal matter by putting the power to make decisions at their fingertips. After speaking with potential or current clients, send them an appointment booking link that automatically schedules a video or in-person meeting with you.

1. You enroll the lead in the appointment booking sequence that executes the following:
   - Sends an email and text message with a link to your appointment booking page.
   - Sends a follow-up thank you email with important information related to their upcoming appointment.
   - If appropriate, sends a follow-up email and text message with a link to your online intake form so they can complete it before their appointment.
2. Once the appointment is booked, the status of the contact changes to ***appointment booked***.
3. The lead is assigned to the attorney or responsible staff member.

Watch how this automation is built in Lawmatics

Appointment No Show Workflow

Things happen and life can get in the way of a potential or current client's intention to meet with a lawyer. What's important is that when these situations arise, immediate and consistent follow-up is executed to ensure they are rescheduled as quickly as possible. An example of a no-show appointment workflow is as follows:

1. Law firm staff marks the current or potential client's status as "No-Show."
2. The contact is enrolled in an appointment rebooking email and text message sequence. Whenever possible, the sequence should include a link to a calendar rebooking page to select an appointment time.
3. A task is also assigned to a staff member for follow up within *x* number of calendar or business days to ensure that the contact is rebooked by phone if they have not self-scheduled.

Watch how this automation is built in Lawmatics

New Client Workflow

Experience is everything. Today, more so than ever before, it is critical that new clients feel welcomed, cared for, and tended to. Automate the process of wowing your clients right from the start by creating a welcome email and text message communication series. Then, when a contact's status is changed by a staff member or triggered by the completion of a retainer agreement, a series of messages will automatically be sent to welcome them as a client and inform them of what they can expect in the coming days, weeks, or months.

1. Create a trigger that enrolls contacts marked "new" in a new client welcome sequence.
2. Alternate between email and text message communication sharing educational articles or general updates about their case type.
3. Set up a birthday or anniversary reminder for follow-up at a later date.

Watch how this automation is built in Lawmatics

CHAPTER 8

Email Engagement Campaigns

When planning an email campaign, keep the most important principle in mind: know your client. Consider the timing of your messages, content length, and frequency. The capabilities of automation platforms allow you to choreograph a communication pattern with your clients that keeps them engaged and informed. It has been proven that businesses that employ automation tools to deliver frequent and consistent client communication via text and email retain more clients and receive positive online reviews.

Lead magnet email campaign

Enroll contacts who download an ebook, checklist, guide, or another resource from your website in a series that educates them on a particular legal service. Alternate messages include the ability to book a consultation or request an appointment.

Post-consult, pre-hire sequence

Consider that your opportunity to automate a personalized follow-up message from any team member. After a potential or current client meets with you for the first time by phone, video-conference, or in person, send an email or text message in a more casual format.

Did not retain/ hire later

Not every consultation results in a client. Consumers can take up to two years to hire an attorney unless there is a pressing legal matter. Automate the follow-up process with a long-term follow-up sequence that spans the course of three, six, or twelve months. Include the assignment of outbound calls to be made by a staff member on specific dates.

