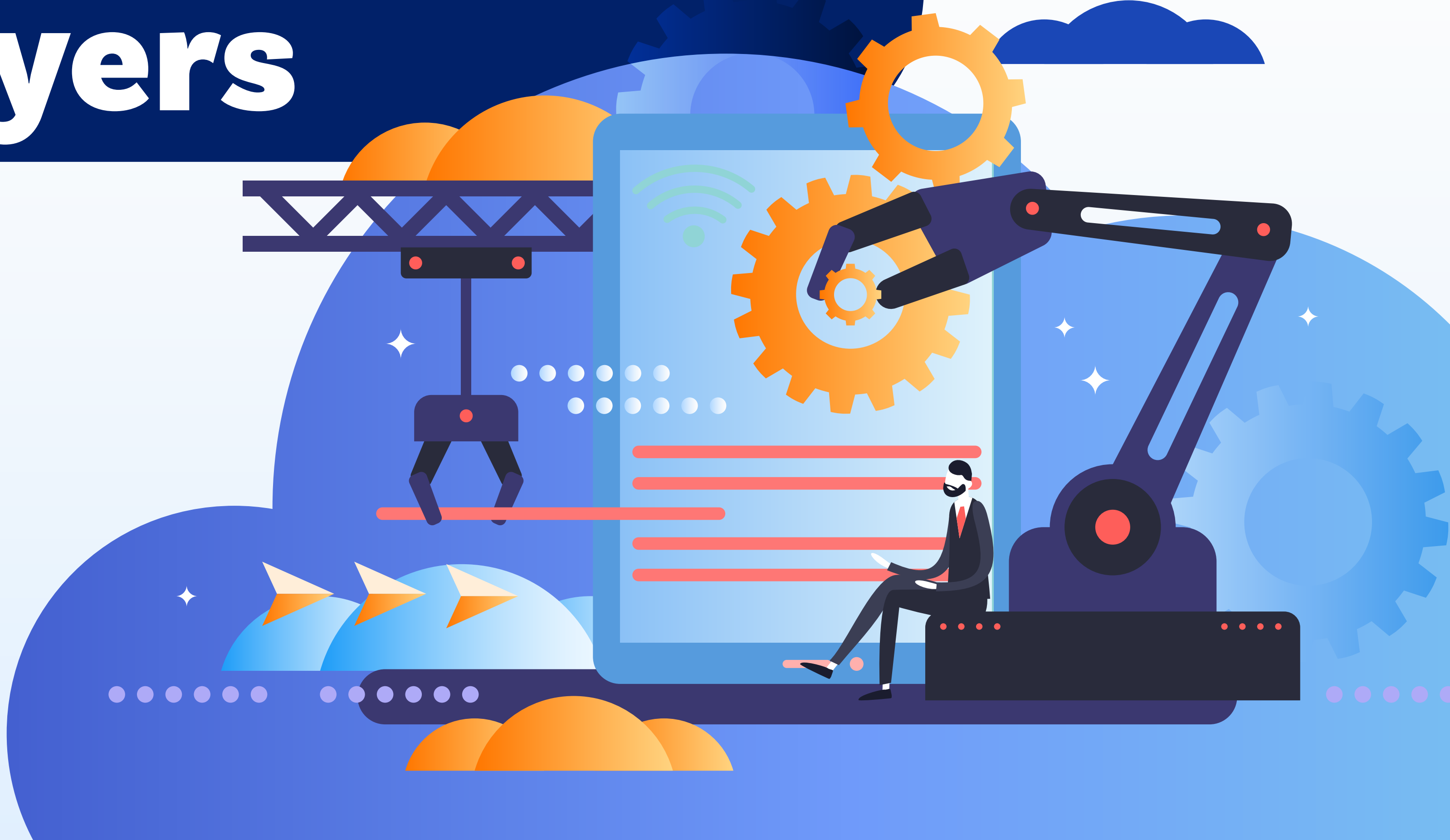
Law Ruler

10 Automation Basics for **Personal Injury Lawyers**



Tight turnarounds…

Mountains of research…

An overflowing inbox…

Unmet revenue goals for the quarter…

Life as a personal injury attorney can feel overwhelming.

