

CLE-ELIGIBLE WEBINAR

Top Strategies for Improving Your Firm's Client Intake



Agenda

[60 minutes – CLE Portion]

- Housekeeping + CLE/CPD info
- Meet the panel
- Understanding the marketing funnel
- Optimizing the marketing funnel
- Advertising ethics rules
- Finding and fixing intake inefficiencies
- Final resources and polls
- Q&A

[20 minutes – optional demo of Clio's Client Intake tool]



Housekeeping

- Session length: 60 minutes CLE + 20 minute walkthrough of Clio Grow
- Recording & slides emailed tomorrow (*CLE is only available for the live session)

Audio Settings ^



Chat





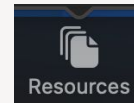
Raise Hand



Q&A

Leave

- Use  to engage with fellow webinar attendees and **select "Everyone"**
- Use  to ask questions directly to panelists
- **New:** resources button to download materials from today's session!
- Please fill out the **survey** at the end of the session



CLE / CPD Information

To qualify for credit, you must:

1. Be logged in on your own device under the email/name you registered with (cannot share logins).
2. Attend the entire live CLE webinar – **60 minutes**
3. Participate in the polls during the live session.

*If you have met the participation requirements, you will receive a personalized CLE/CPD affidavit from **mcle-clio@americanbar.org** for the webinar you attended to completion. Please check your spam or junk folders as these emails often end up there. Please note you have to fill out an affidavit for each individual webinar. Once you complete the affidavit, you will be able to download your certificate(s) of attendance and they will be emailed to you as well from **mcle-clio@americanbar.org**.

TODAY'S PANEL



Liz Hudson

Customer Marketing Manager, Clio



Ryan Dahlen

VP of Marketing, Uptime Legal
ryan.dahlen@uptimelegal.com



Mechelle Woznicki

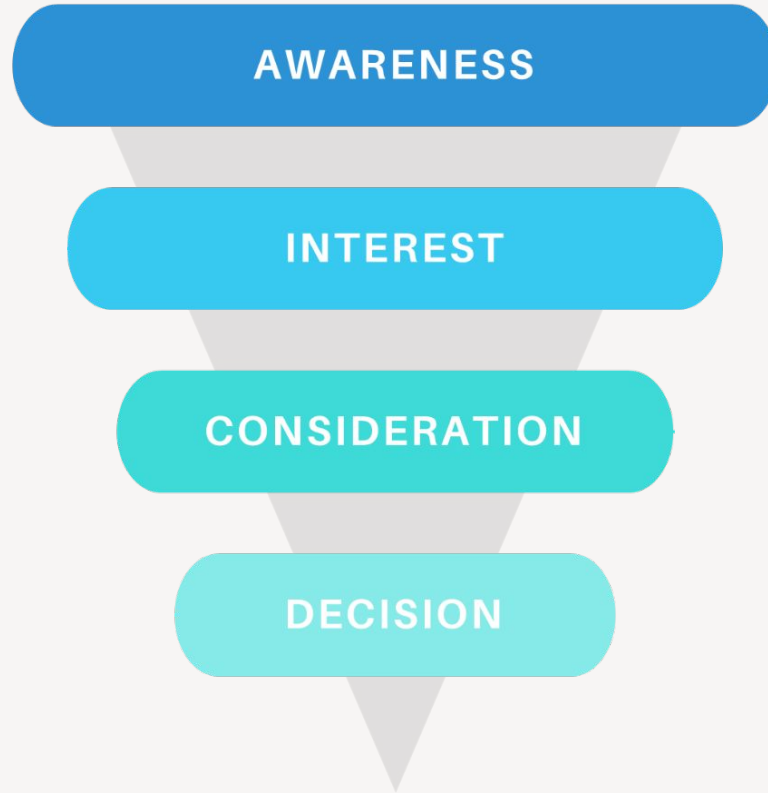
Attorney at Woznicki Law, PLC
mechelle@wellbalancedlegal.com

69% of firms find it harder to generate new leads than 5 years ago. Meanwhile 65% are often too busy to handle new clients.

Source: Moneypenny survey 2021



The Marketing Funnel



Digital Marketing

- **Top of the Funnel**

- **Awareness:** Potential clients become aware of you via web search, social media, advertising or referrals

- **Middle of the Funnel**

- **Interest:** Potential clients seek more information about your services, expertise and reputation
- **Consideration:** You are an option for the potential client; they will compare you to other firms

