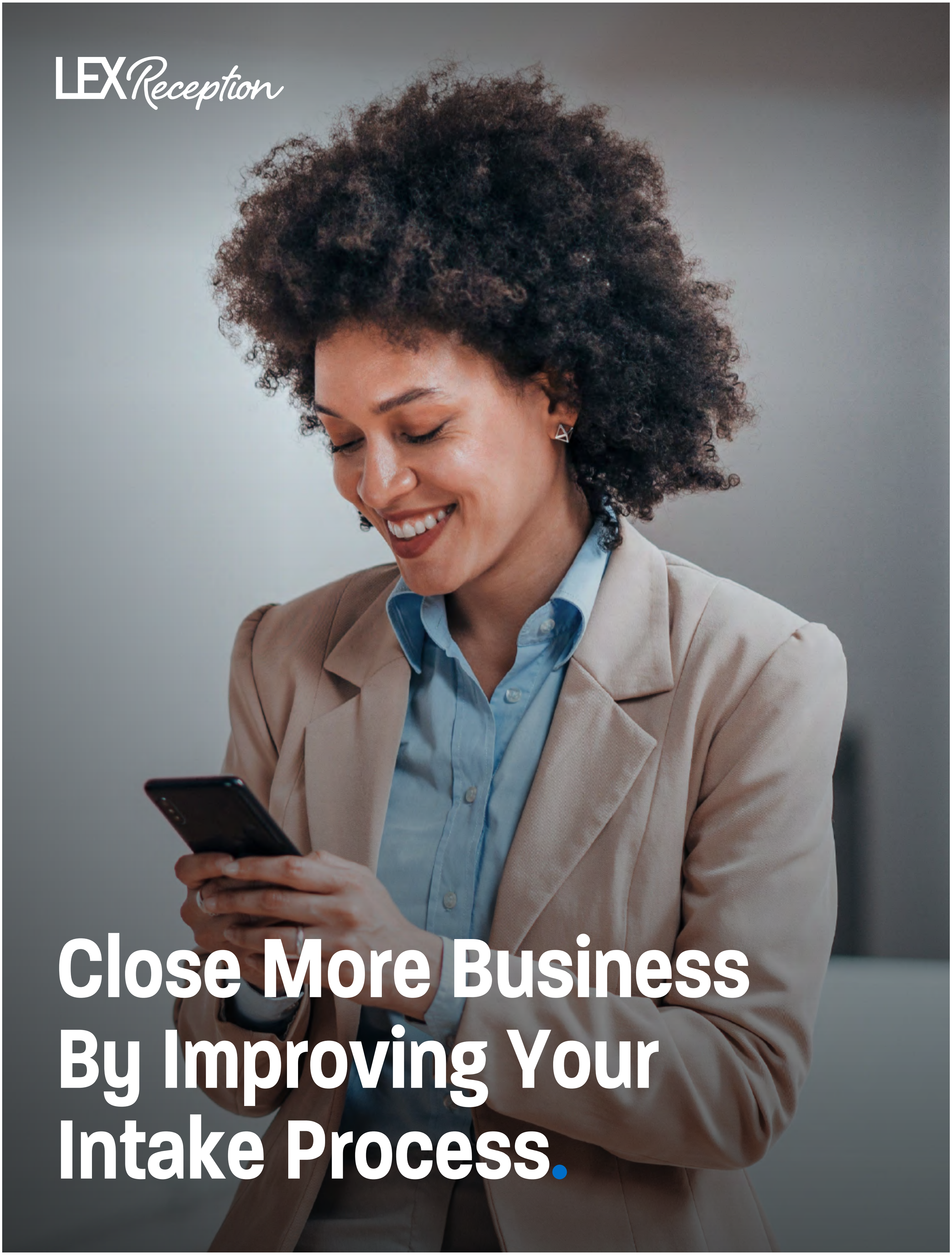


Close More Business By Improving Your Intake Process.

Introduction: Why the first hour is the most important?

Today's consumers are more impatient than ever, which is why fast response times have become critical for law firms to win clients.

Response time impact leads.

If you fail to follow up with a lead within the first hour after they submit an inquiry, you could lose that prospect forever.[1]

38-52%

of business goes to the first responder and your chances of speaking to a prospect who inquired drops as much as **8 times** after the first hour.

