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Improve Your Law Firm's Client Experience With CRM and Intake Software

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Your law firm cares about its clients. Retaining information for those clients while keeping matters organized and accessible is critical to providing optimal client service and maximizing [billable time](#).

But [client management](#) is often a nightmare for law firms. We both know that keeping hard-copy records is an inefficient use of time and space. Plus, you never can find what you need just when you need it. And setting up an individual spreadsheet for each new client can prove tedious and frustrating.

Enter client relationship management (CRM) software (also known as “customer relationship management” software outside the legal industry).

CRM systems can help your law firm create a client-focused environment where your clients feel valued — while your firm reaps other benefits. Through organization and enhanced efficiency, CRM software helps your law firm maintain and strengthen business relationships. CRMs can help you keep your eye on the prize by prioritizing clients and ensuring that no growth opportunity goes unnoticed.

But it can be hard to decide which CRM is right for you. Multiple law firm CRM options are available today in the market. Below, we'll guide you through what to consider as you evaluate the best solution for your law practice.

What is CRM software, and what does it do?

Put simply, CRM software helps law firms manage wide-ranging business development functions. These functions include [client intake](#), client scheduling, and follow-up, automated [marketing](#) tasks such as email campaigns and reminders, revenue tracking, and [workflow](#) simplification. The right CRM software can help your law firm systemize its approach to maintaining client relationships. It's a critical piece of your overall marketing plan and, in turn, essential to your bottom line.

In sum, CRM software can help your firm turn potential clients into retained ones while also helping you strengthen relationships with current clients. Think of it as a magical Rolodex.

How can a CRM help with client intake and with providing a

better client experience?

You never get a second chance to make a first impression. For your law firm, intake is the first communication with a client and the perfect opportunity to impress with your firm's [client-centered approach](#). As you already know, [legal practice management software](#) streamlines procedures like client intake forms and onboarding new clients. Consider a CRM as another piece of this efficiency pie.

A pivotal part of growing your firm is understanding the client lifecycle. With this knowledge, your law firm can personalize and systematize each step within that lifecycle, maximizing efficiency and profit. This is where CRM software excels.

CRM software can help your law firm streamline the intake process, including client communications and correspondence, document exchange, internal data sharing, and even processing bills. You'll eliminate duplicative tasks, have more time to do substantive legal work, and ensure that your first impression is flawless.

An improved [intake process](#) and the right [integrated tools](#) can help your law firm start working on a matter as soon as possible. These, combined with CRM software, will provide your clients with the best possible experience.

How can my firm get started using a CRM?

It's easy to get started with a CRM. The first step in getting oriented is understanding which CRM best suits your firm's needs.

Take some time to consider where your firm's biggest inefficiencies are and where you see the most growth potential. The right CRM solution can help with efficiency while also helping your firm grow. Then consider these four options.

- **Analytical CRM:** As its name implies, analytical CRM software emphasizes analytics and reporting. With this type of CRM, your firm can gather, organize, and review client information. Over time, studying this data will help your firm strengthen its business model by showing you how to optimize your marketing campaigns and sales efforts.
- **Collaborative CRM:** Collaborative CRM software fosters connections between your administrative staff, marketing department, attorneys, paralegals, and others. The purpose of these connections is to create a streamlined, efficient network for sharing client information. With collaborative CRM, your clients don't need to give the same information to various departments, and those departments can stop chasing each other for client details.
- **Marketing CRM:** With marketing CRM software, all of your contact data is in one convenient place, and your firm has a one-stop shop for automation for legal marketing and regular contact with clients. For example, this software usually includes automated workflows that allow your firm to track how often prospective clients open marketing emails — meaning that you'll discover when it's time to reach out and close the deal. This CRM software is typically best suited for larger firms that want to strategically build their client base.
- **Operational CRM:** Operational CRM software is a common tool that most law firms use. This CRM software will help your law firm manage its customer service, marketing, and sales operations. Operational CRM automates the marketing process by tracking client interactions throughout a matter or case lifecycle. This allows teams to offload tedious manual work and instead focus on the client experience.

Are certain CRMs specifically designed to help law firms?

When conducting your research, you're likely to find there are endless CRM options. We recommend taking your time and thinking about your law firm's needs (including its budget) and how CRM software can meet those needs.

Be sure to consider which CRM best supports your legal practice. For example, Salesforce is an immensely popular CRM across all industries. But Salesforce might offer more features than you need if you're a smaller or midsize law firm. And if you're still exploring your technology options, you may think a solution like [QuickBooks](#) is all you need because it stores your clients' information. But it doesn't do anything to manage your client pipeline.

Here are five options that you should consider.

1. HubSpot

[HubSpot](#) is one of the legal field's most popular CRMs. It's free and useful, and if your firm grows in the future, HubSpot can also support expanded operations and needs. HubSpot allows your firm to track social media hits and interactions. It also offers valuable workflow functionality, including marketing tools such as email automation and scheduling follow-up emails based on website hits. HubSpot will provide your firm centralized access to important client insights and assist in better managing your sales pipeline.

2. InTapp

[InTapp](#) is a CRM solution built for the corporate world. It's used by many of the biggest and most prestigious law firms. With Microsoft, email marketing, and billing system integrations, it has much to offer mid-sized and small law firms looking to up their game. InTapp also offers social media functions and various mobile apps to allow your lawyers to stay connected and bill on time.

3. InterAction

[InterAction](#) is LexisNexis's CRM software that turns your firm's contacts into business opportunities with client contact management and data collection. InterAction focuses on building client relations and generating leads through easy-to-use CRM applications that leverage client data. With its comprehensive approach to data control and quality, InterAction also helps your firm create a more efficient workflow that will help it develop opportunities for growth.

4. Lawmatics

[Lawmatics](#) is another law-focused CRM software. It offers solutions by practice size, so whether you're a solo practitioner or a small, medium, or large law firm, Lawmatics has software designed to help your firm thrive. This CRM includes many basics you would expect, like enhanced automation options and customizable emails to help with marketing campaigns. It also offers graphic-forward systems, including a pipeline management system to track the nitty-gritty of client acquisition, advanced custom fields to capture comprehensive client information, and a built-in suite for e-signatures.

5. Law Ruler

[Law Ruler](#) is a CRM solution that collects and organizes information about a law firm's leads, prospects, and current clients. It includes marketing automation tools, including personalized emails and text messaging for lead nurturing. It also supports client intake with custom form building and templates. It rounds out its offering with a robust set of analytics and customizable reports.

The next step is integrating your CRM with other legal technology

Any of the CRM tools mentioned above can help your law firm optimize and streamline daily operations while keeping an eye on your growth. Coupled with an improved [intake process](#) and the right [integrated client management tools](#), your law firm can spend more time focusing on its top priority: serving clients.

The right combination of legal software, including CRMs, case management software, document management systems, and invoicing solutions, can help your law firm give clients the best possible experience. The key to ensuring use is integrating your systems as much as possible, reducing the administrative burden on your lawyers and your clients. Look for a CRM tool that works with your firm's existing legal technology suite, and you'll reduce implementation and adoption headaches.

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