Optimize Client Intake: An 11-Point Checklist for Law Firms

Follow this checklist to optimize your legal matter intake procedures to build stronger client relationships, save time, and reduce redundancies and errors.

actionstep

Practice Management Software

1

Map your ideal client intake process

Do you truly know what your current client intake process is? Does it change from team to team? What currently works well?

Think about what areas of your business could be more streamlined. Are you slow to answer client inquiries? Or to conduct a conflict check? Is your legal staff spending too much time carrying out repetitive tasks? These obstacles pile up and can ultimately affect your clients' very first experience with your firm.

Put yourself in your clients' shoes to understand what would delight them while also considering your needs as a business. What would the ideal client intake process look like? Mapping out the steps, tasks, timings, and templates needed to create an ideal client intake process is what we call a workflow.

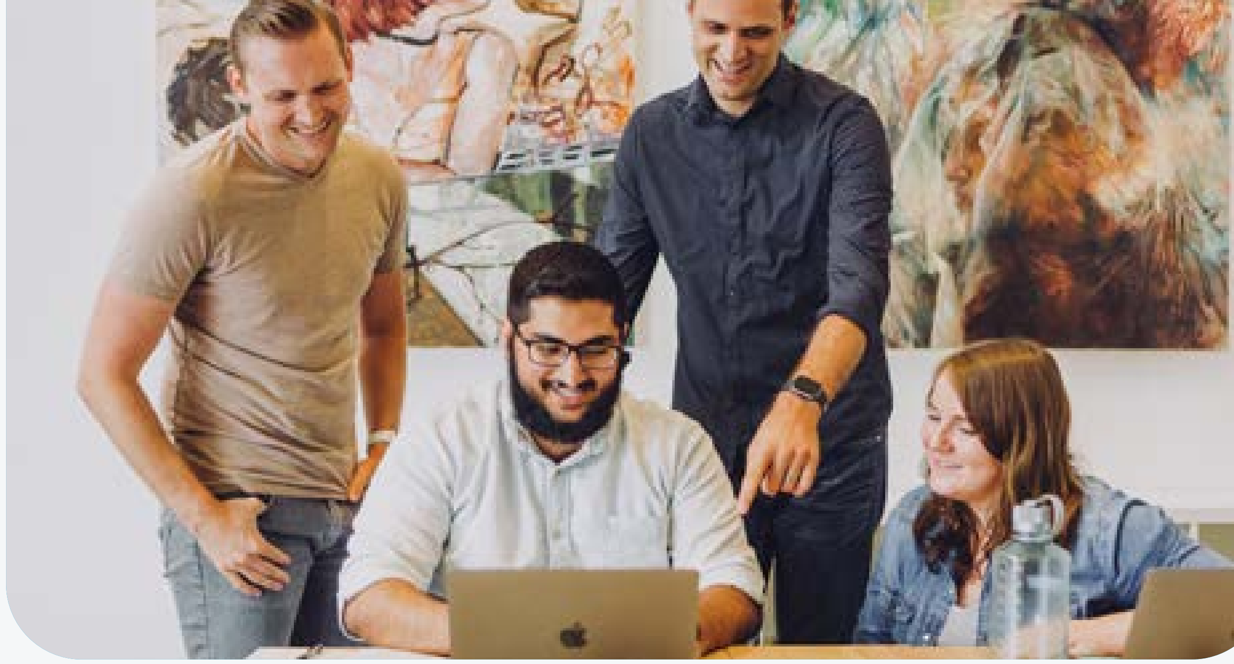
2

Identify opportunities for automation in your workflow

Once you have mapped out your ideal intake workflow, the next step is incorporating automation into these workflows. This will help your team provide more personalized (and timely) services to customers by quickly tackling intake tasks, such as:

- Prompt users to enter key details as the system records information
- Create and send communications based on editable templates
- Assign and track tasks, alerting responsible team members of what to do next
- Schedule appointments, send follow-up reminders, and more

With automated workflows responsible for defining the steps and timing to complete client intake tasks, you can relax knowing you've built a structured pipeline to make the best first impression with customers.



