Tip of the Month: Convert Leads Faster with TimeSolv CRM

TimeSolv is where you manage the business side of your firm—time, billing, tasks, and more. But there's also a built-in solution for what happens before a lead becomes a client: **TimeSolv CRM**.

With TimeSolv CRM, your firm can automatically capture, organize, and follow up with leads faster, so potential clients keep moving toward signed agreements instead of slipping through the cracks.

In this month's tip, we'll show you how TimeSolv CRM supports lead capture, follow-up, and conversion, plus how to enable it for your firm.

What Is TimeSolv CRM?

TimeSolv CRM is a client relationship management tool that extends your existing TimeSolv workflow into the lead and intake stage, giving your firm a more connected way to manage prospects before they become paying clients.

Think of it as support for the three stages before a signed agreement:

Capture **Follow up** **Convert**

Instead of tracking new inquiries across spreadsheets, inboxes, calendars, and disconnected intake tools, TimeSolv CRM keeps your lead management process in one place and connected to the platform you already use every day.

Firms with TimeSolv CRM can:

- **Capture every new lead** from your website or intake forms
- **Track the progress of every prospect** in your pipeline

- **Automate follow-ups**—texts, emails and reminders
- **Assign incoming leads** to the right team members
- **Keep communication organized** in one place
- **Collect eSignatures digitally** with one click
- **Move signed clients into TimeSolv** faster

And because TimeSolv CRM connects to the TimeSolv account your firm already uses, setup is simple. Once enabled, your lead and intake workflows can start working alongside your time, billing, and matter management tools.

How TimeSolv CRM Helps You Convert Leads Faster

Speed and consistency matter during intake. The longer a lead waits for a response, follow-up, or signed agreement, the more likely they are to move on to another firm.

TimeSolv CRM helps reduce those delays by making lead management and intake a simple, consistent process:

- **New leads flow into TimeSolv automatically** and receive a personalized follow-up right away.
- **Automated emails and texts** keep nurturing prospects until they are ready to move forward.
- **Mobile-friendly intake forms** help pre-qualify leads so your team can focus on the right prospects.
- **One-click eSignatures** help prospects move from consultation to signed agreement faster.
- **Signed clients move into TimeSolv as new matters** so your team can start work with less duplicate entry.

These integrated CRM tools help your firm respond before leads go cold. Your team can see the full conversation history, know who should act, and move each prospect closer to a signed agreement—all inside your TimeSolv workspace.

Once a lead signs an agreement, their information can automatically move into TimeSolv as a new matter. That means less duplicate entry, fewer administrative delays, and a faster onboarding process for your staff.

How to Enable TimeSolv CRM

Getting started with TimeSolv CRM is quick for existing users. To enable this add-on, just book a demo with the TimeSolv team to go over the full setup, configuration, and integration with your existing TimeSolv account.

Once enabled, your firm can start automating lead capture, intake, follow-up, and conversion inside the TimeSolv workspace you already use every day.

Turn TimeSolv into Your Lead Conversion Engine

TimeSolv CRM helps your firm do more with the platform you already trust. From lead management and follow-ups to seamless intake and eSignatures, you can convert leads faster while your tools handle more of the work.

To get started, book your TimeSolv CRM demo today or contact our support team. Need help? Call us at 1-800-715-1284.