What to Look for in a Law Firm CRM:

SEVEN KEY FEATURES

Law Ruler

If your law firm hasn't yet invested in a CRM (Client Relationship Management) software, there are plenty of reasons to get started now. The right legal CRM can transform the way your practice operates by:

- Strengthening your relationships with leads and existing clients
- Helping you find—and sign—more qualified leads
- Streamlining client intake processes
- Providing faster response times
- Automating tedious and time-consuming tasks

In short, a law firm CRM software helps you do the work of growing your firm in less time.

That doesn't mean that all CRMs will give your firm the same benefits, though. While there are plenty of CRM systems available on the market, not every CRM will provide the feature-rich support your practice needs to truly thrive.

Here are a few of the key features your law firm should look for as you consider different CRM software solutions.

1. A software built for law firms

Most CRMs on the market are industry-agnostic: they're generalized software platforms built to serve the needs of any business in any industry.

These software are powerful, but they're also jacks-of-all-trades and masters of none. While a generic CRM may benefit your firm, it won't be specifically designed for the unique demands and workflows of legal work.

For example, a legal-specific CRM will include robust client intake features that are designed to help you qualify leads more easily in less time and intake forms that are easily customizable to the needs of your practice area. A legal CRM will also integrate with other legal-specific software, such are your law firm's practice management system.

2. Automation tools

One of the greatest benefits of having a CRM is that it can automate key administrative tasks to help you:

- Save time (or spend your time better)
- Boost workflow efficiency
- Communicate with leads and clients more quickly and consistently

The legal CRM your firm chooses should feature customizable automation tools to help you handle intake, marketing, document management, and more.

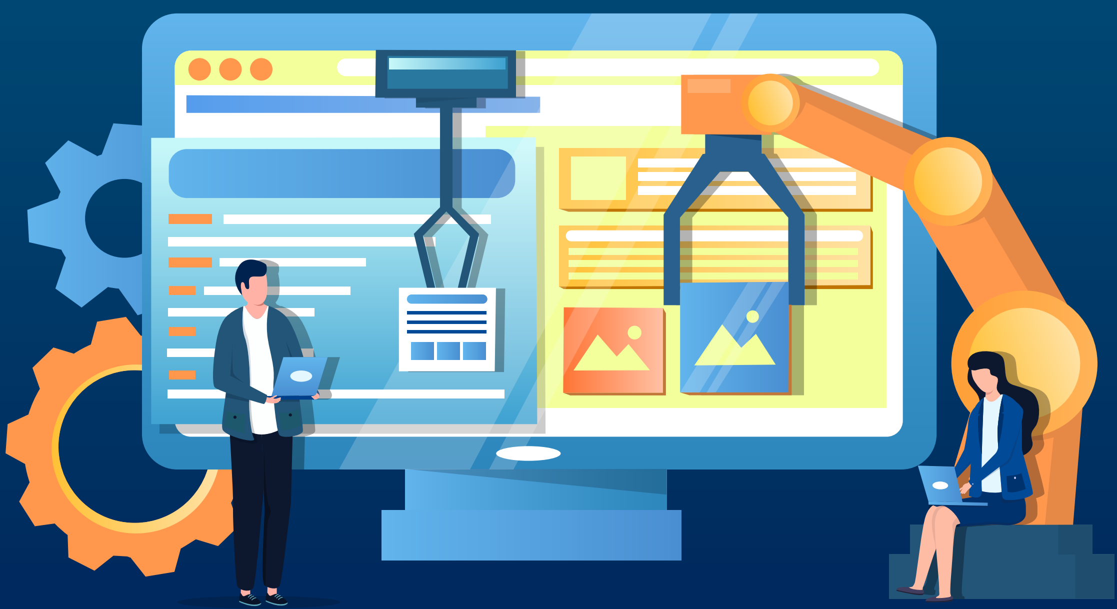
MARKETING AUTOMATION

Many leads need a number of follow-ups before they become receptive to hiring an attorney—but your firm is already busy enough without spending valuable time manually messaging them every few days.

The marketing automation tools included in a good law firm CRM can automate law firm marketing campaigns to increase touches with leads and keep them "hot" while also saving time for the rest of your team. With the right software tools at your disposal, all of the following marketing efforts can be automated:

- Email drip campaigns
- Text message marketing campaigns
- Voice calling campaigns using pre-recorded messages

The result is more qualified leads for your firm and a greater conversion rate for the leads you bring in.