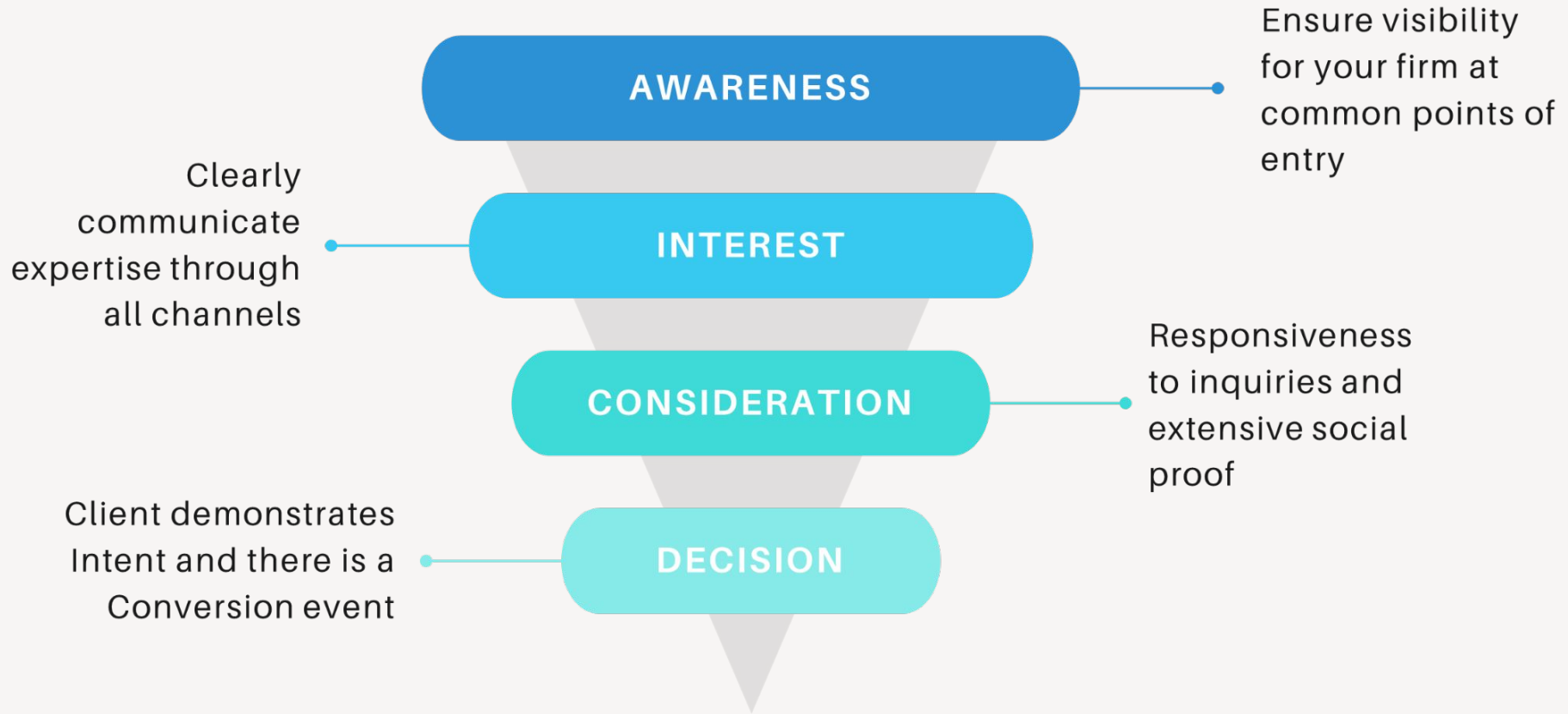
- **Bottom of the Funnel**

- **Decision:** The potential client has demonstrated **Intent** (this includes your phone) to hire you, and their ultimate decision to sign up is a **Conversion**

- **Loyalty/Advocacy:** After resolving the client's legal issue, providing social proof of their positive result will improve your marketing



The Marketing Funnel: Optimization



#1 Generate the Right Leads: Top/Middle Funnel

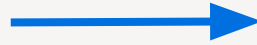
What are “the *right* leads”?

The basics:

- Potential Clients
- Looking for the services you provide
- In the jurisdiction(s) where you are licensed

Other qualification criteria:

- Conflict check
- Complexity and viability of the legal matter
- Ability to pay for services
- Client expectations





Is your firm using Google Local Services Ads?

- a. Yes, love them
- b. Yes, but I need help
- c. No, but I'd like to
- d. No, what's that?



Invest Locally

- If you run ads, investigate Google Local Services Ads, which require verification.
- Claim and optimize your Google Business Profile if you haven't already (business.google.com)
- Ensure that you have consistent name, address and phone number data on your website and any other directories or social media where that information is available.
- Ask for (positive) reviews from satisfied clients, respond to negative reviews.

The screenshot shows a Google search for "dui lawyer lansing". The search results are categorized into "Sponsored - DUI Lawyers | Lansing" and "Businesses".

Sponsored - DUI Lawyers | Lansing

- Zeineh Law**: 4.9 stars (58 reviews), 16 years in business, Serves Lansing, Open until 5 PM, (517) 398-8761. Provides: DUI/DWI. Includes Message and Call buttons.
- O'Keefe Law PLLC**: 5.0 stars (44 reviews), 11 years in business, Serves Lansing, Open 24/7, (517) 398-8746. Provides: DUI/DWI. Includes Call button.

