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Does Your Intake Process Affect Your Bottom Line?

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There is a common aphorism that often gets applied to life that goes, *a rising tide lifts all boats*. And it's true in many cases. In good times, many businesses can see great returns, and the economy and emotional spirit of both large and small groups or populations of people can be elevated. But these past few years have been different. We are coming out of a really trying time, but something we have heard reiterated time and time again is that through challenging times, a firm's branding and marketing efforts become critical.

More importantly, when the going gets tough, the need to heavily rely on data to gain insights and direction becomes even more important as well. To be able to gauge trends and monitor consumer patterns is how firms will thrive through the chaos. For example, law firms that were marketing in 2020 saw a big drop in revenue in Q2, similar to firms who did not market, but, their leads and overall numbers were higher than they were in 2019 prior to the pandemic. And then into Q3 and Q4, they remained ahead of their previous years' numbers. The idea here is that although there were fewer people searching for legal services during the height of the pandemic, the jobs won went to firms that were consistently marketing.

Visibility and Searchability

The way people are finding law firms, especially via their websites, is significantly more fragmented than it has been. This fragmentation is primarily the result of the omnichannel environment we live in today. On any given day, you have people surfing Facebook, Google, local newspaper listings, online newsletters, podcasts, radio, the list goes on and on. The bottom line here is your potential clients are finding your firm in a lot of different ways.

Create and Highlight Content

Traffic from social media almost doubled in that second quarter during the pinnacle of quarantine, and surprisingly enough, it stayed almost 4% higher throughout the rest of the year than it did in 2019. We are seeing more traffic come from people on social media than ever before. And not only are these people spending more time on social media, but they are also actually taking the next step and going to law firm websites. The strategy here indicates that you need to be in more places online and the easiest way to achieve this is by producing content. Some of you may have read that and felt a wave of panic but don't worry! When you begin thinking about this content, think about the content your firm would be best at producing; the areas of expertise your attorneys, firm administrators, paralegals and the like possess and capitalize on that! And utilize your ability to repurpose that same content in other areas as well. For example, if you have a blog, consider using that material and making it a video.

Another thing to think about in terms of your content is highlighting and marketing all the technological advancements you have at your firm. If you utilize practice management software, publicize your ability to take online payments, publicize your client portal, automation capabilities, easy intake process, etc. All of those things are advancements that potential clients will look at and cross-compare against other firms, so use it to your advantage! Being able to highlight your customer experience improvements will only serve to benefit you.

Utilize the Internet

Search engine optimization is not going anywhere, in fact, it is driving more and more traffic to law firms. If you think about all the effort you put into gaining referral partners, whether it’s getting on the phone with potential businesses, sending thank you gifts, those couple rounds of golf, all the things you do to establish those relationships. Now think about how much time you're putting in the largest referral partner you have, which is Google? The benefit of Google is that most users are searching for something already. They are looking for an answer or help so not only will they be more reliable, but they will be more willing to work with you to get their problem solved.

Let’s walk through a hypothetical example. Take an estate planning firm, typically, they do a lot of in-person events to drive potential new clients and they really emphasize the need and highly encourage clients to come in for consultations. Well, in almost the blink of an eye, the world shifted to operating online. And now, the first consultation is a Zoom meeting, and those in-person events have transformed or disappeared entirely. So what happens now? In this case, the firm would need to change their website to support online intake and then direct the potential new client to a calendar scheduling tool to seamlessly book the meeting. With this shift, you can now market the efficiencies of this new online process and emphasize the benefits of putting time back in your client's day by reducing commutes and streamlining the intake process.

Ultimately, all the things you are doing to help your law firm be more efficient and effective are also the way your clients want to work. So remind them of the pain of doing things the “old” way and market your services as ones that meet their new needs.

The Intake Process

Now that we have gone through some marketing strategies, let’s think about the ways that you can connect and hopefully get those new clients to contact and hire you. The next challenge that many firms face is how to manage the intake process. How do you manage the volume of calls and digital messages coming in? The issue that arises here is that there is a finite number of hours in the day, but clients don’t care about that, they want a response as soon as possible. And the sad reality is, people are impatient, if they don’t hear back on their time frame, they will find another firm who will.

The pandemic has obviously caused a lot of disruptions. But what has that meant for attorneys and firms? What solutions have been implemented to improve the client intake experience and ensure that responses are efficient and uniform?