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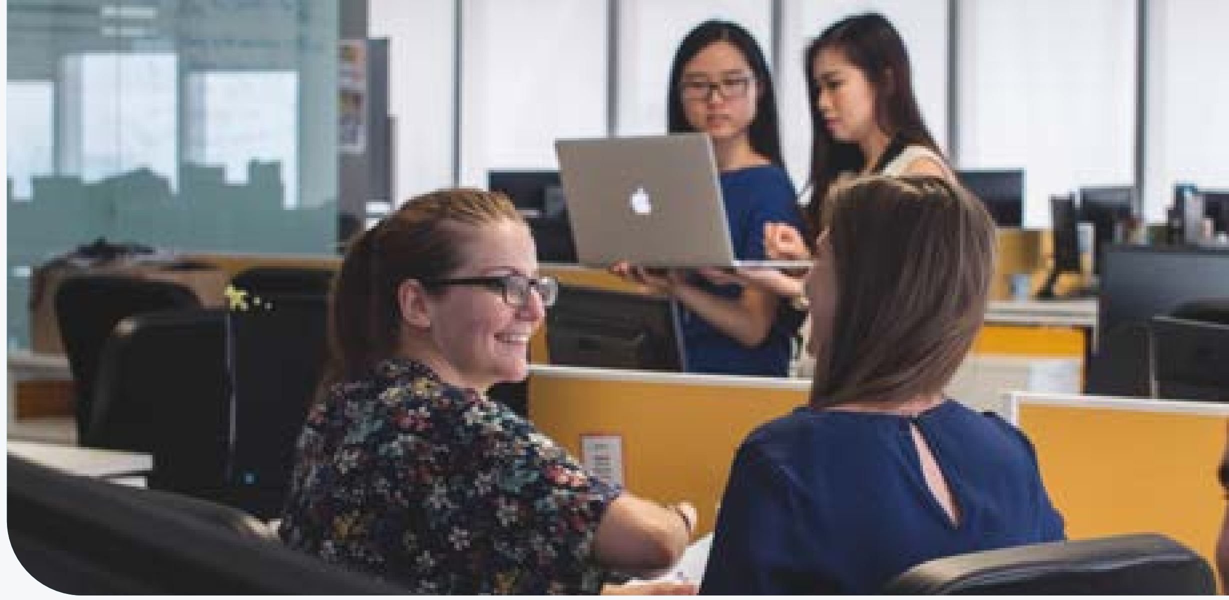
Customize a digital client intake form

Next, you'll need to set up a digital client intake form using a form builder. Include anywhere from 5-10 questions designed to capture useful details prior to connecting with a potential client. Here are a few fields you should include on your intake form to understand why someone contacted your firm:

- The name, position, address, phone, and email of all parties involved
- Their company name, street address, state, county, and city
- Any related assumed, trade, or fictitious names
- A brief description of the situation giving rise to the matter
- The legal services the prospect needs

An automated form builder will allow you to create and customize a digital client intake form to collect the details consistently.

Pro tip: Consider allowing prospective clients to fill out the intake form themselves through a "Contact us" link on your firm's website. If prospects call in, a legal professional can ask the questions and fill out the form for them, so all the information is recorded on your platform for future reference.



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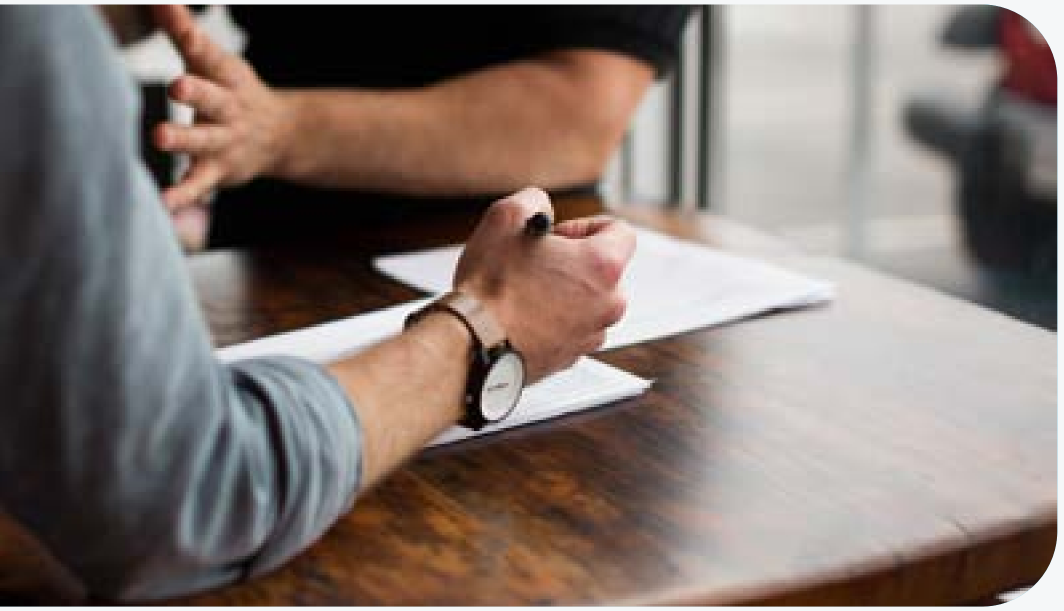
Set up a system to process new client intake forms

Now you'll need a place to process and house all client intake forms to ensure the correct people follow up with prospective clients in a timely matter. Consider using a central system such as a cloud-based legal practice management software with modern client management capabilities. A platform like this will automatically log every communication to a comprehensive intake matter file and prompt actions for each inquiry and client engagement.