Businesses

- DeBruin Law, PLLC**: 5.0 stars (240 reviews), Criminal justice attorney, 10+ years in business, 500 E Michigan St #130, (517) 324-... Open - Closes 6 PM. Includes Website and Directions buttons.
- Coontz Law**: 4.7 stars (107 reviews), Criminal justice attorney, 5+ years in business, 500 E Michigan Ave #130, (5... Open - Closes 12 AM. Onsite services - Online appointments. Includes Website and Directions buttons.
- Grabel & Associates**: 4.8 stars (127 reviews), Criminal justice attorney, 25+ years in business, 124 W Allegan St # 638, (51... Open 24 hours. Includes Website and Directions buttons.

Map: A map of Lansing, MI, showing the locations of several law firms: DeBruin Law, PLLC, Zeineh Law, Coontz Law, and Grabel & Associates. Other landmarks like Spartan Stadium and Michigan State University are also visible.

Grabel Law: <https://www.grabellaw.com> - lansing-dui-lawyer

Lansing DUI Lawyer – Lansing Drunk Driving Attorney
Experienced Lawyers in Lansing Defending Clients in DUI, OWI, DWI, OUIL, OWVI, and all other Drunk Driving Cases Throughout Ingham County. The experienced drunk ...
Experienced Lawyers In... · Win A Drunk Driving Case In... · Fight A DUI Charge In...

Optimizing Lead Generation Forms

FULL NAME *

PHONE NUMBER *

EMAIL ADDRESS *

DESCRIBE YOUR CASE *

SUBMIT MESSAGE

FULL NAME *

PHONE NUMBER *

EMAIL ADDRESS *

Case Type

BRIEFLY DESCRIBE YOUR CASE *

SUBMIT MESSAGE

Please include the full legal name of the person this inquiry or conflict is about. In accordance with the guidelines of the BC Law Society, we are required to conduct a conflict of interest verification.

First Name *

Last Name *

Other Parties First Name *

Other Parties Last Name *

Other Parties Other Names (i.e. previous married names, maiden names, nicknames, etc.)

Phone Number *

Email Address *

Briefly Describe Your Case *

SUBMIT MESSAGE

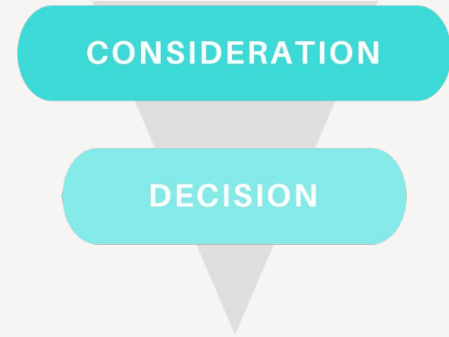
Optimizing Lead Gen Forms

Key points to remember:

1. Lead intake is not yet client intake
2. You need less information to qualify a lead
3. Connecting forms to an intake or customer relationship management tool will make life easier
4. The Grandparent Test: can they complete the form without (too much) friction?

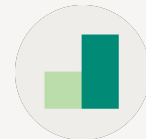
#2 Response Is Everything : Middle/Bottom Funnel

- The quicker you respond, the more likely you are to land the lead
 - 79% of legal consumers expect A response in 24 hours
 - 67% of clients hire the first lawyer they speak to and like
- You miss 100% of the shots (calls) you don't take (answer)
- **Automate actions and responses** for efficient, reliable documentation and follow-through



#3 Mine Your Data for Value—It's There!

- How did prospects get to your site/ad?
- What did they do when they arrived?
- Did they convert?
- If so, where?
- If not, what did they do?



Intake Insights

There was a decrease in leads last month, why?



Google Analytics shows a decrease in conversions for Organic Search



Google Search Console shows flat traffic and impressions, but...



Your Google Business Page shows a decrease in interactions that aligns with the lead slowdown. Local SEO was driving a lot of leads for your site! Allocate budget to local SEO to get back on track!

CLE Participation Poll

***Required for CLE Credit**

You must click “Yes” to verify your attendance during this program for CLE purposes



Advertising Ethics Rules

MRPC Rule 7.1: Communications Concerning a Lawyer's Services

A lawyer shall not make a **false or misleading communication** about the lawyer or the lawyer's services. A communication is false or misleading if it contains a material misrepresentation of fact or law, or omits a fact necessary to make the statement considered as a whole not materially misleading.

MRPC Rule 7.2: Advertising

(a) A lawyer may communicate information regarding the lawyer's services through any media.

(b) A lawyer shall not compensate, give or promise anything of value to a person for recommending the lawyer's services except that a lawyer may:

(1) **pay the reasonable costs of advertisements or communications** permitted by this Rule.