System Dependency

Overall, the best way to maintain an elevated client experience is to be system-dependent and not owner or operator-dependent. Think about the lack of availability you may have on a day-to-day basis, between your personal and professional life, handling operations, HR, administrative tasks, everything that you have on your to-do list leaves very little time to handle those inbound inquiries that come to you. You still want to be responsive to both your existing and current clients, but also to your potential new clients and referrals. It is really critical that you set up systems that can be responsive for you, and bring in the technology and the talent that is on your front line. What we saw last year was a lot of people quickly added new technologies that acted like a bandaid or patch. And now what we're seeing today is as people begin to recover, they notice the holes that they patched and they want to make it look better. They want to make it look great because after all, it is the reputation of their firm that is at stake.

Easy Automation

Making it easy for PNCs to select an available time for a consult without disrupting your day-to-day is the easiest first step to enhance your client experience with minimal effort. Not only will this calendaring automation speed up that first initial contact with the client, but it frees up your staff and it is easy to manage with minimal training in the case that you do need your receptionist or team to step in and intervene. Also, it's important to keep in mind that everyone faced disruption this past year. So while you're working hard throughout the day, your clients are too. Sometimes, it isn't until 10 PM at night when a PNC will come home and have the brain space to think about those divorce papers, mergers, settlements, etc. So giving people the silent comfort of choosing availability on their time is priceless. And we are not saying that you have to answer your cell phone and email at all times of the day, but you do have to be responsive.

The next piece of this intake process revolves around legal workflow automation. The reason why legal workflow automation exists is that law firms needed to find a way to reduce the administrative tasks their attorneys take on and give them more time to focus on creating billable hours. Let's walk through some examples... when a PNC gets created, you can use a workflow to automatically alert your team that work needs to be done. You can automatically schedule a conflict check, confirm that the PNC's data is entered correctly, and verify that your attorneys can take on the workload. Not only is this eliminating inefficiencies, but it is increasing team communication, and enhancing your client services. You can also eliminate the monotonous task of creating letters of engagement or other documents with document merge. This allows you to automatically generate a document based on fields within Centerbase instead of manually typing each document and filling in the respective detail. You can create the initial template and set which information fields you want to be pulled to populate the document.

Legal workflow automation is meant to help create efficiencies and reduce human error. If you're not adopting these technologies or working with software that enables your firm, you're doing yourself and your clients a disservice. If you're curious to learn more about this, check out this video.

The ways we are consuming and interacting with each other as consumers and businesses have changed a lot in response to the disruption of the pandemic.

Communication Expectations

A lot of what has changed in the last two years has been expectations. Today, clients are fully expecting that you guide and steer the process. So you must ask yourself, how do you make sure that you're delivering on what the client needs? How are you producing content and answers on all the channels that you operate and are publicly available online? Every platform your brand is listed on needs to uphold the same level of responsiveness. And it's not just about the speed, it's about the quality of content. One of the main reasons clients won't move forward with a firm is because they don't get the answers they're expecting. Easily combat this by proactively anticipating the commonly asked questions. Time is thin right now, and if you think about the importance of lead screening and qualification, not everyone is going to be a good fit for your firm. So it is one thing to get out in front and be responsive but you also don't want to be taking consultations with just anyone on the internet who finds your firm and books your time.

The 2 Keys to Success

So after all of this, what are some of the most successful law firms doing when it comes to their intake process? Well, two things come to mind… the first is when you're system dependent, you have to be constantly checking and monitoring those systems. That is simply a good habit that is just a matter of professional responsibility. It may not say it very specifically in the bar rules, but triple-check that when someone calls your firm the phone is answered and to your liking. Make sure that when someone sends an email and you have generated automated responses that the email is being triggered how you want it to, that it is being received, and that it also reflects the brand and voice of your firm. There are a lot of systems that are only being set up once and then forgotten and never checked again. Because of this, a lot of business is lost because no one has been assigned to that voice mailbox or that email account. If you don't check them, that is a blindspot that is aiding a loss on investment for all your marketing efforts and all the other energy you're putting into promoting and advertising your firm.

The second thing that successful firms are doing is following up with those individuals who reach out. This step can often distinguish the haves and have nots. What happens is the more you follow up (to a certain limit), the higher the payoff. Six points of contact are about the threshold here. Statistically, if you're following up only once, we know that about 50% or slightly less of your inbound calls are being answered. There is so much distraction and noise these days that if you're not following up multiple times, your message won't be heard. It's as simple as that. Depending on the practice area that you operate in, that will also really set the cadence. So when you ask, "How often should I follow up?" You have to take note of who your clientele is. If you are in personal injury, high-end estate, or intellectual property, you should be following up a lot sooner. Don't give up and throw in the towel until the person has told you they have made the decision one way or another. That type of chase is incredibly beneficial to the bottom line.

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