

# The 5 Steps to the CRM Process

Get the best results from your customer relationship management (CRM) software by using it intentionally. The CRM process transforms strangers into loyal clients by building high-quality relationships in five steps:

1

## BUILD BRAND AWARENESS

Potential clients want to get to know your firm—and your CRM is a powerful tool to introduce yourself. Deliver content that tells your firm's story, values, and more through personalized text and video messages.

Use in-depth reports to determine which content performs best and develop even better outreach campaigns.



## GAIN LEADS

Your CRM collects a wealth of information from intelligent intake forms. Use it to categorize potential clients into segments based on traits like:

- Age • Location
- Communication method
- Interests • Legal needs

Personalize and tailor your communications to each segment to improve your outreach efforts across the board.

2

3

## CONVERT LEADS INTO CLIENTS

Don't waste time calling cold leads. Law Ruler qualifies leads and tracks their communications with your firm to determine how likely they are to purchase legal services. Then, Law Ruler places the most receptive leads at the top of your list.

When the time is right to follow up personally, you'll know exactly who to call first.



## PROVIDE TOP-NOTCH CUSTOMER SERVICE

ENurture your law firm's reputation and growth. Deliver quality customer support whenever, wherever, and however your clients prefer to get it. Law Ruler's easily accessible records enable your team to provide knowledgeable, relevant assistance on demand.

4

5

## DRIVE UPSELLS AND CROSS-SELLS

Use your CRM to encourage your existing clients to access related legal services seamlessly. For example, your email drip marketing campaign might send clients seeking Medicaid planning services additional information about estate planning.

When the time is right to follow up personally, you'll know exactly who to call first.



Your clients need to know that you're on their side, no matter what. Law Ruler's intuitive features ensure that your dedication and expertise are consistently communicated from intake to case closed.

Turbocharge your firm's growth with Law Ruler.



[Schedule a demo](#) to learn more today!

