Top 4 Reasons Why Lawyers Need Client Intake Software

Intake software may seem like the cherry on top of the sundae—nice, but unnecessary—but it's a critical part of any law firm's recipe for growing their practice. Experts expect the global customer relationship management software market to increase to $49.6 billion by 2025—and with that kind of business success, it's time to consider the possibilities of client intake software for your firm.

Read through these top 4 reasons all lawyers can benefit from using client intake software at their law firms.

Reason 1: Find the right clients

If you've ever signed a client contract only to realize that the client needs services outside of your practice area, then you know the importance of qualifying your leads during your intake process. A smooth intake process, supported by the right software features, can help you avoid these uncomfortable situations by allowing you to identify which clients are a good fit for your firm before you agree to any services.

Make sure your intake software incorporates the following features:

Smart intake forms

Client intake software should offer smart intake forms, which are built online and can be customized for different types clients and different practice areas. The best part? The software pre-screens clients for you as they answer the questions. These forms can even adapt your follow-up questions based on responses, a feature that spares you from significant administrative work.

If the client's answers indicate that they're not qualified for your services, you can create and automatically send a personal message from your law firm explaining why you're not the right fit. (This can be an opportunity to tap your referral network, though—direct them to a colleague who is a good fit!)

If their answers meet all the criteria, you can onboard them with confidence that they're the right ones for your firm.

Softphones

After determining whether a client is right for your firm, you'll want to contact them quickly. Softphones allow you to click on a client profile straight from your intake software and call them automatically.

These user-friendly tools provide a log of your leads, so you can easily update the status of where clients are in the funnel.

Email marketing

Connecting with leads is only part of bringing in new clients. You also need to know how to generate leads in the first place. Client intake software offers critical marketing tools that streamline your email marketing by:

- Automating drip campaigns after a lead clicks a website link, views a webinar, or otherwise triggers an email newsletter
- Keeping all email addresses and other client information in one place for easy contacting
- Automating reminder emails to previous clients or lost leads about your services

Using email marketing, smart intake forms, and softphones makes the client conversion process straightforward for your law firm.

Reason 2: Start legal matters promptly

Once you get a client on board, you want to work on their case as soon as possible.

Client intake software offers automated scheduling and calendaring features so you can get a meeting on the books as soon as a lead asks about your firm. Having an appointment on the books will help your clients feel seen and heard, without you having to spend too much time on back-and-forth communications to set it up.

Sometimes email isn't the best way to reach someone, though, so you'll want to use CRM software that offers different follow-ups that work for all of your potential clients. Text message follow-ups are a great way to market to leads and ensure they see your messages—98% of text messages are read by clients and prospects, so if you need something quickly, texting is the way to go.

Another tool to start legal matters promptly is automated workflows. In your client intake software, set up a series of templatized tasks for every type of case you take on. When the client completes the first step, whether that be filling out a website questionnaire or sending you an email, you can automate a series of tasks for your team and move the client through the pipeline. These tasks show you, at a glance, how many clients are in each step of your funnel and where any bottlenecks may be happening.

Reason 3: Reduce non-billable administrative work

If you're a lawyer, you shouldn't be spending your valuable time submerged in non-billable tasks. Speed up these time-consuming tasks with document assembly tools in your client intake software.

When you have to manually type up client information to create legal documents, you'll deal with inaccurate data entry. Instead, use data from your client intake software to automatically input information about your client's case in custom document templates. You can rest assured that the information will be correct because it's only stored in one place: your client intake software.

Another client intake task that can take hours of valuable time is gaining client signatures. If you want clients to sign a paper contract, you'll have to send it over through certified mail and wait days for a client to return it. Instead, use client intake software that offers secure file sharing and e-signature features.

When you send clients documents securely via email or text, they'll be able to sign them faster and more conveniently on their device, such as a smartphone—plus it will reduce signing errors, as clients can't send documents back until every area that needs to be signed is filled out. Instead of waiting days for a client to send back a contract and get started on their case, you can get the signed contract back within minutes.

Reason 4: Deliver impeccable client service from the start

One of the biggest problems with client intake is that people who reach out for legal support so often feel ignored—42% of the time, it takes three or more days for a law firm to respond to a client's inquiry.

Give your clients top-rated service from the first point of contact using client intake software that responds to them immediately. You can send them an intake form, schedule appointments, and start building your relationship with them without missing a beat.

Plus, you can improve any issues with client service using the analytics dashboard in your client intake software. Outlined metrics help you understand how many clients are signing up, which one of your attorneys and staff is helping new clients the most, and how your marketing is securing new clients. Dashboards show the bottlenecks in your client intake process so you can improve workflows.

TimeSolv integrates with client intake software to maximize client experience

If you're looking to add client intake software to your tech stack, try TimeSolv's expert legal time and billing software, which integrates with Law Ruler—a client intake and customer relationship management software designed specifically for law firms.

Law Ruler's robust client intake features support:

- Smart, customizable intake forms that qualify leads for you
- Reduced data entry because client information is all in one place
- Quick legal document creation using saved client information
- Secure file sharing and e-signature tools that make it easy to get documents signed

To learn how you can use Law Ruler with TimeSolv to streamline your client intake process, schedule a demo with TimeSolv today.