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Building a Better Client Intake Process with 6 Steps and a Checklist

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If your firm doesn't have a proper intake process, you could be losing a lot of billable time working on administrative and organizational tasks. In, Business Development 101: Online Communication Strategies to Increase Your Billable Hours we discussed how properly utilizing the various communication forms (phone, email, text, and website) can make a huge impact on your productivity and future revenue generation.

Today, we are going to dive deeper into the client intake process and learn how you can not only improve your process but retain better clients.

To start, let's do a little refresher on how potential new clients are handled.

How To Handle PNCs

Potential clients can be handled by you and your in-house staff or through remote and virtual services like paralegals, bookkeepers, and receptionists.

With software, you have access to resources like call routing and tracking, client intake automation, and calendaring management. All of these tools exist for you to reach as many people as possible with the least amount of leg work.

Responsiveness Through Form and Function

When you think about the form and function of the content and materials that you use to draw in PNCs, you need a combination of human and machine intelligence.

For the human intelligence side, ask yourself these questions:

- What goes into your lead nurturing drips?
- What does the copy (the actual words on the page) look and sound like?
- What are your lead-qualifying questions and intake-form compositions?
- What is your caller greeting?
- What does your email content look like? (From appointment confirmation to lead conversion drips)
- How do you handle 'bad' leads?

How you handle these questions all contribute to your firm’s brand. Not to mention the answers also set the tone for the initial impression you give a PNC.

On the other hand, machine intelligence is necessary to take care of the monotonous, orgnizational tasks. Consider these questions:

- Where is your client intake form hosted/located?
- How are leads and clients recorded and tracked?
- What happens after intake?
- What happens if a lead doesn’t convert?

Where the human intelligence is used to capture emotion and connection, the machine intelligence is used to speed up your back end logistics and take away some of the manual labor involved in capturing new leads.

Combined effectively, you will achieve fast, friendly, and accurate responses from PNCs which will lead to more qualified leads and a better experience for new clients. If you can keep them happy off the bat, you’re one step ahead of the game. Not to mention, if your current clients are satisfied, they are more likely to refer friends and family.

Lead Conversion Flow

Now that you have a firmer grasp on contact methods, let’s take a look at lead sources. Referrals make up a large source of new clients for firms, but what about cold leads? Where are those people coming from? Let’s take a look:

- Reviews
- Local listings
- PPC
- Social media
- Content & Freebies (downloadable pdfs, advice, forms, calculators, etc)
- Technical SEO to increase the visibility of your firm in search results
- Link building with other businesses

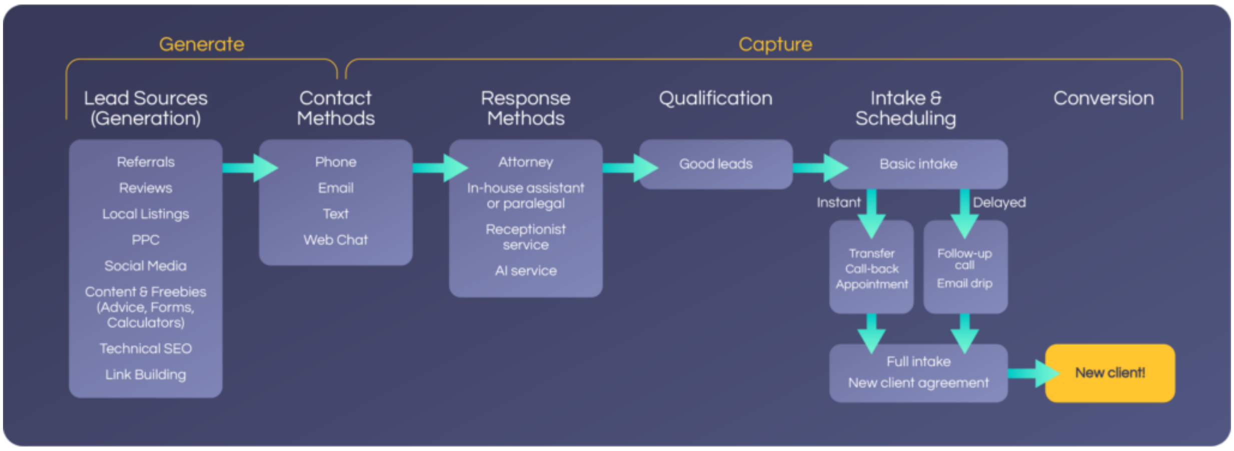
Now, once a lead has contacted you, spoken to whomever you have in charge of the response methods (whether the response is via a receptionist service, in-house, or directly from an attorney), you qualify that the lead is ready for a consultation, your next step should be scheduling a meeting to collect more information.