Firms that attempted contact with potential customers within **1 hour** window are more likely to qualify the lead.[2]

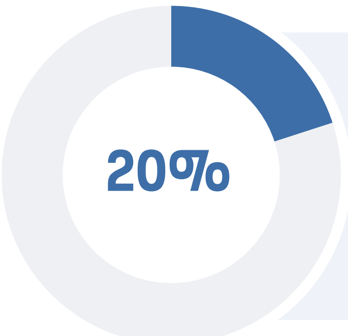
7x more successful than those who take more than 1 hour

60x more successful than those who take 24+ hours

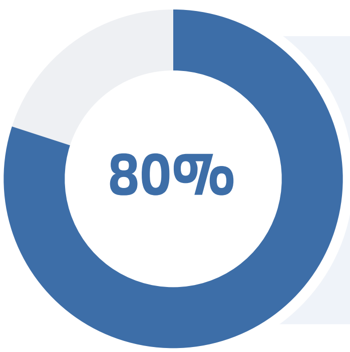
How much is one call worth?

A legal answering service picks up when your in-house staff goes home. Most potential clients won't wait for you to call them back—they'll move on to the next law firm on their list.

Implementing a service to answer your phone, answer basic questions about your law firm, and take a message allows you to win clients that would otherwise go to your competition.



of our legal clients' calls come in **outside of business hours**. This means you could be missing out on a lot of opportunities when your office is closed.



of callers sent to voicemail **don't leave messages** and not answering the phone becomes a potentially costly problem.

PRO TIP

Answering the phone with a smile can make closing sales easier.

Give a great first impression.

Even when you're busy, you want to show potential clients you care. Here are some techniques for demonstrating client service when taking calls:

1. Show empathy.

Show understanding of the client's problem. This involves mirroring the caller's tone and paying attention to what they are telling you - not just from a legal perspective, but taking account of their emotional needs too.

2. Build trust.

Use clear and concise language and avoid jargon that the caller may not understand, which can create confusion. This ensures that the person is comfortable enough to give you their necessary client intake details.

3. Minimize call distractions.

If you work in a busy office, or you're in the middle of working on a case, it isn't always easy to avoid. Focusing on intake calls is crucial, so consider how you can move to a quiet space or pass the call to another person on your team.

84% of the message given over the phone is in the tone of voice—making that "smiling tone" imperative.[3]

Source: Velocify

What goes into a successful intake?

Typically, lawyers don't think of themselves as salespeople. But intake is an essential part of delivering legal services. Your potential clients don't know the law. They just know that they need a lawyer and that they're stressed about the upcoming legal process. Their priority is to find a trustworthy lawyer to take care of their problem. And they want to do it fast.

For successful client intake, follow these steps:

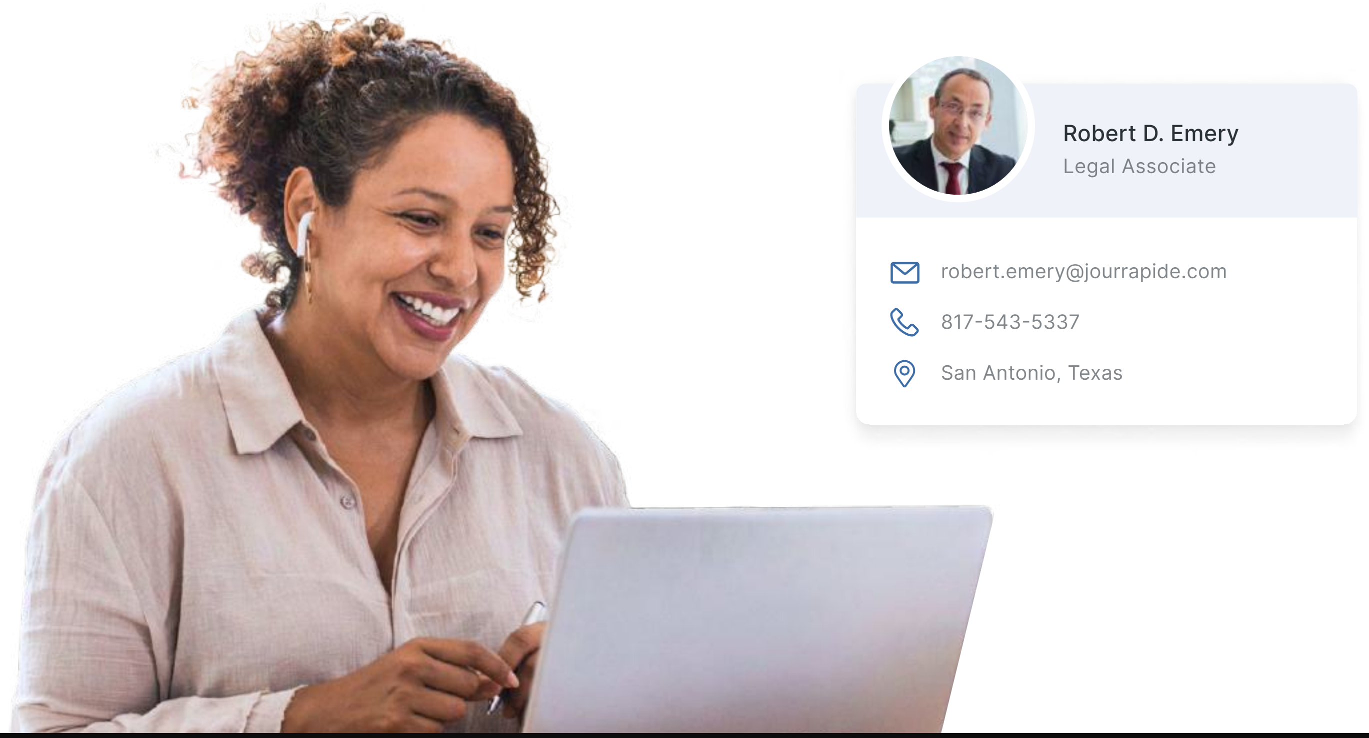
1. Always have a notepad.

