Why Your Social Security Disability Firm Needs a Legal CRM

Law Ruler

If your Social Security disability firm is looking to grow, you'll need:

- Targeted marketing outreach

- Consistent communication with a high volume of potential and current clients

- A streamlined, efficient intake and screening process

But without the right software support in place, all of these endeavors can overwhelm your intake staff or eat into your attorneys' billable hours.

A **law firm CRM software** can help you find, sign, and build relationships with more clients in less time—all while streamlining and optimizing your marketing and intake workflows.

Grow your Social Security disability practice

Social Security disability firms have their own unique workflows, as well as their own set of challenges—especially when they're looking to scale for new growth. Firms that handle SSDI cases need the ability to:

- Efficiently handle a high intake volume and carefully screen a high volume of potential leads
- Coordinate with clients to prepare for hearings and meet "request for hearing" deadlines
- Quickly and efficiently develop medical evidence

All of this is easier with the right software tools at your fingertips.

A LEGAL-SPECIFIC CRM CAN HELP

A **robust legal CRM** can help you automate key parts of your intake process, lose fewer leads from your intake funnel, and build stronger relationships with clients.

Among other benefits, the right software tools can help your firm:

- Streamline intake
- Qualify leads
- Gather documentation
- Stay in touch
- Identify growth areas

Most importantly, you'll be able to help your clients **access the benefits they deserve more efficiently**.

Reduce administrative burden with a streamlined intake process

If your Social Security disability firm is looking to grow, you'll need:

Unwieldy, inefficient intake processes can seriously impact your firm's ability to grow—and can be particularly harmful for SSD firms, who need to handle and effectively screen a high volume of potential clients.

Most law firms suffer from:

- Too little time to efficiently onboard clients
- Long response times that lead to clients moving on with another practice
- Insufficient lead tracking and intake reporting capabilities
- Siloed intake processes and client matter management tools

WHY THIS MATTERS FOR YOUR LAW FIRM

The ultimate effect of these common intake issues?

Higher intake funnel loss, greater administrative hassle, and fewer opportunities for growth.

You also risk making a bad first impression on the people who matter most to your firm: your clients. Ideally, the intake process should be as streamlined and painless as possible for your new leads.

HOW A LEGAL CRM IMPROVES YOUR INTAKE PROCESS

A legal CRM can streamline intake workflows with automated data entry and client intake tracking tools.

Logic-based, mobile-friendly intake forms also make your intake process easier for leads and decrease the chances of losing leads from your intake funnel.

The right CRM will even integrate with your practice management software, so you can transition seamlessly between intake for a new client and handling their case.

Focus on the right clients with qualified leads

Not every lead will be qualified to file an SSDI claim.

A legal CRM allows your firm to **quickly and efficiently qualify new leads,** even when less experienced team members are handling intake.

WHY THIS MATTERS FOR YOUR LAW FIRM

Law firms are built on billable hours, and the more time spent on non-billable processes, the less time spent on more profitable tasks.

This is why your firm needs systems in place that promote the highest level of productivity in the completion of administrative tasks, which includes legal marketing, CRM, and client intake.

Social Security disability firms also need a consistent way to quickly handle high intake volumes—without wasting too much time on leads who turn out to be unqualified. At the same time, lengthy screening processes can delay client intake and make your leads more likely to move on with another firm.

HOW A LEGAL CRM CAN HELP YOU QUALIFY LEADS

The **intelligent, logic-based intake forms** included in a good CRM can automatically qualify prospective clients based on their responses to intake questions—saving you time and allowing team members with less experience to effectively handle intake.

These forms can even be customized to fit your specific criteria for the cases your firm wants to take.

Gather documentation (painlessly)

From helping clients file their initial applications to developing medical evidence, Social Security disability firms handle a lot of documents.

Both applications and appeals processes can quickly fall apart without the necessary documentation, but many firms still rely on tedious, outdated methods for generating, sending, and gathering documents.

WHY THIS MATTERS FOR YOUR LAW FIRM

Manual document preparation isn't just a pain. It's also a major time-sink that cuts into your attorneys' efficiency.

To make matters worse, traditional methods for sending, receiving, and collecting signatures on important documents can slow down the intake process and make it harder to collect key documents in time for appeals hearings.

HOW A LEGAL CRM CAN HELP YOU GATHER DOCUMENTS

Document automation tools make it easier to quickly generate, populate, send, and manage legal documents—with less chance of errors from double data entry.

Law Ruler's legal CRM software even offers textable, **one-click e-signatures** and allows you to send and receive documents from within the software itself.

That means less time wasted tracking down important signatures, faster document preparation, and more efficient development of critical medical evidence.

Stay in touch with clients and leads (and build better relationships)

When it comes to growing your firm, timely communication is irreplaceable.

Your law firm is [100 times more likely to connect with a lead](#) in the first five minutes after they reach out, but less than [10% of prospective clients](#) report hearing back from firms within 15 minutes.

That gives firms that do offer fast, consistent follow-ups a huge advantage over their competitors.

WHY THIS MATTERS FOR YOUR LAW FIRM

Faster follow-ups = more leads who enter—and stay—in your intake funnel. And that means more growth (and more revenue) for your firm.

But timely communication with current clients is also just as important. A successful SSDI appeal relies on close coordination with the client, and your firm needs a way to keep channels of communication open and efficient throughout the process.

HOW A LEGAL CRM STREAMLINES COMMUNICATIONS

A legal CRM can **automatically send personalized follow-ups** within seconds of a lead first reaching out. You can also schedule automated reminders for your attorneys about key deadlines and tasks or send your clients automated scheduling reminders to reduce the possibility of no-shows.

