How to improve client intake without hiring more employees: a guide for law firms.

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those don't convert to the numbers of clients you would expect.

What's holding you back? It could be your client intake process failing to turn good prospects into clients.

Why client intake matters

Lawyers usually don't think of themselves as salespeople. But intake is an essential part of delivering legal services. You can't represent a client if they don't retain you.

Put yourself in the shoes of someone who needs a lawyer. They don't know the law. They're stressed out. Their number one priority is to find a lawyer they can trust to take care of their problem. And they want to do it fast.

A 2018 survey by FindLaw showed that 61% of people who need legal representation only contact one attorney. And 85% of them hire that one attorney.

If you don't respond effectively to people who try to make you that one attorney, they'll move on.

Why some law firms struggle with intake

Complex client experience

Most firms have put time and effort into creating their intake process. However, it can be challenging for attorneys to see their processes from a prospective client's perspective.

multiple steps and contact points, people won't stick around to find out how much you could help.

The goal of your intake process should be to make it as easy as possible for the client to retain you.

Communication issues

Communication is part of the client experience, but it's important enough to focus on.

Think back to what we know about a client's mindset. They have a problem they can't solve on their own. The stakes may be high—their financial well-being or even their freedom could be on the line.

People under stress want to be able to reach someone who can calm their nerves and give them confidence that everything will be okay in the end. And they want this quickly. If they can't reach you by phone, if their emails go unanswered, if they don't feel like you're there for them—they won't be happy with your representation.

Inefficiency

Client-facing aspects of intake, such as the client experience and communication, are vital. But there's an internal dimension, to ensure you have the right data in the right place.

When you gather information about your client or prospect, what do you do with it? Do your internal processes involve a lot of paper and manual data entry? Or are you taking advantage of the software tools that exist to facilitate this kind of work?

Ideally, your legal intake should involve enough automation and software integration to make it efficient, without losing the personal touch.

Empathetic

In the end, practicing law is about helping people resolve problems. As we consider how to create a great intake process, we can never forget who we're intaking – people.

Empathy—understanding the person you're speaking with—is the most important thing to keep in mind as you design processes for your law firm. When you put their needs first, you're on the right track. If your intake process seems difficult, impersonal, or stressful to someone outside your firm, stop and think about what you can change.

Streamlined

Keeping your process streamlined is linked to considering intake with empathy. A streamlined process is easy to understand and navigate.

Review your client intake and pay close attention to where people get confused or frustrated, and most importantly, where they drop out of the process altogether. Focus on those points to smooth out the obstacles.

Customized

Your intake process should be flexible. Each client, and each case, is different.

It isn't practical to have a unique process for every prospect. But your intake script should be like a flowchart. At key points, the specific information you get from the prospect should inform what happens next.

Professional

If you do have intake specialists, make sure you keep them up to date on what you've learned from analyzing your process. When you make changes, implement them consistently and monitor them to make sure they are having the right impact.

Transparent

One area where many law firms fail is in being transparent with their clients about the timeline of their case. Of course, it isn't possible to know this with precision ahead of time.

But stressed clients might assume any delay means disaster for their case. This can result in more calls to your firm, and more time spent reassuring them.

Pre-empt their concern with transparency. Let your client know what they should expect to happen next, and when. If you can't be precise, tell them this frankly. Again, this is about empathy and earning your clients' trust.

Working on your client intake process

Legal intake is different from the sales processes in other industries. However, it is still useful to outline the journey potential clients take from discovering your firm to signing you for their case.

Understanding your intake process, often called a funnel, will help you make sure you're providing the right experience and communications to your prospective clients at the right time.

A typical legal intake funnel works like this:

The most important thing at this stage is that you are there to respond to them within an hour.

Leads are 8x more likely to answer a response within the first hour of submitting their inquiry than within two hours.

CallHippo study, 2020.

Lead capture and qualification

Recording the contact information of your lead is critical. Use a customer relationship management (CRM) application for a smooth, efficient process for everyone concerned.

Not all inbound calls are of equal value or relevance to your firm. Some may be solicitations or wrong numbers. Some of your callers will have a valid case, but it might not fit your practice area. Determining this promptly saves both parties time and energy.

Conversion

Ultimately, the goal of legal intake is to win the client. Making retaining you easy for your prospects is essential.

This is a good time to remember that your client most likely isn't a lawyer. They don't have a lot of experience with lengthy contracts. And when you ask them to sign, you're asking for their trust. Be sure you're earning that trust.

Analysis

You can ask for feedback from clients after their case has been resolved, as well as monitoring data from your website, CRM, and phone provider.

How to improve intake without hiring

Designing and implementing a great client intake process isn't rocket science. But it doesn't just happen on its own, either.

As an attorney, your time is extremely valuable—and this is probably reflected in your hourly rate.

While intake is critical to your firm's success, performing these tasks isn't necessarily the best use of your own time as a solo practitioner or partner.

A good legal intake specialist service can help you make sure your intake process is robust and effective.

For a fraction of the cost of an in-house employee, you can have real people answer your phones and respond to inquiries 24/7/365. You can design the call flow and integrate your service with the software you already use.

Above all, you can maintain the freedom to practice law, confident that your intake process is working behind the scenes all the time.

Discover how much more legal intake professionals can do for your firm. Call LEX Reception's experienced team on 800-800-9995 to learn more.