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How to Improve Your Client Onboarding Process

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A successful [attorney-client relationship](#) begins with the [client intake](#) process. Not only does it formally introduce the client to the firm's procedures and requirements, but it also helps firms identify potential issues that could cause delays during representation.

A lot of firms operate with unsystematic onboarding procedures that vary from one client to the next, and these bad habits can thwart successful client relationships.

Improving the client onboarding process requires both efficiency and simplicity.

With the right tools and the following tips, law firms can create a client onboarding experience that is quicker and hassle-free.

Pre-Screening Process

With a pre-screening process, law firms evaluate potential matters to identify any issues before the onboarding process even begins, saving valuable time and resources.

This can be accomplished in a number of ways, including:

- A mandatory [client intake form](#) on the firm website that clients must complete prior to their first appointment
- An automated data-gathering email initiated at the client's first contact with the firm, requesting preliminary information about their case
- A legal practice management system that includes conflict checking features

Standardized Data Collection System

Organization is key to simplifying the onboarding process, so you need a standardized system that repeats the same general procedures for each client's onboarding experience.

This may involve such tools as:

- Pre-printed forms tailored to the firm's specific areas of practice
- Preliminary review of completed forms by a support staff member to ensure accuracy before initial attorney review
- An intake checklist to track the progress of all initial agreements, acquisition of all necessary information, and payment of all required fees

- Standard intake questions designed to expediently secure adequate information from clients during the onboarding meeting

Remote Capabilities

While some clients may prefer to meet in person, others do not have the time or ability to come into the office for an intake meeting. Remote onboarding capabilities provide clients with the convenience and accessibility that they appreciate, demonstrating a commitment to client service and respect for your clients' time.

You benefit from remote onboarding capabilities by starting the client relationship on a positive and efficient note. For example, when coming into the office for an intake meeting, a client may forget to bring important information that is needed for their case. However, when meeting remotely, they can participate from a location where they have access to all relevant documents and records, effectively avoiding potential delays in the initiation of representation.

Calendaring

No attorney wants to start their representation of a client by missing the first court appearance, but that is exactly what can happen as a result of inadequacies in the client intake process.

That is why [calendaring](#) should be a regular part of your onboarding process. When clients come in with court dates or deadlines already in place, those should be immediately added to the firm calendar to ensure that they are not missed while all onboarding forms are reviewed.

Tracking New Clients

Law firms need a [practice management system](#) that allows them to store all onboarding and client information in a centralized location that helps keep track of both new and existing clients.

These platforms help ensure that nothing falls through the cracks between onboarding and initiation of work. Consider the following:

- When notes are taken by different firm members during the various steps of the onboarding process, it can lead to disorganization. [Electronic notes](#) are easy to use, trackable, and accessible to everyone working on the matter. When used correctly, they help to promote the provision of quality representation.
- Some legal practice management systems allow firms to set reminders or alerts for specific actions on a case. For instance, firms can set a reminder for a client that requires a callback following onboarding or for a client that needs to provide additional documentation. Having these safeguards in place helps streamline the representation.

Efficient client intake begins and ends with the systems and tools that law firms implement. The right legal practice management software can prove instrumental to handling this important start to legal representation, thereby enhancing clients' experience at your firm.

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