(2) pay the usual charges of a legal service plan or a not-for-profit or qualified lawyer referral service;

(3) pay for a law practice in accordance with Rule 1.17;

(4) refer clients to another lawyer or a nonlawyer professional pursuant to an agreement not otherwise prohibited under these Rules that provides for the other person to **refer clients or customers to the lawyer, if:**

(i) the reciprocal referral agreement is **not exclusive;** and

(ii) the client is **informed of the existence and nature** of the agreement; and

(5) give nominal gifts as an expression of appreciation that are neither intended nor reasonably expected to be a form of compensation for recommending a lawyer's services.

(c) A lawyer shall not state or imply that a lawyer is certified as a specialist in a particular field of law, unless:

(1) the lawyer has been certified as a specialist by an organization that has been approved by an appropriate authority of the state or the District of Columbia or a U.S. Territory or that has been accredited by the American Bar Association; and

(2) the name of the certifying organization is clearly identified in the communication

A Well Balanced Approach to Intake



**Where are the
inefficiencies?**

STEP 1

Interview stakeholders

Even if that means only you...

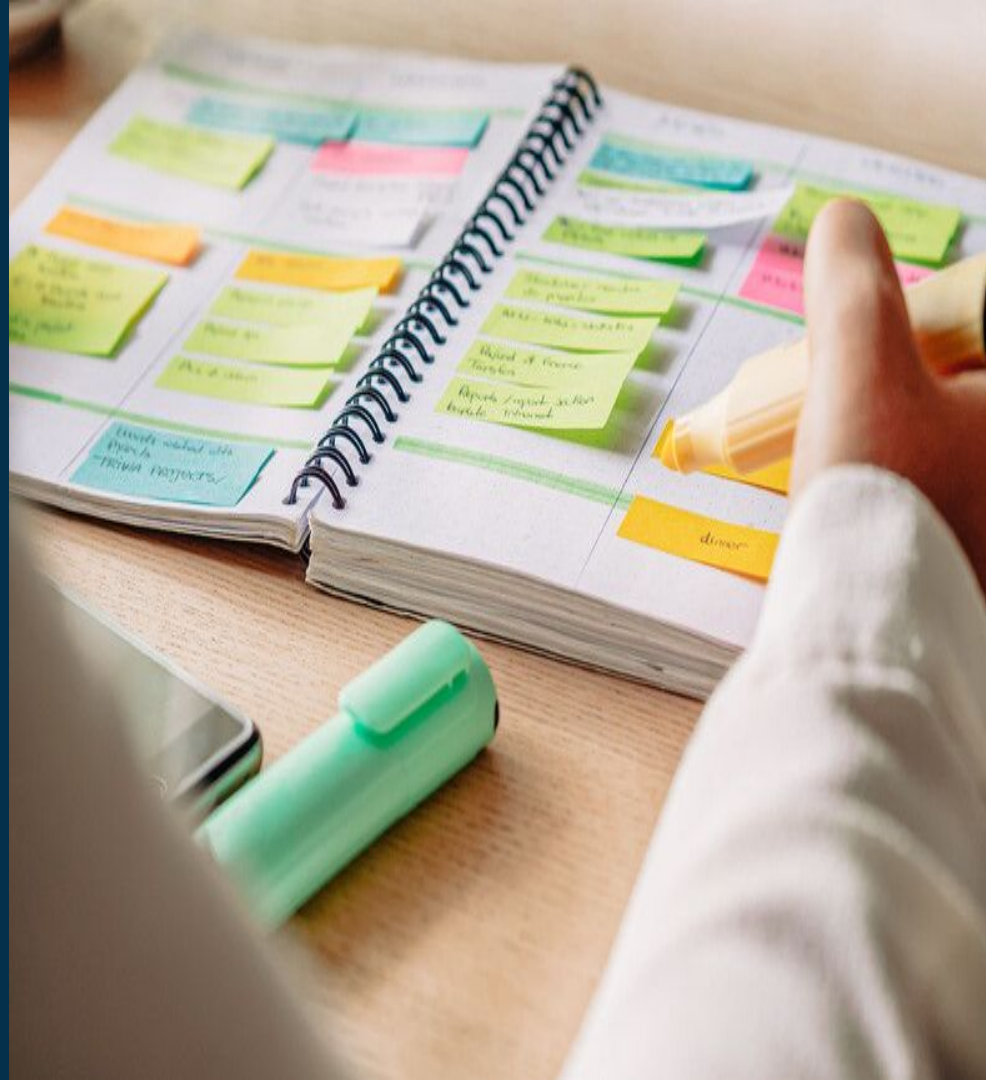


Consider the process from client's POV

- What are the pain points
- What are the bottlenecks
- Where does the lead give up

Document the steps of the process in any way you can:

- Write a narrative
- Create a list
- Draw a picture



Intake Examples

- Lead reaches out to firm via website
- Lawyer emails lead back
- Email correspondence re time for phone call
- Phone call
- Firm send engagement letter
- Lead prints and signs engagement letter
- Engagement letter emailed to firm

INTAKE GOALS



ORGANIZE



↓ ADMIN



↑ PROFIT

Example: How does a potential new client reach the firm?

