The 4 Stages of Client Onboarding for Law Firms

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The intake process is an important part of the overall client lifecycle. It's essentially the series of steps required to convert prospects into paying clients, or in other words, it's the law firm sales process.

Yet despite its importance, few law firms have put much energy into optimising their intake process to create a better client experience, increase their efficiency, or improve the firm's conversion rate.

A poorly developed intake process can result in disorganisation, wasted time, and lost revenue as potential clients slip through the cracks.

By improving the intake process, law firms can increase their conversion rate and their ROI from marketing, and improve client satisfaction at the same time.

Below are the four key stages of an effective client intake process, including some tips for ways to optimise each stage for success.

Stage 1: Acquiring and nurturing leads

The client intake process begins whenever you capture a "lead," otherwise referred to in the legal industry as a "potential new client."

Leads might come viareferrals, advertising campaigns, website traffic, or a variety of other channels. They might call your office, send you an email, fill out a contact form on your website, or come from a paid lead generation service.

Regardless of the source or the method of contact, your client intake process should begin at the exact moment when you receive the initial phone call, email, or contact form submission.

It's easier than you think to make mistakes with lead management, from responding too slowly, to not tracking your leads, to not following up, and more.

These mistakes can have a severe impact on your conversion rate (i.e., the rate at which leads convert to paying clients) and the health of your business, which is why implementing a lead management system is a key first step toward improving your overall client intake process.

3 Best Practice Steps For Acquiring Leads

1. Track every lead in a CRM system

Post-Its and Excel sheets might get the job done when you're just starting out as a solo lawyer, but they won't cut it as your firm starts to grow and receives a greater influx of new inquiries and clients.

The single most important step you can take to optimise your lead management process is implementing a proper legal CRM system for tracking each lead, recording their contact information, and setting reminders to follow up.

2. Use a virtual receptionist to answer every call

Nothing will turn a prospective client away like an unresponsive law firm.

Unfortunately, clients expect to be able to communicate with lawyers at all hours—the2022 Legal Trends Report showed that 68% of clients want to communicate with lawyers after hours while 68% want to communicate over the weekend.

According to the Solicitors Regulation Authority (SRA), the most common complaint received about firms from their clients relates to delays in responding.

By using a virtual receptionist service, you can ensure that every single call from a prospective client will be answered by a real person, even on evenings and weekends.

This responsiveness can go a long way toward improving the client experience and building trust early on during the intake process, which is key to maximising the likelihood that a lead will convert.

3. Use automated drip emails to nurture cold leads

During the early phases of client intake, your actions will often depend on how "warm" the lead was when they first contacted you.

Some people might call your office ready to hire you, which means you can jump straight to a later stage of the intake process. For instance, you might have your receptionist schedule a consultation on the spot, or potentially even draft a fee agreement in certain practice areas like personal injury.

However, often your leads won't be this eager. Colder leads will require more interactions to nurture them toward taking the next step in the intake process.

A great way to accomplish this without spending all day following up with people is to send out "drip emails," or automated email sequences.

These emails can include things like educational content, testimonials from past clients, and other information that will help build your potential client's trust and keep them engaged.

There are a variety of email marketing solutions that offer this functionality, such as MailChimp, SEDNA, and others. You might even find some of these features built directly into a CRM, such as the drip campaigns and email automation features offered by Clio Grow.

Stage 2: Scheduling a consultation

Once you've acquired a lead and started to build their trust, the next major milestone in the intake process for most firms is scheduling an initial consultation.

The consultation is effectively a "sales meeting" because you get the opportunity to learn more about the legal matter at hand, and if he or she is a good client fit, you'll hopefully land their business. Given the importance of consultations, it's worth spending the time to develop a good process for setting these appointments and ensuring that people actually show up.

Best practices for initial consultations

1. Screen clients beforehand with a brief questionnaire

Most consumer-facing law firms deal with a lot of "tire-kickers" who may inquire about legal services despite having no real claim or legal issue, or no budget to afford the services.

In order to avoid wasting a solicitor's valuable time meeting, you should do your best to screen out these people early in the process.

One technique is to use a brief (i.e., 10-15 questions max) intake questionnaire. You can gather some basic data such as their contact info, the names of opposing parties, their current employment status and income, and some details about their legal matter.

Collecting this information upfront enables admin staff at the firm to perform a conflict check, review the merits of the person's matter, and ensure that they can afford the services before deciding whether or not to bring them in for a consultation with a solicitor.

Ideally, you should use an online intake form tool to make this process easy for your prospective client. For example, Clio Grow offers online intake forms that are mobile-responsive, so that clients can fill them out anywhere, even on a mobile device.

2. Always send a confirmation email and a reminder

There's nothing worse than a no-show. This doesn't just waste your time—it also means that you will be unlikely to land your new client.

In order to reduce the possibility of someone forgetting to show up for their initial consultation, send out a confirmation email as soon as a consultation is booked.

The confirmation email should confirm the date and time of the appointment. You can also include helpful information such as your office address, instructions for where to park, or dial-in information for a phone consultation.

