Four Ways Technology Can Help Your Firm Win Clients During Intake

For attorneys in law firms, the client intake process is as important to their success as the actual legal work they do. After all, they can't do that legal work if they don't have any clients.

The intake process begins when a prospective client contacts a law firm. At that point, the firm has an opportunity to make a positive first impression that shows the prospect that he or she should choose that firm. By interacting with a prospect in a way that garners trust, a law firm will maximize its probability of converting that prospect into an actual client.

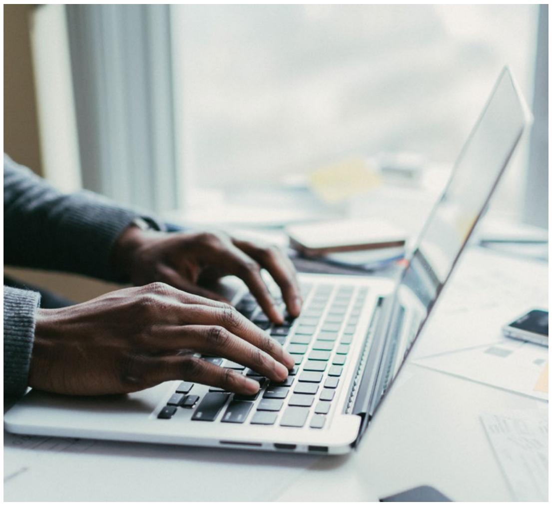
For law firms of all types, but especially solos and small firms, technology has revolutionized the client intake process. Legal customers expect all their service providers to deliver incredible user experiences, similar to what they've come to expect from companies like Amazon®, Apple® and Zappos®. They will naturally gravitate toward law firms that provide them with similar experiences.

Technology also makes life easier for law firms by increasing the efficiency of their intake process.

Here are four ways solos and small law firms can use technology to win clients over during intake—and make their firms more efficient at the same time.

1. ONLINE FORMS LET PROSPECTS TAKE CONTROL (AND DO THE WORK)

Ever had to fill out a pile of paperwork at your doctor's office before an appointment? Ever wondered why the office couldn't have contacted you a week or two before your appointment and had you complete those documents online, at your convenience?



Now you know how your prospects feel whenever you give them documents to complete when they come into the office for an initial consultation.

Using customized online forms, you accomplish two key things.

First, by giving prospects access to these forms in advance of their initial consultations, you enable them to take control of the process and complete this task on their own time.

Second, by having prospects enter this information, you free your staff (or yourself) from having to do so. And, because the data will be in digital form, it can easily be imported into your firm's practice management software or fed into another application that will allow you to automate documents.

2. DOCUMENT AUTOMATION PUTS YOUR CAPTURED DATA TO WORK FOR YOU

Speaking of document automation, when building client-specific versions of commonly used forms, there's no longer a need to copy and paste information from your files or, even worse, manually enter this information.

With document automation, you can automatically populate these fields once the information that belongs in them is entered in your online forms. In as little as a few seconds after a client has completed his or her intake form, you could be emailing—automatically—a customized retainer agreement and other forms for a prospective client to review and sign.

This fast turnaround of personalized documents sends a message to a prospective client that your firm is efficient and on the ball.

3. YOUR PROSPECTS DO EVERYTHING ELSE ON THEIR MOBILE PHONES. WHY NOT LET THEM UTILIZE THIS TECHNOLOGY TO SIGN YOUR DOCUMENTS?

Instead of expecting your prospects to print out documents, sign and take a photo of them or scan them and then email them back to you, let clients sign them remotely, from their mobile device.

By offering the ability for prospects to electronically sign documents, you are showing them that you are committed to making their lives easier.

4. USE EMAIL TO EDUCATE—AND NUDGE

If you have been in practice for longer than a day, you know that prospective clients don't always sign retainer agreements promptly.

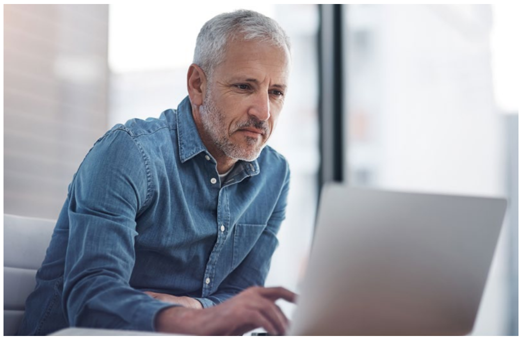
Automated emails that are scheduled to be sent at specific intervals (known as "drip" emails) are an excellent way to continue a prospect's education efforts while also nudging them to complete the intake process.

You could create a drip email campaign where, once a week, a prospect is receiving an email that alternates between education ("Five things to know about medical malpractice cases") and a reminder ("It has been two weeks since we sent you an engagement agreement. Do you have any questions?").

Such a campaign will show prospects that your firm is knowledgeable about their legal issues while also helping you nudge them to complete the intake process.

TECHNOLOGY CAN TURN YOUR INTAKE PROCESS INTO A MARKETING TOOL

A prospect is still a prospect until that retainer agreement is officially signed.



Putting technology to work as part of your firm's intake process will send a message to your prospects that your firm is committed to making their lives easier. That message is likely to resonate with prospects because most of them are looking for an attorney to do exactly that for them.

This technology can also help your intake process run more smoothly, which allows you and your colleagues to devote time to other aspects of your law firm that could benefit from the attention.

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