This process looks different for firm-to-firm, but at its core, you need to be able to track data efficiently and access it whenever you need it from wherever you are. We have created a great downloadable checklist attached to this blog for you to use as a guide, however, here is a high-level framework outlining what you should be tracking (at a minimum):

1. Getting started: When a PNC first makes contact with your firm
2. Confirm the PNCs basic details
3. Screen the PNC and do a conflict check
4. Approval: Initial consultation granted or denied
5. Gather pre-consult information (if you didn't have enough information prior to do to conduct a conflict check do so now)
6. Consult
7. Organize post-consult information
8. Send a over a new client agreement
9. Gather necessary documents

Now if you decide this person is not a good potential client, are you making referrals systematically? Referring out clients who are not a good fit with your firm not only highlights your good will, but it also gives you an opportunity to inform people of what your firm does so that in the future they can call reconnect with you. Additionally, if you refer clients to other firms in your area, they will be more likely to reciprocate that business when a PNC who isn't a great fit for them walks through their doors. Huge takeaway here - don't underestimate the power of a good first impression.

How to Leave a Good First Impression



Step 1 - Professionally and intelligently manage calls

Set up your phone so you're not using your personal cell phone number. A huge push back for texting clients is the lack of privacy. Although you would like to be available for your clients 24/7, you don't necessarily want to give them access to your personal information.

Some software offer services where they will provide you with your own private number. Through this you will have the ability to track text and call communications that will automatically be converted into billable events for you.

Once you have a private work number set up and ready, make sure you establish a professional greeting and menu. If a PNC calls you and wants to leave a message, that voice recording is the first form of communication they will experience with you. Don't set a bad tone with an unreputable sounding recording.

Next, consider blocking spam calls. In today's age where solicitors are around every virtual corner, it is important to protect your number as much as possible. You have no idea when or off what number PNCs will call you from, so if you have spam calls blowing up your phone in between client calls, this is a problem.

Keep in mind that PNCs have no boundaries when it comes to respecting your time. So make sure your phone is routed during holidays, vacations, schedule adjustments, and any times throughout the day when you are not available. You will miss out on PNCs if you do not have an action plan to capture their calls or messages when you are unavailable. Also consider having a separate after hours voicemail. For these messages, ask for more specific information and give them a time frame for when you will get back to them. This will encourage a relationship versus a one-off missed call. But, if you promise a call back during a specific window you better keep your word. Nothing will lose you a new client faster than unreliability.

Lastly, track performance! Where did the calls originate from? Did the source yield high quality leads? This information may not seem important in the immediate, but it is. Track this information so you know where your clients are coming from. Having this information will help you determine where to spend your advertising and marketing dollars. The best way to increase non referral based leads is to hone in on target demographic and geographic information. Additionally, know how many answered and missed calls you have. Monitor the number of rings it takes to pick up and keep note of the duration of your calls. It is also important that you have call recordings for performance monitoring. Track what goes well and things that don't. Your first job is to be an attorney, but your second has to be a business person.

Step 2 - Automate lead capture and qualification

The very first step here, and this is incredibly important, is to have your criteria identified. First think about who the potential clients are that you really want and maybe also the clients you have worked with in the past that you want to avoid. Additionally, who are the clients you missed? Who are the PNCs that you wished you had captured sooner or the people who may have not experienced your best foot forward.

Use this thought process to identify the criteria and systematically put in place either a form or a list of questions which you can then use to screen PNCs. When you determine if the PNC will make a good fit, implement workflows for qualified leads and incorporate new-client call-back or appointment procedures. Think about what form these call-backs will take place in, do you prefer phone call or email, and will you have a template for what you say that will encourage these people to use the most detail in their response?