Your firm's professionals can answer questions more quickly and knowledgeably, helping prospects feel prioritized and confident that your firm cares for them. Once a prospect becomes a client, the platform gathers all client intake activities, matter management, file requirements, and billing procedures in the same location.



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Quickly respond to new client inquiries

Once your digital client intake form is up and running, be sure to respond quickly—within one hour if possible and 24 hours at the latest—to gain a competitive advantage. Consider sending a short, automated thank-you email to the prospective client letting them know you've received their inquiry and will be in touch soon.

One digital firm who reached out to 701 of the top law firms across the US, found that:

- 59% of prospects responded to their lead form submissions
- 40% didn't respond at all
- 70% of firms that responded to an inquiry did so within an hour
- 59% responded within 30 minutes

Some more stats to consider:

- 67% of legal consumers looking to hire an attorney place a call during regular business hours, and most expect a response the same day
- 65% of legal departments said they measure "responsiveness/communications" as the top key performance indicator for outsourced providers
- 65% of US general counsels said they expect to be able to always reach their outside lawyers—even if there's not a current emergency

Don't miss out on new business and making a good first impression by replying late to inquiries!

6

Automate conflict checks for legal matter intakes

Before bringing on a new client or matter, the Model Rules of Professional Conduct requires firms to check for any conflicts of interest. Your digital client intake form should capture all the information required to complete a conflict check.

Leverage your legal practice management software for a one-click conflict check function that delivers more thorough and streamlined results. An all-in-one platform houses all of your firm's time recording, billing, and matter management data into a single system which lets the one-click conflict check feature automatically search all firm emails, matter files, and contacts. It targets precise details to return only the most relevant results.

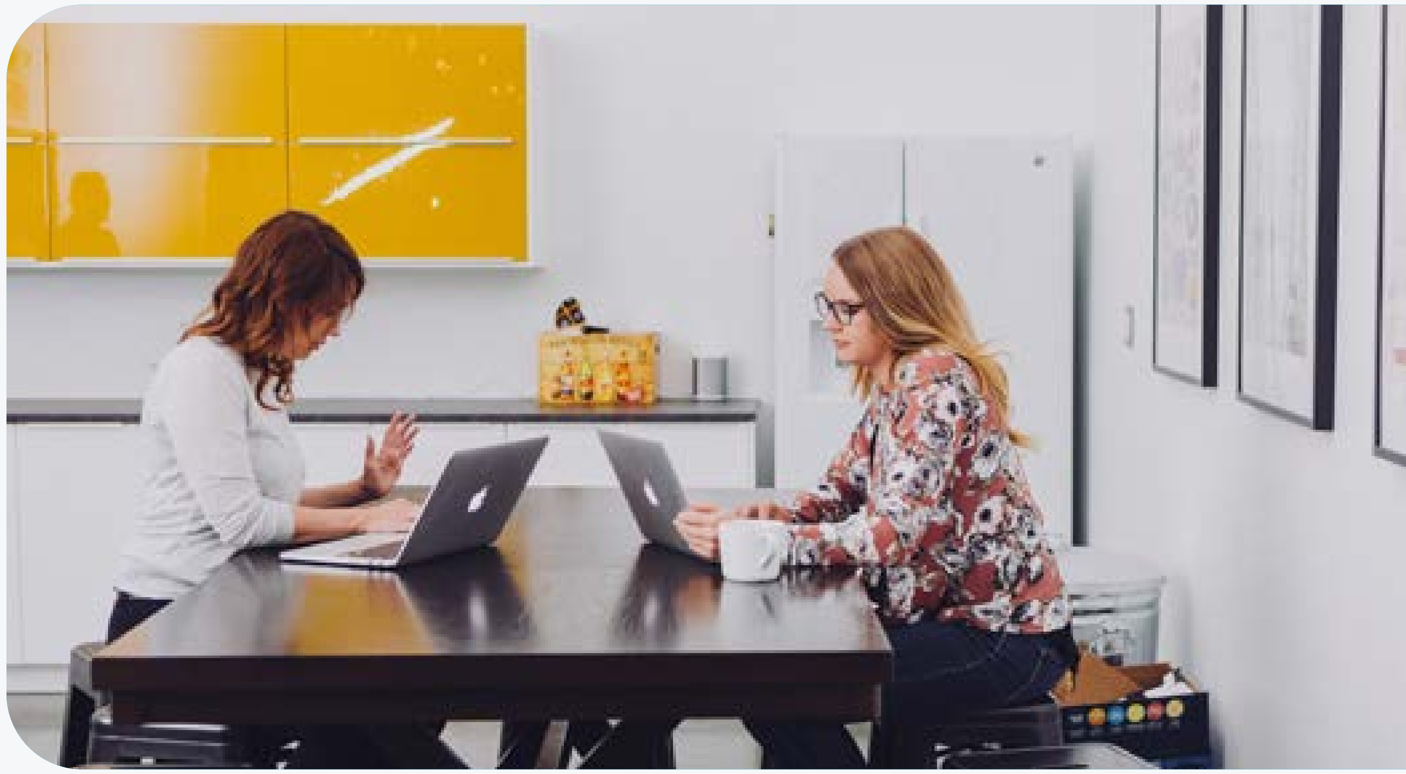
As a result, you can eliminate the conflict-check limbo and start addressing a prospect's needs quickly.