If your workload is too much to manage, the solution could be right in front of you: your client relationship management (CRM) tool.

Automate your law firm with your legal CRM

You use your **legal CRM software** to track and manage client contacts, but it's capable of doing so much more—including reducing your stress level!

In this ebook, we'll look at the ways your personal injury law firm can use your CRM software to implement automation, strengthen client relationships, and remove redundant tasks from attorneys' plates.

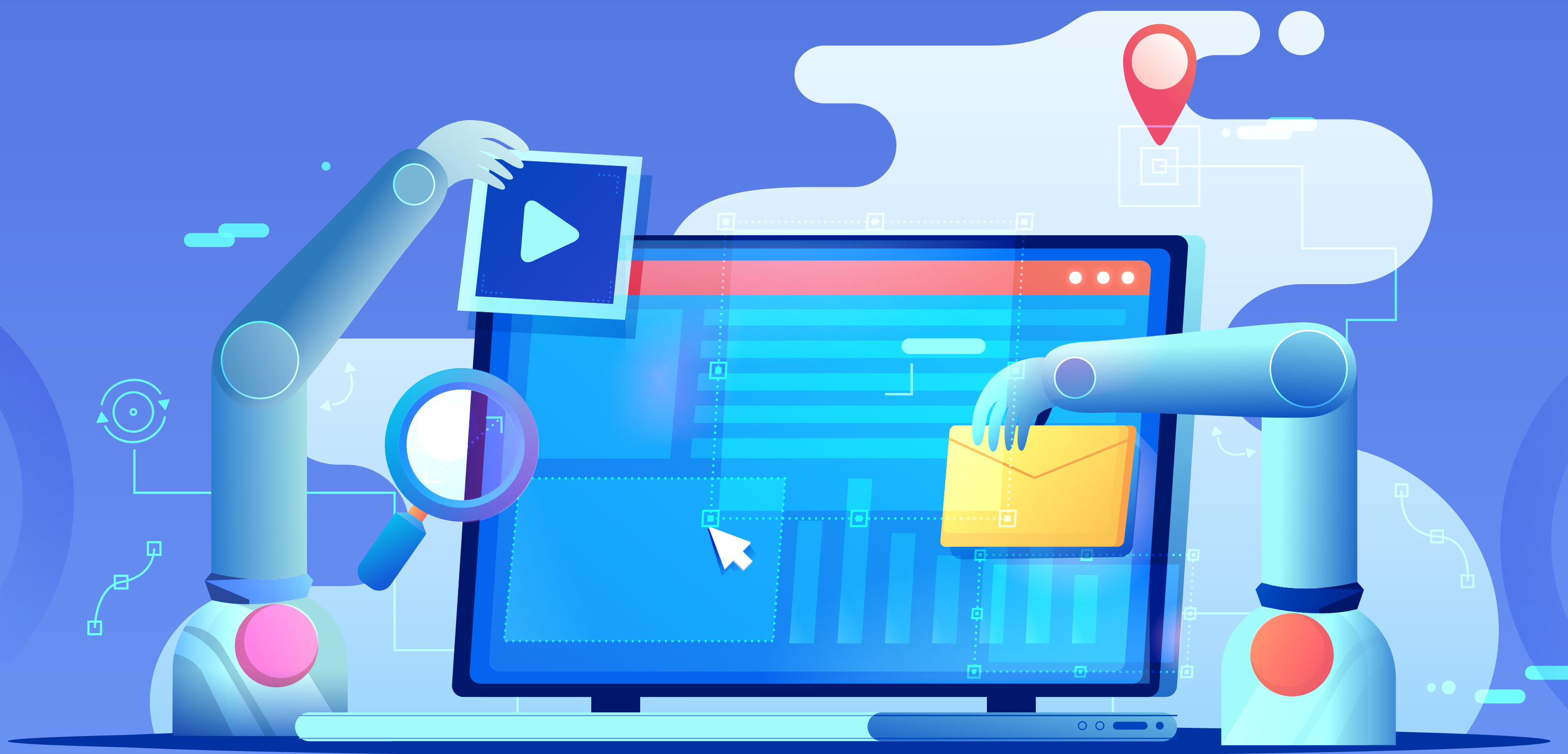
1. Marketing Automation

For any law firm, attracting new clients is an ever-present and time-consuming task. Legal automation tools embedded in your CRM can simplify your marketing to-do list.