For initial meetings, determine the policy on consultations. How long will they be? Twenty minutes? An hour? Will you charge for them? What format would you like to host them in? All of these details should be ironed out prior to speaking with anyone. Obviously customer service is important so if you have to make a special accommodation for someone, make it happen! You have no idea who they could be connected to or who they know, so always lead with kindness and consideration. It is important to note here that everyone has a different comfort level, video is very intimate, but not everyone is comfortable with it. Also keep in mind that some video software requires the users to download the app (like Skype). That is not always convenient for people who are either not very tech savvy or who simply don't want to download it. If you are to conduct in-person consults, consider the time you will lose in the commute and any potential traffic delays or last minute schedule conflicts that could occur.

We all know that attorneys charge for a finite number of billable hours each day, so ensure you're utilizing your time by automating the monotonous outbound tasks. For example, if you have people completing a contact form on your website, you can automatically forward those to the appropriate team members so that the call-back communication happens immediately. Set up workflows to make data collection and tracking easier for you.

Step 3 - New Client Intake

Following lead capture, begin completing the client intake process. Before you begin, it would be prudent of you to ask them how they heard about you or your firm. This is valuable data! Don't overlook it. (Your marketing team can thank us later)

Depending on your firm, your intake process may occur before or after booking your first appointment. And similarly to Step 2, identify the required questions you will ask and standardize this process across your firm. Aim for 5-10 questions and make it easy for these individuals to fill out the information.

Some software today will allow you to customize your intake form and when a PNC fills it out and submits it, the information will automatically populate in your system. Not only is this process efficient, but it is professional and allows you to capture the specific information that is pertinent to your firm.

Step 4 - Streamline Appointments

The most efficient and effective way to book appointments is by having a public-facing booking page directly on your website. The idea is to remove the amount of barriers between when a PNC first reaches out to you and when they become a client. Integrate this calendar with your own and make sure once a client submits a time that you are sending them the subsequent next-step information that they need. The sooner you can get this information to the client after they hit "schedule," the more likely it is that they will not only be on time, but that they will come prepared.

Utilize technology to also trigger workflows for your staff. Once a PNC requests a booking time, what does that mean for your staff? What needs to be done in preparation and who will be involved?

As mentioned in Step 2, consider whether or not you're going to charge a PNC for the consultation. The upsides to a paid consult include: reduced no shows and more guarantee that the person is a fit for your firm. However, some people see the cost and may raise an eyebrow. These are all things for your firm to consider, there is no right answer!

Step 5 - Bad Leads Out, Good Leads In

If you generate a list of PNCs who are not a great fit for you, but could be for another firm, utilize that to your advantage! However, some state Bar rules will not allow you to monetize referrals, so make sure you review the rules before getting started.

Your firm should have an implemented process for "bad" leads. Think back to potential client qualification criteria and use that to identify unqualified leads to save your time. Make a list of all attorneys and firms you recommend by practice area and share that list with your staff or receptionist service including instructions for identifying the correct firm to recommend to the "bad" leads. This could be based on location, practice area or cost. Think of referring "bad" leads as a service. Systematically earn good will in the community and educate future potential clients and referral sources.

Step 6 - Record, Record, Record

As much as possible, integrate as many of your communications into your existing practice management software as possible. Every text and call should be logged with pre and post consult notes. Activity logs on new appointments need to be documented, and triggered workflows should be assigned as action steps for your staff as a PNC flows through your intake process.

Use project and document management tools to integrate your emails and documents into your system seamlessly and automatically. With some software, you have the ability to build out document templates that can be automatically populated with new PNC information. This not only saves you time but reduces human error as well.

Having robust records of everyone you talk to will not only allow your firm to improve your intake strategy, but pinpoint what is working well for you so that you can continue capitalizing on it.

So What's Next?

Now that you have all this information, utilize the attached outline to start solidifying and building your intake process. Define what will be standardized across your firm and make it as easy as possible for PNCs to retain your firm!

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