- By Phone
 - Direct Call
 - Routed to CRM from Call Center (Smith.ai, etc.)
- By Email
 - Direct to a person at the firm
 - To an info@xxxx.com
- Website – Contact Us





Contact – Phone

What happens if they call in directly?

- Basic intake is done to see if we can take the case.
- Call with intake specialist is scheduled.
- Quick intake call with attorney is done.



Contact – Call Center

What happens if they call in via a call center?

- Call center schedules call with intake specialist.
- Call center adds to CRM.
- Call center schedules consultation.
- Automated drip campaign if no appointment is scheduled.



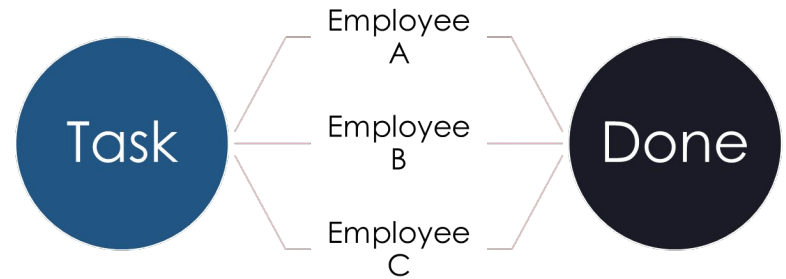
Contact – Email or Website

What happens if they email or enter via website (contact us)?

- Team adds to CRM and contacts back.
- Team schedules call with intake specialist.
- Team schedules paid (or free) consultation with attorney.

Identify Inconsistent Processes

- Each Employee may do things differently
- Identify the best part of each method