2. Ask for permission.

Tell the caller how long the intake will likely take. People might not have the time at that moment to go through the whole intake process. It's better to arrange a call at a time that works for the caller than have the process cut short by their schedule and have half-answered questions.

3. Gather their contact details.

Be sure to take their name, phone number, and email immediately. This is important in the event of a disconnection.



4. Deploy active listening skills.

Active listening is a practice used by legal intake professionals to make sure that you really hear what the client is saying.

69% of clients want professionals to listen to their needs.[4]

Source: HubSpot

5. Take detailed notes.

Doing so enhances the caller's experience and helps your firm later on with comprehensive information.

6. Ask specific questions.

To keep the call on track, have a list of specific questions ready to ask a potential client. These will help you to identify whether this client is a good fit for your firm, and make sure that you have the correct information to progress with the case.

This approach saves you and your potential client time.

7. Don't overpromise.

People calling law firms are naturally impatient and keen to tell you that their issue is urgent. However, unless you are speaking for your own case, try not to promise more than your team can deliver. Avoid language like "as soon as possible", or "shortly". These phrases are too vague and can often be misunderstood.

Instead, tell them that you will explain the urgency of their case to the legal professionals handling the case—and that they will call them back. This method reassures the client that you understand their concerns while avoiding making promises on someone else's behalf.

8. Provide clear next steps.

Giving the caller some next steps reduces the chance that they'll reach out to other firms with their legal matters and reassures them of the upcoming process. Let them know what they can expect to happen next, whether that is an email, phone call or consultation meeting.

9. Get a commitment.

To avoid leads continuing to shop around after you've spoken to them, get a commitment by organizing a callback or meeting on the intake call. Once a potential client has a commitment to meet with your firm, they will feel more loyal towards you.

A successful call should leave the caller feeling relieved and confident that they have support on their legal issue.

A CRM (Customer Relationship Management System) aids and streamlines the intake process, so consider investing if it's right for your firm.

PRO TIP

Ensure you have time to take the call. Intake calls can take between 5-20 minutes.

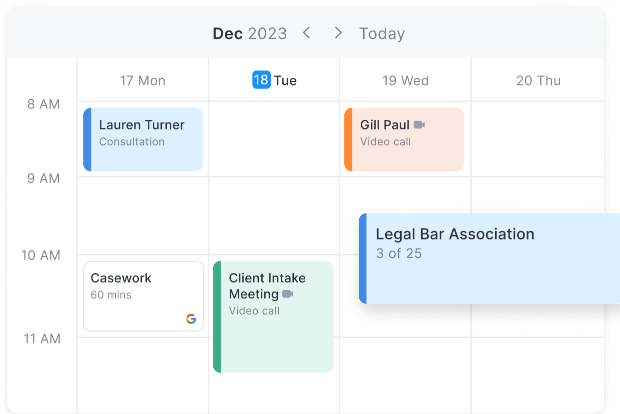
How to get a commitment.