Appointment no-show

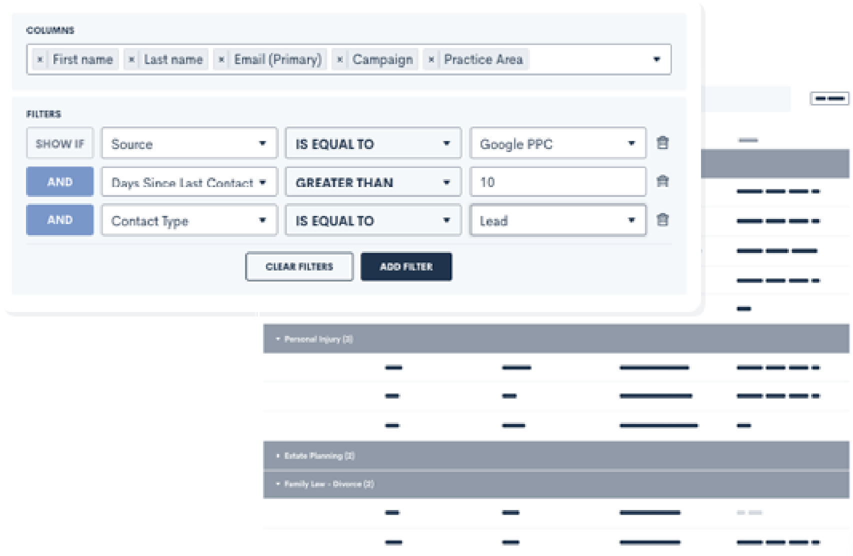
That is a scenario all too familiar if you offer free or no-risk consultations. When a potential client misses their initial consultation, trigger a series of text messages with a calendar booking link to reschedule. A similar sequence can also be used for current clients who need to rebook a meeting.

Case closed/ review request sequence

That is one of the most overlooked opportunities in the case completion and exit process. When you complete a case for a client, sending a series of communications thanking them for their business and requesting a review can positively impact word of mouth referrals and the firm's online reputation. For extra credit, schedule a follow-up task for a year from the case completion date.

CHAPTER 9

Reporting and Optimization



One of the greatest benefits of leveraging a law firm automation system is the data produced over time. For solo and small law firms, visibility into the success of their marketing efforts plays a critical role in their ability to grow profitably. By measuring individual campaign ROI, Lawmatics reports provide users with the answers they need to decide how much to spend and where to cut back.

Over time trends appear, providing opportunities for optimization. Frequently, generating new leads is less pressing than converting more of the leads you already have. For example, upon review of a nurture campaign, if you find that a higher percentage of contacts book a consultation when offered by text message, that same method can be added to all sequences.

Another common report looks at marketing or lead generation by source. If you advertise through various paid campaigns, quickly determine the cost per lead (CPL) and compare it to other sources. Take your profitability reporting to the next level by measuring your total cost per opportunity (CPO) and cost of acquisition (COA) which can be tracked based on the number of consultations booked and total hires per campaign.

CHAPTER 10

Conclusion

A law firm's greatest assets and source of future business are its clients who, in today's overwhelmingly digital world, expect personalized communication frequently which for any lawyer can be difficult to deliver on top of the substantive work to be done.

The value of an automation platform or CRM extends far beyond the execution of tasks and sending messages. It lies in the positive impacts of regular communication, trust building, and convenient communication options on every relationship with a client or contact. At the end of the day, clients want to work with a law firm that makes them feel appreciated and comfortable.

We encourage you to look beyond the traditional uses for marketing automation and CRM tools and consider applying those features to cultivate a memorable experience for every client.

Resources

The Lawmatics Knowledge Base and Video Library

For feature specific training and help documents visit the Lawmatics knowledge base. We also recommend incorporating the video tutorials into staff training plans.

Access all training resources at help.lawmatics.com, in the meantime here are a few of our favorites:

Getting Started Overview

How to build a Drip Campaign

Event Based Automations

Onboarding and Support

Concierge onboarding and 'go the extra mile' service is provided to all Lawmatics clients. Your success is our number one priority.

- Call us at:
  (800) 883-1105
- Submit a support request via:
  support@lawmatics.com
- Email your ideas for features or integrations to:
  mail@lawmatics.com

Lawmatics Partners

Take your firm's use of Lawmatics to the next level by connecting to great partners through our supported integrations.

Practice Management Software

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smith LEXReception

Payment Processing

LAWPAY AN AFFINIPAY SOLUTION

Third Party Integrations

zapier zoom

We're committed to broaden this list to include all major software bundles used by the industry.

To learn more about how Lawmatics can help you make
the vision for your firm come to life, contact us at:

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