

WHAT IS A CRM

AND WHY SHOULD EVERY

LAW FIRM USE ONE?

If your law firm is looking to streamline workflows, bring in more clients, and keep clients happy, you may have seen the term "CRM" tossed around as a possible solution.

But what exactly is a CRM, and how can a CRM software help your practice grow and build relationships with clients?



Law Ruler

CRM:

a quick definition

The term CRM is an acronym that stands for customer relationship management —and as you might guess from the name, CRM refers to a range of software solutions that help you build and manage your relationships with your clients.

Although CRM software is relatively new (think a few decades old), it's designed to help you do many of the same things attorneys have always done: help clients, bring new leads to your firm, and build strong ongoing relationships with the people you serve.

The difference is that CRM software allows your law firm to do all of these things more efficiently and effectively than ever before. By leveraging data analysis and software automation tools, a [CRM for law firms](#) can help you:

- Reach more leads
- Optimize new client intake
- Foster better communication with clients
- Streamline your workflows
- Grow your firm in less time

The end result? More satisfied clients and a healthier, more profitable practice.



How a CRM can help grow your firm

CRMs are flexible, powerful platforms, but you don't want a software that's just another tool your law firm only halfway uses. You want one that will actually help your firm grow.

When implemented correctly, a legal CRM software allows your firm to bring in (and sign) more clients with optimized client intake and marketing automation, boost team collaboration and efficiency, and build better client relationships from the start.

Optimizing client intake

The first step to growing your firm? Getting qualified leads to walk through the front door—whether digitally or literally—and sign with your practice.

That isn't always as easy as it seems, though. Attorneys are already busy trying to fit in billable hours. The time to follow up immediately with new leads isn't always there.



The extensive automation tools included in a CRM let you send automated, personalized follow-ups almost instantly, so your leads always receive a response—before they choose to move on with another firm.

A CRM also allows you to more easily figure out if your leads are qualified.

Using a CRM, you can create scripts and automated forms that will automatically qualify or disqualify potential leads, empowering the less experienced members of your intake staff to quickly and efficiently handle new prospects.

And when qualified leads do walk through the door? A CRM makes it easier to track where each of your leads is in the client intake process, so you can ensure you're giving them the attention they need to sign with you.

Marketing automation

The automation tools included in a CRM can also help you market your firm more effectively.

Auto [email drip campaigns](#) and automated [text message marketing](#) can help you stay top of mind with

clients and leads by increasing the number of “touches” you have with them—and they allow you to market your services without taking too much time away from billable hours.

With legal CRM software at your disposal, you can even segment your audiences based on where they are in your pipeline, what their legal needs or interests are, and more. For example, you can send one batch of emails to qualified leads, another to current clients, and a third to previous clients who you haven't heard from recently, all in only a few easy clicks.



Increased transparency and accountability

By automatically tracking and storing data on client and lead interactions, a CRM creates a clear record of each individual's entire history with your practice. Using a CRM, you can easily check information like:

- Who reached out to each lead and when
- How (and how quickly) client communications were responded to
- What messages have been sent at each stage in resolving a matter

These thorough records can help to facilitate a culture of transparency and accountability at your firm, and they also make it easier for multiple team members to actively collaborate on a matter. For example, if your firm has lost a lead or client, the records provided by a CRM allow you to conduct an analysis of what went wrong and improve your practices for the future.

Better relationships with your leads and clients

Quicker follow-ups with prospects and clients. More consistent communication throughout the process of resolving a matter. Regular messaging through automated email drip campaigns.

All of these CRM benefits share one thing in common: they help you build relationships with the people you want as your clients. And at the end of the day, that's what a CRM is for.



By fostering consistent engagement with new prospects, current clients, and people you've served in the past, law firm CRM software helps you grow your practice and keep your clients coming back for more.

You can even use the marketing automation tools included in a CRM to solicit more positive reviews from clients who are happy with your services—and the consistent messaging a CRM helps you achieve keeps you top of mind with past clients, resulting in more opportunities for referrals.

The bottom line

CRM software helps your practice grow while freeing up time for attorneys and intake staff.

That being said, not all CRM systems will be equally useful for your firm, and you'll want to look for software that's optimized for law firms specifically.

At [Law Ruler](#), we offer CRM solutions fine-tuned to the needs of practicing attorneys. With a range of legal CRM, marketing automation, client intake, and analytics tools at your disposal, you'll be able to streamline your workflows while boosting engagement with clients and bringing in leads.

We're also deeply committed to client success—every firm using Law Ruler is offered comprehensive training to help you understand its capabilities, interface, and CRM best practices.

To see it in action yourself, [schedule a demo](#) today.