You might also consider using the confirmation email to "warm up" the potential client a bit and continue building their trust.

A good strategy is to include links to relevant educational articles from your website, positive testimonials from past clients, video introductions of the solicitors, or other resources to engage the prospect and establish your firm's credibility.

Finally, you should plan to remind every prospect about their upcoming appointment either the day before or a few hours before each appointment occurs.

You can assign this task to a receptionist or office administrator and have them call each person to confirm that they still plan to show up, or you can use an automated appointment reminder system such as Clio Grow's appointment scheduling tool.

Stage 3: Collecting information

Gathering information is the core of the client intake process.

The information collection process usually begins right when a new lead comes in, and it continues in a variety of ways before, during, and after the consultation.

Because this step is so fundamentally important to providing legal services, the process for collecting information is certainly something that should be optimised for organisation and efficiency.

Best practices for collecting information

1. Use standardised questionnaires to ensure accuracy and consistency

Having incomplete or inaccurate data can cause serious problems, including exposure to malpractice claims.

Standardising your data collection practices and using questionnaires specific to each type of case or matter makes it easier for staff members to collect the information needed, and the process will be far less prone to errors.

Each questionnaire should include all the important details about both the client and their legal matter. This should include all contact information, birth dates, key dates and deadlines related to the legal matter, as well as opposing party names and contact info, and any other specific information necessary to provide services.

2. Capture important data in a database by using custom fields

Saving your client intake information on paper questionnaires or in Word documents won't do you much good, because the data won't be in a structured format.

Sure, you can manually re-enter the data into a case management database later, but this takes considerable time and effort.

By using automation to capture data into custom fields, you can collect your data in a structured format while also completely eliminating the manual data entry process.

For example, by using Clio Grow's online questionnaires and connecting them to your Clio custom fields, you can collect the data you need and record it directly into your matter management database.

Unlike data that is saved in a scanned document or a Word file, data in a structured database is easily searchable. You can also use it to automatically draft documents, generate bills, or even send it into other software programs through API integration.

Stage 4: Drafting & signing the fee agreement

1. Use automation to streamline drafting and reduce errors

Law firms will pretty much always use standardised templates for their fee agreements. But for each new client you take on, you will have to replace the names, contact info, fee amounts, and other details related to the specific client and matter throughout the template.

This process can be tedious and also prone to errors, as staff members tend to move hastily through these legal documents.

Nothing is more unprofessional than sending a fee agreement out with the name of a past client in it, so these errors can be costly in terms of your professionalism and reputation.

Client intake software offers easy-to-use document automation tools which can replace all the information in your fee agreement templates with relevant info for a specific client automatically.

This helps cut down on non-billable admin hours, and most importantly helps prevent embarrassing mistakes that can occur during the drafting process.

2. Use e-signatures to eliminate paperwork & create a seamless process for clients

Today, more and more people tend to use their mobile phones to do everything from ordering a takeaway to ordering a taxi, to pay their taxes. Asking them to download your fee agreement, print it, sign it by hand, scan it, and email it back puts quite a burden on them.

With e-signature software, you can streamline the process of getting fee agreements signed by clients. Clients can simply click a link on their mobile phone or computer, draw or type in their signature, and click a button to submit the signed copy back to the firm.

The entire process takes a matter of seconds, compared to printing and scanning which could take hours or days, depending on whether your client has easy access to a printer and scanner.

Since signing the fee agreement is such an important step in the intake process, it's critical to make it as easy as possible for your clients in order to ensure you get hired. Plus, you can save a significant amount of money on printing costs by going paperless.

Check out Clio Grow's document automation and e-signature capabilities to see how this process works with Clio.

3. Open a matter to track upcoming tasks and deadlines

Once the fee agreement has been signed, the sales cycle concludes, and your processes shift from lead management to case management. The biggest thing to take into consideration at this point would be any key events or deadlines which might be coming up for the client's case.

Failing to calendar these events can expose your firm to serious liability. At this time, it's a good idea to open a matter in your case management software, schedule any deadlines or events on your calendar, and assign important tasks to members of your staff.

Clio Grow makes it simple to transition from managing a lead to managing a case. It's easy to convert a "lead" into a "client" within Clio Grow, and all the data you captured during the intake process can be exported to open a matter in Clio that's ready for

billing. This ensures consistency in your data and also eliminates the burden of duplicate data entry.

Summary

Intake is a key part of the client lifecycle, and creating an organised and repeatable process is essential to your firm's sustained growth.

Clearly defining key stages of the intake process at your firm makes it easier to identify bottlenecks and inefficiencies, so that you can improve the process.

At most firms, the stages of the client intake process would be similar to the following:

- Lead acquisition and nurturing
- Scheduling and conducting consultations
- Collecting and storing information
- Drafting and signing a fee agreement

Think about each stage carefully and focus on creating a streamlined process which saves time for your staff, and that also improves the experience for clients. Not only will this make your firm more efficient, it will help maximise your conversions and drive more sales and revenue.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.