7

Automate legal matter intake tasks

Next, identify which repeated tasks in your workflow can be delegated to appropriate staff members and add appointments and follow-ups to calendars. After a prospect or staff member submits a digital intake form, automated workflows can instantly:

- Assign a task to follow up with the prospect and notify a staff member via e-mail and their notification bar
- Quickly convert the information into a matter, transferring all details to the correct data fields in your system so that the prospect will not need to repeat their contact information to multiple team members.



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Monitor, measure, and optimize your law firm's client intake process

Once your digital client intake process is up and running, it becomes part of an integrated system that lets you track and report on a variety of factors for metrics-led decisions, such as:

- Number of new client inquiries
- Number of calls versus online inquiries
- Number of consultations scheduled
- Intake response times
- Engagement timelines from enquiry to matter creation
- Prospective clients' demographic and geographic details
- Referral sources
- Ongoing incoming client communication response times

Take this information and fine-tune your intake forms or specific steps in your workflows to better support the most common situations your firm handles. You might add or remove questions, automatically route intake forms to specific individuals in each practice area, or even create individual intake forms for various practice areas.

9

Uncover ways to generate additional value for the firm

Now your client intake process acts as a strategic part of your business development pipeline. With a customizable form builder on hand, you can ask prospects for any details you'd like (but be careful not to overwhelm them with too many questions).

Tracking this intake data can reveal:

- What areas of your practice generate the most interest
- What types of organizations contact your firm most often (e.g., small to mid-size companies, large corporations, entrepreneurs, etc.)
- How a prospect heard about your firm

This information can help you evaluate whether you should expand services in high-demand areas and where to amplify marketing efforts (and dollars).

10

Communicate next steps to prospects

When responding to prospective clients, set clear expectations for what they can expect next from your firm.

Your legal practice management software will pull the prospect's information into document templates that instantly generate the necessary correspondence. This complete control over editable templates ensures new prospects receive clear and up-to-date communications that align with firm policies for declining representation, referring prospects to other resources, and engaging new clients.

What to do if your firm is unable to assist the prospect

Upload standard referral and declination letter templates to your legal practice management system so when a staff member indicates a prospect should be "declined" or "referred," it triggers workflows that automate the tasks and communications to decline to represent prospects and refer them to other resources. A fully integrated email platform syncs information from Gmail or Office365 to save time and transmit information reliably.

What to do if your firm is ready to schedule a consultation

Automated and online appointment scheduling saves you and the prospect time. With an integrated calendar, your software can send confirmation emails with the consultation date that a prospect chooses based on lawyer availability and meeting reminders. When the consultation begins, the lawyer can open the prospective matter file directly from their calendar screen, ensuring the appointment runs smoothly and new information is recorded.

11

Engage new clients with confidence

Client intake is just one of many processes you can make more efficient through a legal practice management software. When it's time to send matter engagement documentation to a new client, you can also automate the tasks and communications to:

- Send a retention agreement for signature
- Request specific documentation from a client based on matter type
- Instruct clients on how to fill out standard paperwork
- Send a video showing how to use the client portal
- And much more throughout the client relationship

Now you're ready to take your client intake process to the next level! These steps will help you work smarter while improving client experiences with your law firm.

Learn more about how Actionstep's customizable legal practice management software can streamline your client intake process and more. **Book a free demo here.**

About Actionstep

Actionstep is a fast-growing, dynamic SaaS business with a global customer base and team, specializing in the delivery of legal practice management software to mid-size law firms around the world. Actionstep combines CRM, Matter Management, Document Assembly and Management, Time and Billing, Trust and Office Accounting, Reporting, and much more in one adaptable cloud-based software platform for thriving modern law firms.

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