Find Best Practices

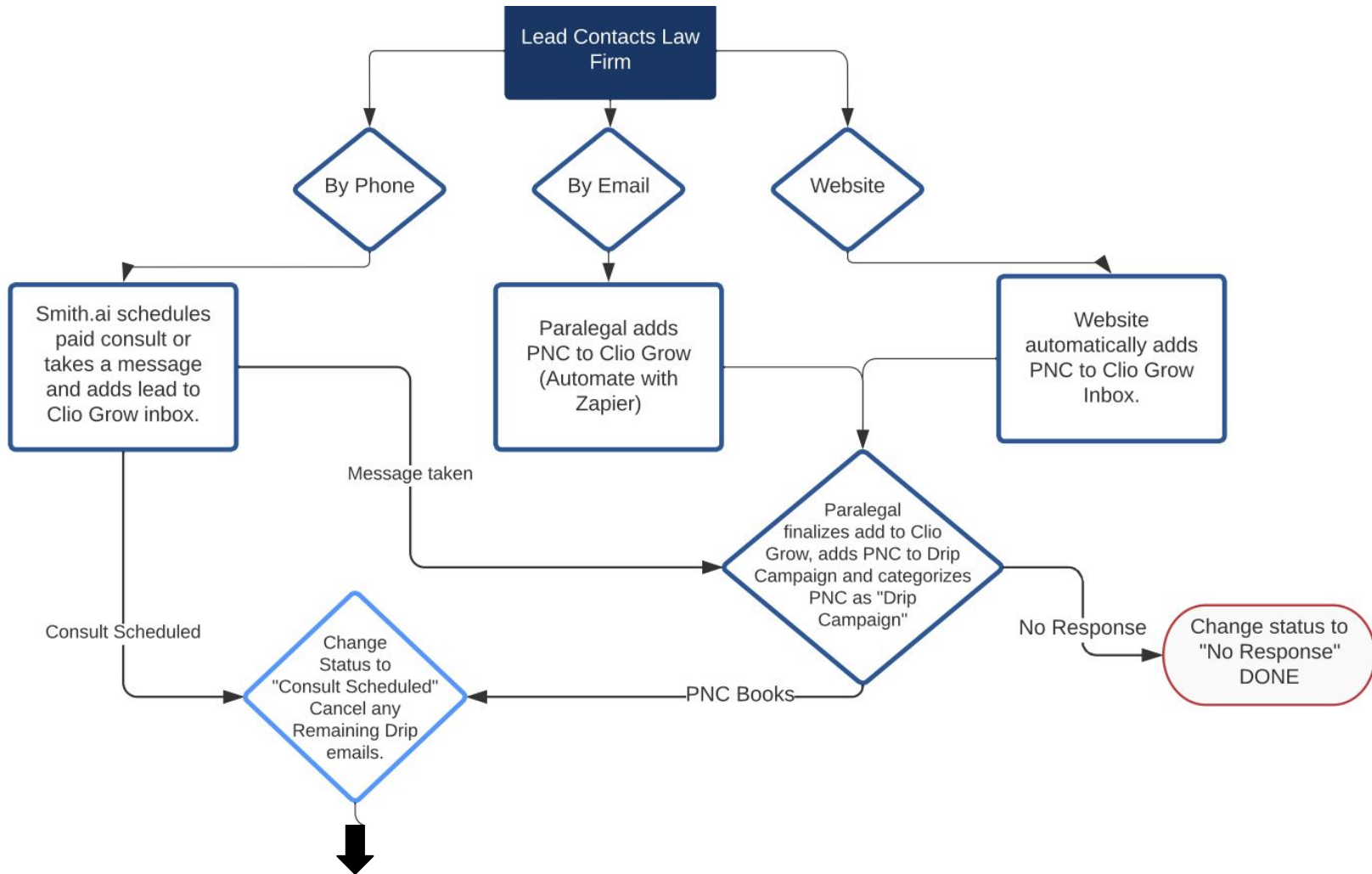
- Make team members feel appreciated

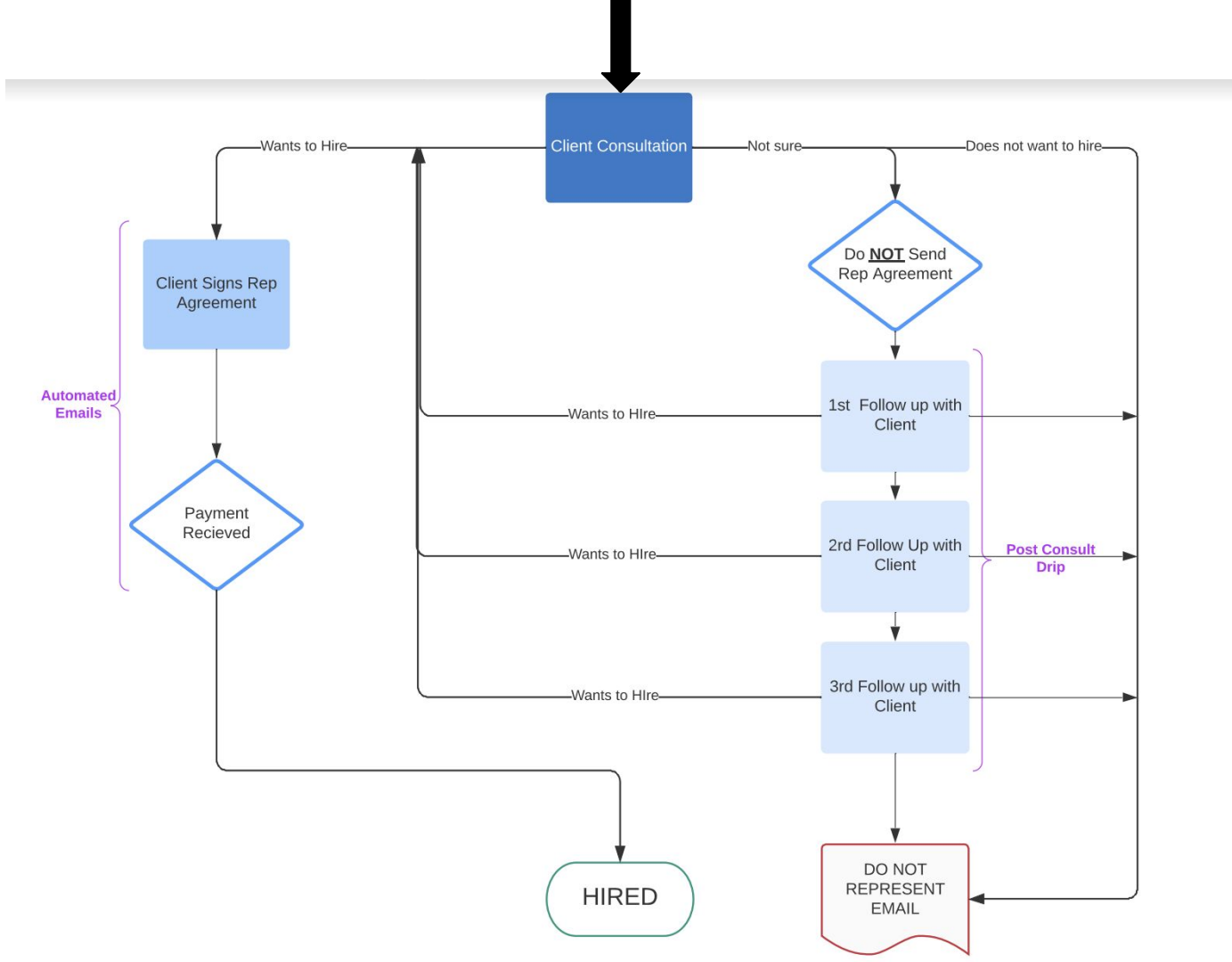


STEP 2

Chart it

MS Visio, Lucidchart, Creately, Smartdraw





STEP 3

Automate It

In your CRM (Clio Grow)

- Consider APPs like Zapier, Integrately, Make, MS Flow, etc.