“Rather than chasing potential clients, attract them with personalized drip marketing campaigns that include a variety of high-impact pre-recorded calls, text messages, and emails.”

When combined with tailored messaging and content, drip marketing campaigns can coax potential clients towards a particular goal, such as scheduling a free consultation.

Tailor your marketing automation:



Create custom triggers in Law Ruler to define how and when content will be delivered to potential clients. For example, clients who indicate they were in an auto accident on your contact form could receive an article detailing what type of evidence is most helpful in these types of personal injury cases.

2. Qualify Leads in Less Time

Intuitive, logic-based intake forms that adjust according to leads' responses save time and ensure you're gathering exactly the right information at the right time.

With the right set up, these forms can even qualify or disqualify leads without hands-on attention, making it possible for any staff member to manage an intake with confidence.

Qualified leads on the go

Law Ruler's logic-based intake forms are also mobile friendly, so potential clients can easily reach out on-the-go.

3. Ditch Data Entry

If you're trying to streamline work at your law firm—and maybe get back a few billable hours while you're at it—leave the data entry tasks to your CRM. Your CRM can capture client data and automatically populate it across all of your integrated software solutions.

Less work, more trust

Aside from saving your wrists from hours of typing, this form of automation may actually increase client trust in your firm due to a lack of data entry errors.

4. Faster Follow-Up

Today's legal clients expect a superhumanly fast response after reaching out to your firm. Your legal CRM makes it possible to engage leads in an instant with automated text and email follow-ups.

But although they're sent at super-human speed, these auto-responses don't need to read as robotic or impersonal.

"You can incorporate client information stored in your legal CRM to create a more relevant, personalized message for each potential client."

Law Ruler feature: built-in softphone

When it's time for a more direct discussion, legal staff can click to call each lead using Law Ruler's built-in softphone, which prioritizes leads based on their likelihood to sign with your firm.

"Local presence dialing" further increases the chances that leads will pick up, thanks to area codes that match the lead's location.

In addition to nurturing potential clients, you can also set your CRM to keep current clients in the loop about their legal matters. Law Ruler can send regular text or email updates, based on certain milestones completed by attorneys.

5. Automatic Appointment Scheduling

Trying to find a time to meet that works for everyone is taxing and takes up far too much of attorneys' time. Rather than playing—and losing—a lengthy game of phone tag, wow clients by letting your CRM do the heavy lifting here.

"Send a secure link to your schedule via text or email to book the appointment time most convenient for a client's schedule. Thanks to automation, all you'll need to do is show up! "

6. Gather Evidence by Text

Use your CRM's automated workflows to auto-send clients SMS text messages that prompt them to securely submit photo and video evidence related to their case.

Don't let outstanding requests slow your work down

Instead of pestering clients to deliver the necessary evidence, count on your CRM to send reminders at your chosen interval. Your clients will appreciate your diligence, and you'll have one less thing to remember.