CLIENT INTAKE AUTOMATION

The legal automation tools in the right CRM should also help you streamline your client intake process.

Leads are significantly more likely to sign with your firm if they hear back within the first few minutes, and the majority of leads will sign with the first practice that responds to them. At the same, your attorneys are busy with their billable hours, and it's all too easy for follow-ups with new leads to slip through the cracks in your busy schedule—or get put off until the next day.

A good legal CRM will allow you to send automated follow-ups almost instantly when a new lead reaches out. These follow-ups can be sent by email or text and even personalized with the lead's name and personal information, so your leads feel immediately cared for and are less likely to move on with another firm.

You can also automatically email or text client intake forms to leads who fill out your contact form online, and the information you collect on contact and intake forms can be automatically imported into your CRM's knowledge base and used to populate future documents.

DOCUMENT AUTOMATION

Once you've collected a new lead's information, your CRM should be able to quickly generate common documents from pre-existing templates and populate them using the information gathered from intake forms. The right CRM will also allow you to get important documents signed more quickly by emailing or even texting one-click e-signatures.

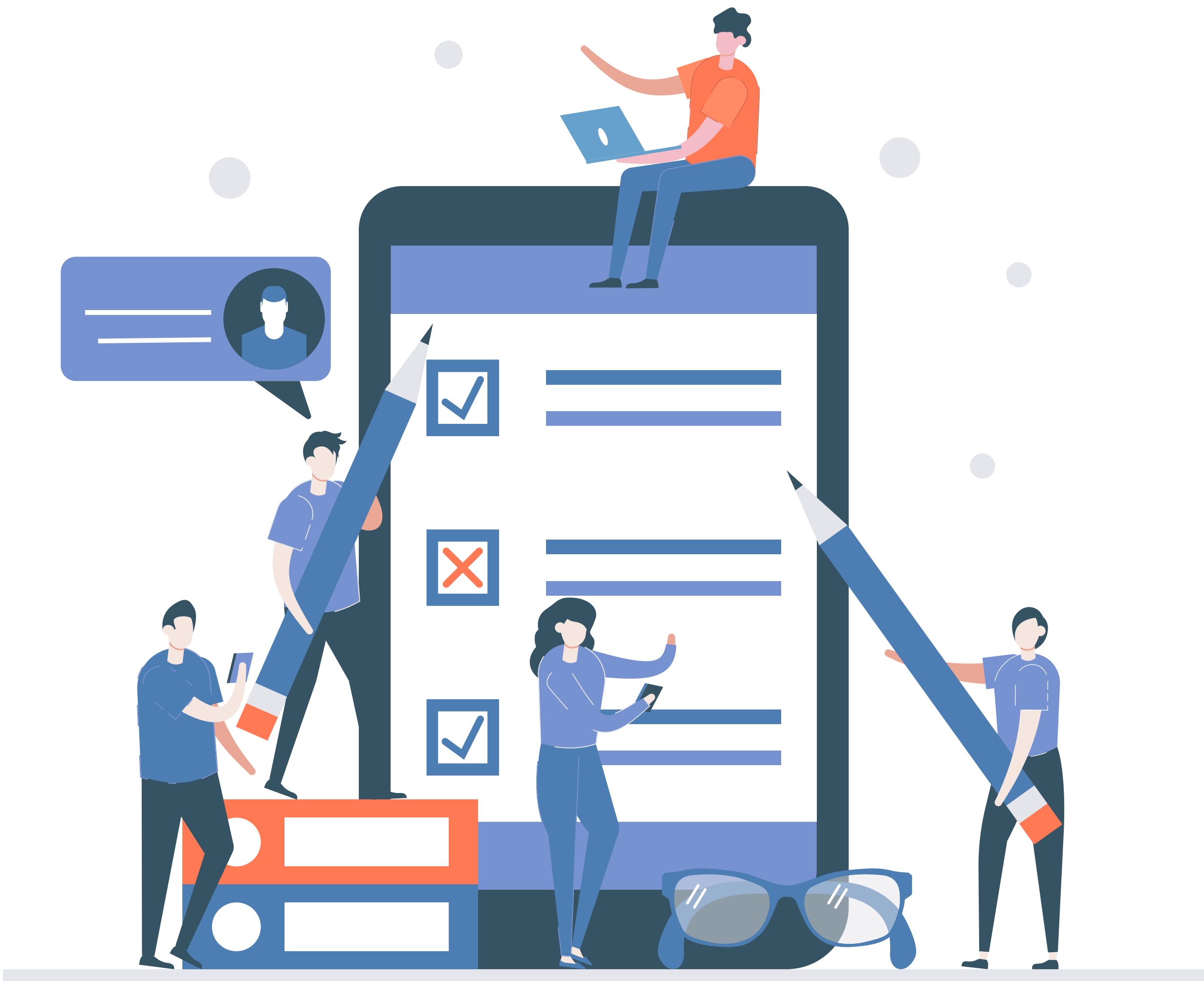
3. Customizable, mobile-friendly intake

Intelligent, mobile-optimized intake forms are another key feature to look for. Ideally, your CRM should include customizable, logic-based intake forms that help you complete client intake and qualify leads more quickly.

Logic-based intake forms can be customized to guide your leads through the intake process by surfacing new questions based on a lead's previous responses. This also allows your firm to customize intake forms so that they can qualify leads automatically based on their responses to key questions—saving your intake team time and allowing less experienced team members to still easily handle client intake.

You should also make sure that your CRM offers intake forms that are mobile-friendly.

Anything you can do to make the intake process as painless as possible for leads will decrease the number of leads you lose from your intake funnel—and many potential clients now prefer to fill out forms conveniently from their phones.



4. Dashboard analytics and reporting

When implementing a good legal CRM, your firm should quickly see improvements in your workflow efficiency and marketing ROI—but fully optimizing your law firm's client intake and marketing efforts is an iterative process.

Whatever CRM you choose should also feature in-depth reporting tools and analytics dashboards to help you assess your workflows and better target your marketing spend. Understanding where your best leads are coming from, which marketing channels are most successful for your firm, and where leads are stalling in your intake pipeline helps you adjust your intake and marketing practices to grow your practice more quickly in the future.