A person is seen from behind, sitting on a patterned chair and using a laptop. The laptop screen displays a CRM software interface with a sales pipeline. The pipeline is divided into four stages: 'Newly Added', 'Consult Scheduled', 'Pending Engagement', and 'Follow up Next 6'. Each stage contains several lead cards with names, dates, and status indicators. The background is a blurred indoor setting with a green plant on the left.

Add the new process into your CRM software as a workflow

Workflow Templates

Intake Checklist Edit Delete

Task Add call notes into Clio Grow *Assigned To: Kacie Fraaza Due: 5 Minute(s) after creation | Remind: before due date*

Task Schedule Consult *Assigned To: Kacie Fraaza Due: 1 Day(s) after creation | Remind: before due date*

Email Pre-Consultation

Appointment 60 minute Paid Consultation

Task Upload notes from Consultation into Clio Grow *Assigned To: Kacie Fraaza Due: 1 Week(s) after creation | Remind: before due date*

Email Payment Request

Document Consulting Agreement - Clio Buildout

Task Change Status of lead to "Paid Pending Intake" *Assigned To: Kacie Fraaza Due: 1 Week(s) after creation | Remind: before due date*

Task Add parties names into Grow *Assigned To: Kacie Fraaza Due: 1 Week(s) after creation | Remind: before due date*

Form General Intake Form

Task Convert Lead to Clio Manage *Assigned To: Kacie Fraaza Due: 1 Week(s) after creation | Remind: before due date*

Task Change Status of Lead to "Hired" *Assigned To: Kacie Fraaza Due: 1 Week(s) after creation | Remind: before due date*

Add Checklist Items

[+ Add Appointment](#)

[+ Add Task](#)

[+ Add Form](#)

[+ Add Document](#)

[+ Add Email](#)

[Create Checklist Template](#)



- Pipeline
- Agenda
- Contacts
- Matters**
- Forms
- Documents
- Reports

Unassigned (Chelle's Cookie Company) + Add label

Matter Details

Unassigned (Chelle's Cookie Company) ✎

Status Newly Added

Assigned to MW

Created on January 13, 2023

Created by Mechelle Woznicki

Description N/A

Location N/A

Value N/A

[+ Add a custom field](#)

Contacts

C **Chelle's Cookie Company** (PRIMARY) ✎

Type Lead

Source Unassigned

Created on January 13, 2023

Referred by [+ Add a referral relationship](#)

Tags [- Add Tags](#)

✉ Not Available

☎ Not Available

📍 123 First Street
Portage, MI 49024

Company contacts

[Chelle Sample](#)

✉ home mechelle@woznickilaw.com

[+ Add a company contact](#)

- Workflow**
- Notes
- Emails
- Files

0/12 Con

Add to workflow

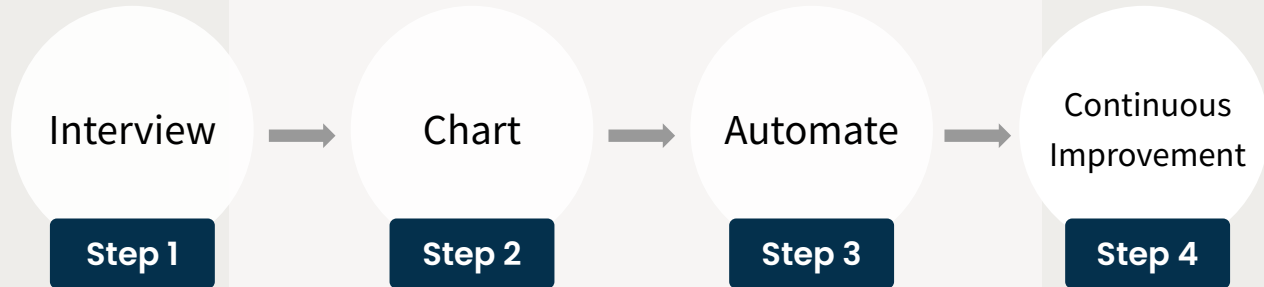
or

Intake Checklist

- Task - Add call notes into Clio Grow
Kacie Fraaza • April 13, 2023 at 1:28 pm (EDT) • No Reminder Set
- Task - Schedule Consult
Kacie Fraaza • April 14, 2023 at 1:23 pm (EDT) • No Reminder Set
- Email - Pre-Consultation
No Contact • Not Scheduled
- Appointment - 60 minute Paid Consultation
No Contact • Not scheduled • No reminders
- Task - Upload notes from Consultation into Clio Grow
Kacie Fraaza • April 20, 2023 at 1:23 pm (EDT) • No Reminder Set
- Email - Payment Request
No Contact • Not Scheduled
- Document - Consulting Agreement - Clio Buildout
No Signers • No Due Date
- Task - Change Status of lead to "Paid Pending Intake"
Kacie Fraaza • April 20, 2023 at 1:23 pm (EDT) • No Reminder Set
- Task - Add parties names into Grow
Kacie Fraaza • April 20, 2023 at 1:23 pm (EDT) • No Reminder Set
- Form - General Intake Form
No Contact • No Due Date
- Task - Convert Lead to Clio Manage
Kacie Fraaza • April 20, 2023 at 1:23 pm (EDT) • No Reminder Set
- Task - Change Status of Lead to "Hired"
Kacie Fraaza • April 20, 2023 at 1:23 pm (EDT) • No Reminder Set

- Settings
- MW

Conclusion



Clio Resources & Polls



Clio's Offerings



Clio Manage

Legal practice management software

Our most popular product—the industry's leading solution to help manage clients, organize cases, and automate tedious tasks like getting paid and month-end billing.



