

7 Essential Legal CRM Features



The right client relationship management (CRM) software can position your firm for growth and streamline your relationships with leads and clients—but not every single CRM is suited for the daily needs of law firms.

A generic, industry-agnostic CRM is likely to come with a number of drawbacks, including:

- Generic workflows and tasks
- Vague features that don't meet your firm's *specific* needs
- Software features that aren't designed to help you maintain compliance with bar rules

Instead, it's best to look for a legal-specific software that offers these powerful CRM features.

Key law firm CRM software features

Law firm CRM software is specifically designed to track and nurture leads, automate attorneys' most mundane tasks, and support new client intake. If you're considering adopting a legal CRM for your practice, look for these essential features:



1 Automated email and text follow-ups

Never lose another lead to the first firm that responds. Reach potential clients quickly and consistently through personalized, automated follow-up emails and texts.

2 Built-in softphone

A built-in softphone like the one included in Law Ruler's industry-leading CRM can allow your attorneys to prioritize, dial, track, and record calls with leads, clients, and other contacts directly from within the CRM itself.



3 Automated text & video messaging

58.7% of consumers respond to text messages within 5 minutes. Use text and video to demonstrate your law firm's agility and provide your clients with the most convenient communication possible.



4 Dashboard analytics

Law firm CRM software analytics allow you to review key performance indicators (KPIs) at a glance:

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



5 Task management tools

Legal CRM task management tools remind attorneys when it's necessary to reach out to clients directly and when to complete basic marketing tasks.

6 Accessible support

To use your law firm's CRM software effectively, your legal team needs accessible, reliable customer support options, like in-person training, video resources, and chat and phone support.



7 Robust integrations

Your legal CRM should integrate with your other software support tools without the need for a third-party service. For example, TimeSolv offers a robust integration with industry-leading CRM [Law Ruler](#), making it easier than ever to provide excellent service and protect your clients' bottom line at the same time.