5. Two-way texting

Many CRMs give you the ability to send texts, but most CRMs send texts from a number that clients and leads can't actually respond to.

This not only makes your leads more likely to disregard your texts as spam but also means they'll have to call or email to respond—a hassle for both of you that makes organic communication more difficult.

The right CRM should let you send personalized texts from a number your leads and clients can text back. It's also worth looking for a software that lets you text videos, pictures, and one-click e-signature links. Since texts are opened at a much higher rate than emails, these features can make it much easier to quickly and reliably move your leads toward becoming clients.

6. Integrations with your other software

A CRM is a powerful tool for law firms—but it probably isn't the only software your practice will rely on for day-to-day operations.

As you consider your different options for a law firm CRM, you'll want to make sure the software you choose offers robust integrations with your other software support, including:

- Document software like Microsoft 365
- Email and calendaring software
- Legal practice management software

Finding a CRM that can integrate with your law firm's practice management tools is especially important. The right CRM should be able to sync with your firm's practice management software to import key data from the client intake process, so you can transition seamlessly from onboarding a new client to handling their case.

7. Software support

Finally, you'll want to invest in a CRM with a strong reputation for exceptional customer support. Between migrating your data and adjusting your workflows to the new software, it can be hard to properly implement a CRM without reliable software support and training.

The right CRM should have an experienced, accessible support team that can offer you thorough training, help with data migration, and customize the software to meet the unique needs of your firm and its workflows.

Get started today with the #1 CRM for law firms

Law Ruler is an industry-leading CRM built specifically to meet the needs of law firms. In addition to all of the features mentioned above, Law Ruler is the only law firm CRM to feature a built-in softphone dialer.

Using Law Ruler's unique softphone, your attorneys and staff can automatically prioritize the most pressing calls and dial leads directly from the CRM software in only a single click. This not only simplifies call management and boosts efficiency but also allows your firm to automatically track and record outgoing calls, so your firm has a clear, transparent record of who has made calls to which leads and when.

If you're ready to see the difference a legal CRM can make for your firm, get in touch today to schedule a demo.

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