Law Ruler's built-in softphone also allows you to automatically prioritize and make calls in one click without ever leaving the CRM—so you can make sure you're making the right calls at the right time to keep your leads and existing clients engaged.

Find more leads with marketing automation

An efficient and user-friendly intake process can only help your firm grow if you're also bringing enough new leads to your firm—and targeted marketing outreach is key to finding and nurturing those leads.

The **marketing automation** tools included in a legal CRM can help your firm find—and sign—more qualified leads in less time.

WHY THIS MATTERS FOR YOUR LAW FIRM

The more "touches" you have with your leads, the more likely they are to reach out to your firm—but traditional marketing approaches are time-intensive, and most attorneys already spend too much time on administrative tasks.

If you want to increase the number of leads you bring in without increasing the burden on your team, you need the right software support to automate your marketing campaigns.

HOW A LEGAL CRM HELPS YOUR FIRM MARKET MORE EFFECTIVELY

With the help of a law firm CRM's marketing automation tools, your firm can automate:

- Email drip campaigns
- Text message marketing campaigns
- Phone campaigns through pre-recorded voice calls
- And more

These tools can allow you more touches with leads than your team could ever hope to achieve otherwise, while also freeing up time through the power of automation.

The analytics tools included in your CRM can also help you focus your marketing efforts more effectively by helping you understand your marketing ROI and where your most qualified leads are coming from.
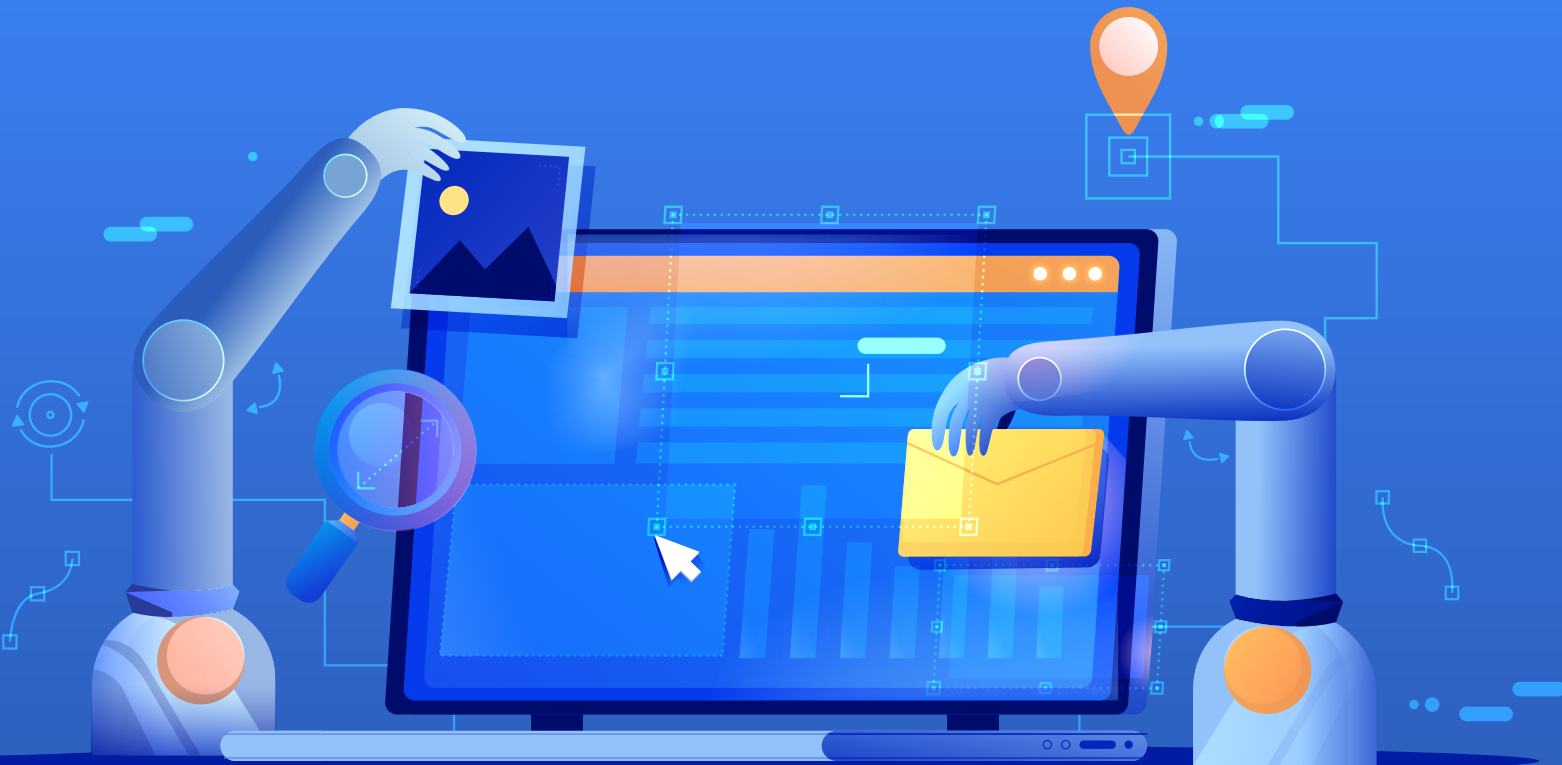
Sign more clients in less time with Law Ruler

Law Ruler's robust CRM is specifically designed to meet the needs of Social Security disability firms.

In addition to a wide range of intake automation tools, customizable reporting dashboards, and software integrations, Law Ruler offers:

- A unique built-in softphone
- Effortless, one-click e-signature
- A fully optimized cross-platform mobile app
- Best-in-class implementation support to help you get the most from our software

To see how we can help your firm streamline the intake process, get in touch today to **schedule a demo**.

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