Clio Grow

Client intake and legal CRM software

Standardize the client intake process with online intake forms, email automation, and e-signatures to build strong relationships, and get powerful data insights to grow your firm.

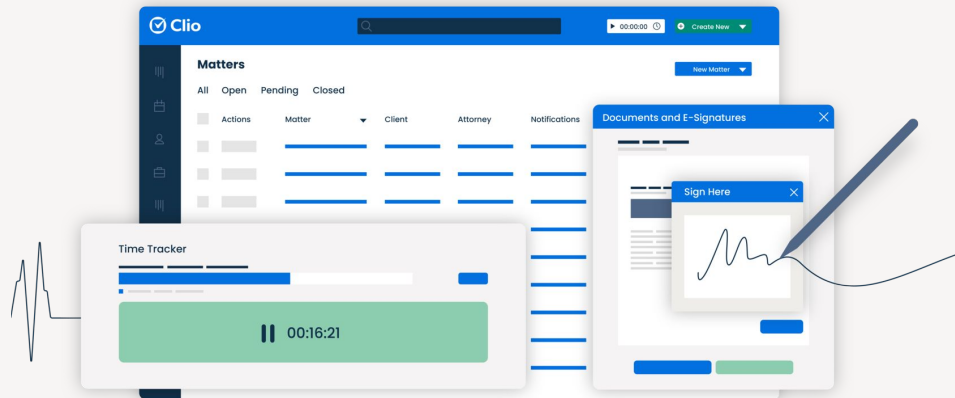


LAWYAW
powered by Clio

Clio Draft

Advanced document automation

New software for solo, small- and mid-sized legal practices that streamline information gathering and document assembly with programmable templates, built-in e-sign and other features.



Clio Polls:

Poll 1: For Non-Clio Users

Would you like to learn more about:

- a. Clio's offerings
- b. No, I'm not interested *or* already use Clio

Poll 2: For Clio users

Would you like to learn more about:

- a. Adding Clio Grow for client intake
- b. Adding Clio Payments
- c. Adding Clio Draft
- d. No, I'm not interested *or* already use Grow/Payments/Lawyaw



Get in touch with our consultants:

Would you like to learn more about (select all that apply):

- a. JurisPage (Ryan)
- b. Well Balanced Legal (Mechelle)
- c. Not at this time



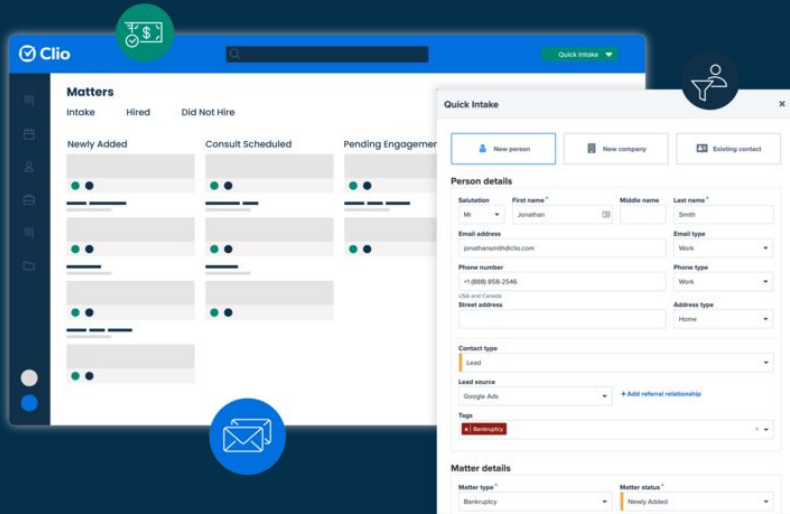
Other helpful resources

- **Guide:** [*Client Intake: A Guide for Law Firms*](#)
- **[March 19] Virtual summit:** [*Personal Injury Law Firm Virtual Summit*](#)
- **[April 9] Clio customer webinar:** [*Discover What's New in Clio*](#)
- **[April 16] CLE-eligible webinar:** [*Organizational Strategies to Maximize Success at Court*](#)
- **[October 7-8] Clio Cloud Conference:** [*Get your pass today!*](#)



Part 2:

Optional Clio Grow Demo



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Poll 2: For Clio users

Would you like to learn more about:

- a. Adding Clio Grow for client intake
- b. No, I'm not interested *or* already use Grow