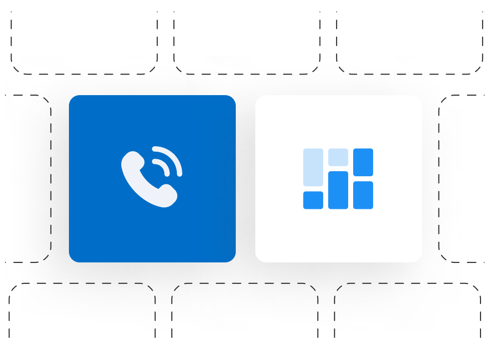
It's one thing saying, "Get a commitment", but how do you do that on an intake call?
Firstly, think about your scheduling setup. What scheduling tools do you have readily available to seamlessly book in calls?

Try a scheduling tool like Setmore.

These intuitive tools can automate appointment bookings and send out reminders and follow-ups — all of which can significantly reduce no-shows and cancellations.

Automated scheduling tools save both time and money. Use a system that provides real-time availability to avoid double bookings.





By integrating these scheduling practices into your intake process, you not only make it more likely that the caller will commit to an appointment, but you also lay the groundwork for a consistently organized and professional future client relationship.

PRO TIP | Always ask the caller the best time to contact them.

Scheduling tools save users an average of 4 hours each week.[5]

Source: Calendly

Other contact methods.

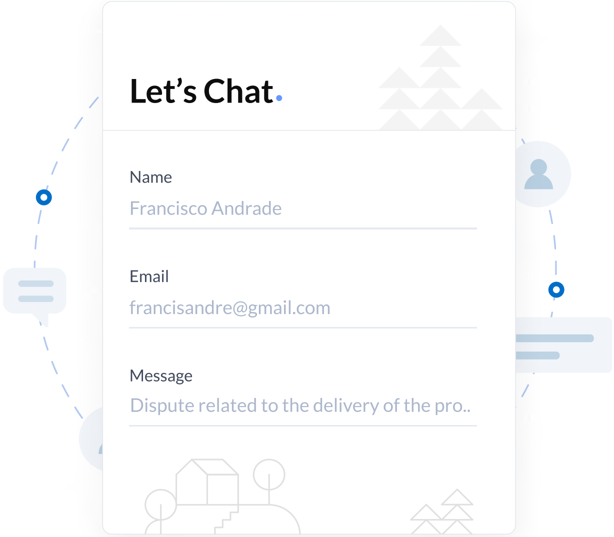
There are many reasons why your firm may not always be able to pick up the phone.

Providing alternative contact methods is a great way to ensure potential clients' inquiries are answered quickly—when you're not instantly available to take calls.

1. Contact forms.

Ensure that your forms are concise and user-friendly. They should ask for essential information such as the potential client's name, contact details, and a brief description of their legal issue.

If you have automation in place, once the form is submitted, it can trigger an immediate automated response acknowledging inquiry receipt, together with a realistic time frame in which they can expect a follow-up.



This assures callers that their concerns are being taken seriously. Web forms that integrate with a CRM system ensure no inquiry falls through the cracks and contribute to a streamlined and consistent follow-up process.

2. Webchat.

Live chat functionality on your website provides an immediate touchpoint for potential clients. Many first-time clients don't know what to expect from a firm. If you can provide an instant answer to a question from a prospect, this will leave an excellent impression and leave them disappointed in other firms that may take longer to respond.

It's essential that this tool is manned by a real person who can provide real-time assistance. The use of chatbots can be a first line of response, especially after hours, but they must be programmed to hand off to a human when complex or sensitive issues arise. This experience can also be frustrating for clients.

Implement a process for your CRM to ensure that chat histories are saved and linked to client profiles to allow for personalized follow-ups and continuity in client interactions.

79% of businesses in the US say live web chat services improved sales, revenue, and customer loyalty.[6]

Source: Kayako

3. Email and social media.

Emails are a staple communication tool, but in a fast-paced legal environment, they are easy to overlook. Introduce an email response system where client emails are flagged and responded to within an hour during business hours.

This quick response time can set your firm apart from competitors. To achieve this, you might need staff dedicated to monitoring this channel or have an automated system that helps prioritize incoming client emails. Also, consider setting up auto-responders for off-hours, so clients know when to expect a reply.

Inquiries via your social media channels can provide valuable leads. Encourage your team to respond to private messages or comments promptly, treating them with the same urgency as emails or phone calls. Establish protocols for moving these conversations from public to private channels when necessary to maintain confidentiality and professionalism.

PRO TIP

Regardless of the contact methods you use, it's essential that you display them clearly on your website. Make it as easy as possible for potential clients to contact your firm.

Moving swiftly on with an effective intake process.

A solid legal intake specialist service can help you implement a robust and effective intake process.

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. Choose the design of 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 hard for you behind the scenes.

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5. Calendly - Getting started with Calendly 2020
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