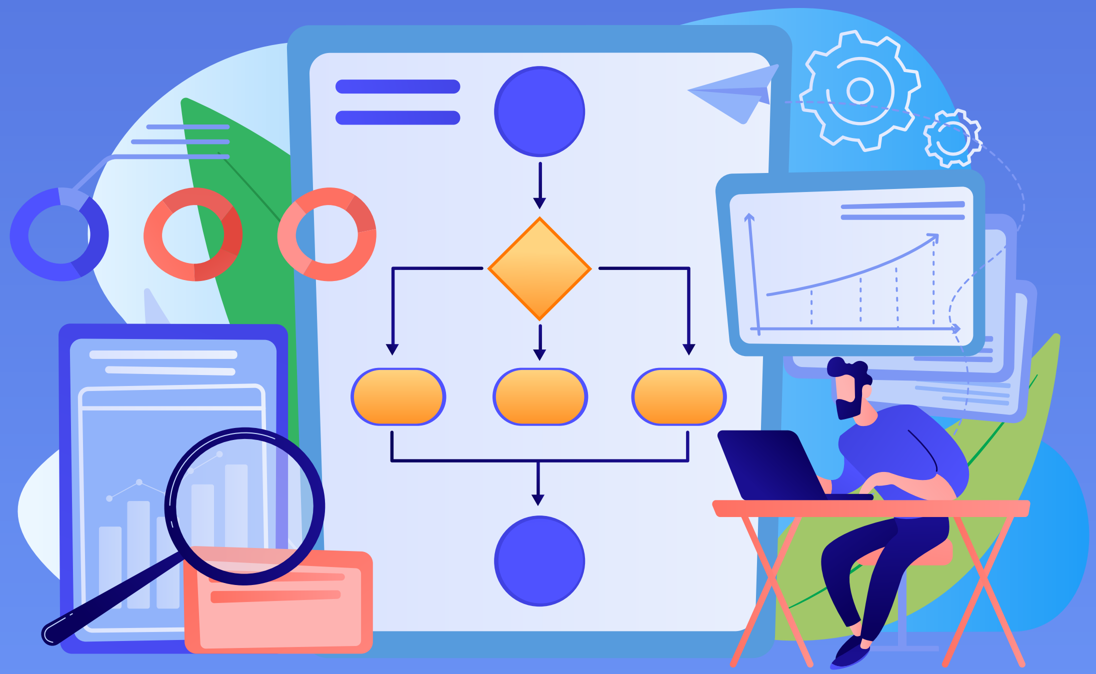
7. Track Leads Effortlessly

Where Excel spreadsheets once reigned supreme, your CRM can do the job better—and with less distractions from billable tasks.

Your CRM helps you monitor each step of each client's journey, from the first point of contact to the conclusion of their legal matter. Never wonder again whether that client received a call back.

"All correspondence is easily accessible by all relevant team members and your next step is always clear."

8. Automated Workflows



Apply automated workflows to your firm's outreach efforts and avoid unnecessary tasks in your client intake process. Automate the redundant tasks, as well, to streamline leads' flow through your client intake pipeline.

9. Draft Documents in Minutes

Legal document automation transforms the process of drafting lengthy documents. With your legal CRM, you can complete in a matter of minutes what used to take hours or days.

Instead of manually typing client data into documents, use custom fields to merge data from your CRM into PDF and Word documents.

Because this process doesn't require fatigued attorneys to type a client's name or address for the 5th time, data entry errors are eliminated. Your clients will enjoy peace of mind that their legal documents are accurate, boosting their confidence in your firm.

Custom templates and an online editor allow you to collaborate with teammates to develop a legal document that represents your client—and your firm—well.

Use Law Ruler to securely deliver the final draft and invite the client to add their signature via text or email.

10. Automated Reports

Make sound decisions about the future of your firm with actionable analytics reports. Law Ruler's custom analytics reports are easy to generate on demand, but can also be automated to arrive in your inbox with the frequency you prefer.

Rather than getting overwhelmed by an onslaught of information, choose to keep your analytics reports as succinct as you like. Include only the details most relevant to your current goals.

> *Explore in-depth data on staff productivity, case metrics, new client sign ups, marketing return on investment and so much more—with no data analytics experience needed.*

Reduce Your Workload With Law Ruler

Automation offers myriad benefits for clients and attorneys. With Law Ruler, it's possible to drastically reduce your team's workload while simultaneously increasing the profitability of client work.

Very little learning curve is needed to engage and onboard leads—no matter the size of your firm.

Schedule your free demo of Law Ruler today to see firsthand how automation can overhaul daily operations at your personal injury law firm.