Boost Law Firm Productivity with These Legal CRM Essentials

It's no wonder that the global market for [Client Relationship Management (CRM) software](#) is projected to reach $114.4 billion by 2027—[research shows that 80% of customers](#) are more likely to do business with a company if it offers personalized experiences.

CRMs are revolutionizing the way that businesses connect with and market to customers in every industry, with personalized, automated communications, document management, and other essential features. People are your law firm's most valuable asset, so effectively managing client relationships is pivotal to any attorney's success. Unfortunately, traditional methods used to track client communications make it easy for details to fall through the cracks.

Specialized legal CRM software makes managing client relationships more efficient and profitable.

Why is it important for law firms to use a legal CRM rather than an industry-agnostic CRM?

Adapting the generic workflows and tasks built into an industry-agnostic CRM software to your legal team's needs is possible. However, determining which features to use and how to use them is too time-consuming for time-strapped attorneys. Plus, the money you spend on purchasing an industry-agnostic CRM software could end up wasted if the CRM is full of vague, confusing features that leave attorneys unsure of their usefulness.

Law firm CRM software makes managing client relationships simpler and faster for your attorneys—without requiring you to strategize on how to adapt generic features to fit into your firm's workflow.

Another benefit of industry-specific CRM software is that it's capable of integrating with your favourite legal technology solutions without the use of a third-party service.

Legal CRM features are specifically tailored to:

- Streamline daily law firm operations
- Track and nurture legal leads
- Automate attorneys' most mundane tasks
- Store, manage, and automate legal documents
- Improve client intake with automated forms/processes
- Adhere to the legal industry's strict compliance and privacy regulations

The benefits of law firm CRM software

Great relationships are the heart of a successful legal practice. When used effectively, a legal CRM can contribute to increased client loyalty and retention, improved communication, and—as a result—increased profits.

Your clients notice when your legal team is organized.
A reliable legal CRM empowers attorneys to answer questions from clients and leads more quickly and accurately by ensuring that all of your client information is easily accessible from a central location. By automating key follow-ups and helping your legal team track and prioritize important calls, the right CRM also makes it less likely that important communications will ever fall through the cracks.

Essential law firm CRM features

Automated email and text follow-ups

Reaching new leads quickly is critical if your law firm wants to sign new clients. Although consistent communication is necessary to guide prospects through your sales funnel, many attorneys don't have the time to regularly follow up with prospects via text and email.
The result is a frustrating loss of significant revenue, as countless leads move on with another law firm that they deem more responsive.
Law firm CRM software allows your firm to send automated, personalized text and email follow-ups within seconds, so new leads will hear back from your firm promptly, even when your attorneys are busy.

Automated text and video messaging

With the right legal CRM, you can target all types of content to educate your prospects about your law firm's culture, payment structure, and more. You can also send automated texts and videos that provide relevant information to your leads and clients, based on the details they've provided on contact and intake forms.

Using text and video to reach potential and current clients demonstrates that your law firm is competent, agile, and dedicated to providing the most convenient customer service possible to your clients. It's also an effective way to boost the open and response rates on your messages. [58.7% of consumers respond to text messages](#) within 5 minutes, and just under   of consumers respond to texts within one minute.

Dashboard analytics

Are you [using your legal CRM effectively](#) to market to clients? Running analytics on your firm's key metrics is the only way to know for sure. Many law firm CRM software includes dashboard analytics features that allow you to review key performance indicators (KPIs) at a glance, including:

- Attorney/staff productivity
- Case metrics
- New client sign-ups
- Return on marketing investment

This knowledge is power when it comes to maximizing your firm's marketing spend and landing high-quality legal clients. Without an accurate picture of how effectively you're managing client relationships and marketing tasks, your firm could carry on unprofitable practices for years without ever knowing.

Task management tools

At the end of the day, there's one thing that you can't automate at your law firm, no matter how hard you try—your people. Attorneys are human. They may forget tasks, especially marketing tasks, since practicing law is their prerogative.

Legal CRM task management tools eliminate confusion, forgetfulness, and

productivity killers to keep your team on track and increase your firm's overall earning capacity.

Built-in softphone

Reaching out to follow up with clients and prospects manually requires a lot of attorneys' time and mental energy, but so does figuring out who to reach out to first. Plus, to err is human. Less experienced members of your firm's legal team may find it challenging to determine which leads are the most likely to sign a contract with your firm.

The industry-leading legal CRM and TimeSolv partner [Law Ruler](#) offers a click-to-call, built-in softphone that also includes texting capabilities. The softphone tracks client communications securely and identifies which prospects attorneys should contact and when, taking the guesswork out of follow-up calls.

The ability to track and initiate client communications directly from within the CRM interface saves attorneys time and encourages better collaboration between members of your legal team.

Industry-leading law firm CRM software support

Whether you need help migrating from previous software or are looking to customize automation tools to fit your workflow, your legal technology should be accompanied by [top-notch support](#). Video resources, chat and phone support, and personal training for your entire legal team should all be available with a high-quality legal CRM.

With a variety of educational resources to turn to, your legal team can feel confident using all of your legal CRM's features, leading to a better return on your investment.

Robust integrations

One advantage of using a law firm CRM software over an industry-agnostic CRM is that legal CRMs can integrate with other legal technology solutions without a third-party service, which saves time and also eliminates concerns about violating the legal industry's strict privacy and compliance regulations.

For example, [integrating your CRM with your time and billing software](#) allows you to import new client information directly into your time and billing tools, without the need for time-wasting and error-prone double data entry.

Try TimeSolv's new integration with Law Ruler

Although genuine human connection is at the core of running a successful law firm, legal technology makes it possible to improve the caliber of your interactions with potential and current clients from the intake process to the conclusion of their legal matter.

To nurture high-quality relationships with your clients and protect your law firm's bottom line at the same time, [TimeSolv integrates with LawRuler](#), an industry-leading CRM for law firms.

Contact us today to [schedule a demo](#) and see for yourself how [TimeSolv](#) and [Law Ruler](#) work in tandem to improve law firm workflows, profits, communications, and more.