



Law Ruler

by **vprofitsolv**

*How to Improve Your **Client Intake Process** with Legal Call Centers*



The client intake process is necessary for your firm's success, but it can be incredibly time-consuming. It can be a challenge to carve out time in your day to answer questions, schedule consultations, and determine qualified leads, alongside everything else on your to-do list.

The client intake process is your prospective client's first introduction to your legal practice, and for that reason, it's important to get it right. That said, [74% of US law firms](#) feel that they're spending too much time on administrative tasks, rather than practicing law.

So how can firms balance their billables and stay on top of the administrative requirements for new client intakes?

The answer for many firms is virtual receptionist services and legal call centers. These services may seem unconventional at first—perhaps it calls to mind a dingy office full of unhappy and unqualified workers. But the reality is that qualified, experienced legal call centers and virtual receptionists can transform your administrative processes and alleviate numerous pain points in your day-to-day operations, all while providing an improved client experience with your firm.



What are legal call centers?

Legal call centers are businesses that provide virtual receptionist services specifically for legal practices. They can also be called legal intake call centers, call centers for attorneys, or answering services for lawyers. A legal call center enables your team to be more productive during the day and is often more cost-efficient than hiring an extra full-time receptionist.

Because legal call centers like [Ruby](#) or [Smith.AI](#) focus exclusively on providing virtual receptionist services to legal practices, their professional staff are experienced with the requirements and processes necessary for working with law firms. This means they require less onboarding and can easily customize their services to your firm, making their team a seamless extension of your own.

What services do legal call centers provide?

Legal call centers offer a variety of services:

Screening potential clients: If a potential client reaches out, your virtual receptionist can discuss your firm's services with them to see if your firm is a good fit for their needs. A virtual receptionist can respond to frequently asked questions like the location of your practice, and whether you're accepting new clients, with preset answers.





Provide call summaries: legal call centers track every call and provide daily email summaries for your firm to review.

Schedule appointments and consultations: legal call centers can integrate with most scheduling software. Receptionists can schedule consultations for qualified leads, as well as calls or in-person meetings for existing clients. If your firm needs to reschedule or send out meeting reminders, call centers can also make outbound calls.

Perform client intake: once a legal call center has screened for qualified clients, they can help leads take the next step towards becoming clients by performing intake.

Screen for priority calls: firms can provide a “VIP” list of clients or contacts to be forwarded straight to your office, alongside live call transfer notifications, so you never miss a critical call.

Legal call centers do all this work with a deep understanding of the industry, your brand, and your business goals. As a result, you can provide a consistent client experience from the very beginning.

How legal call centers can transform your client intake process

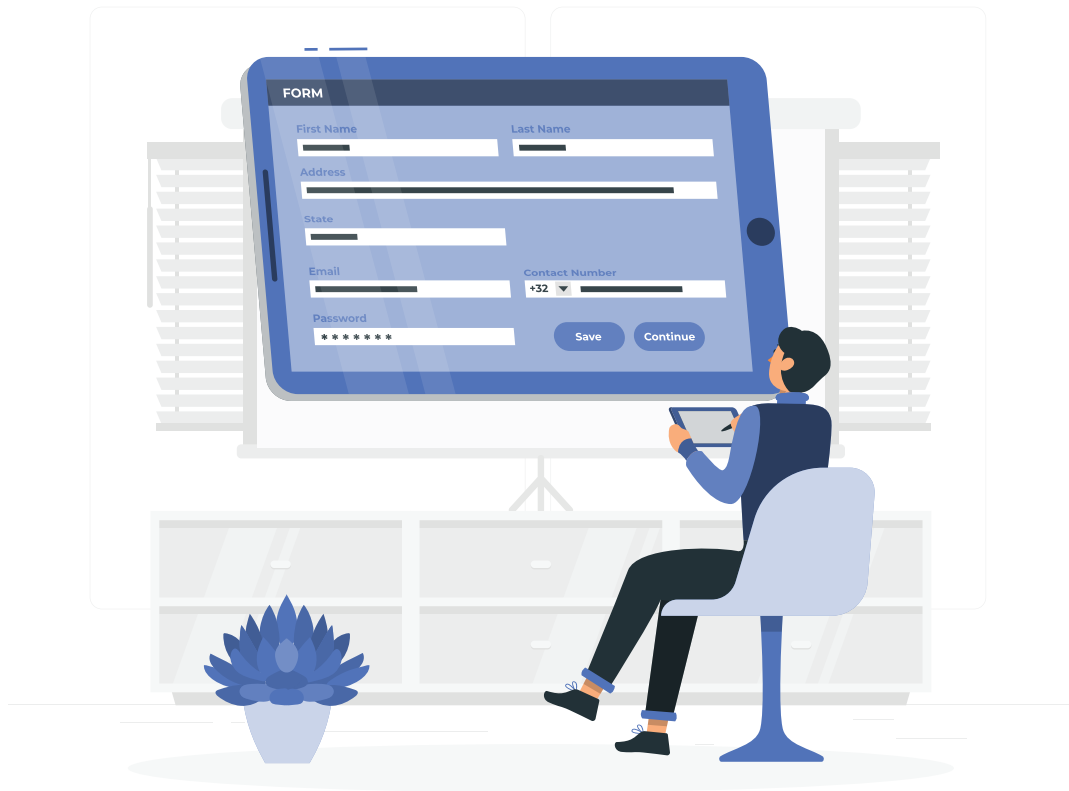
When it comes to client intake and administrative tasks in a legal practice, the key is to work smarter, not harder. Legal call centers work for you to provide a seamless client experience while reducing your non-billable workload at every stage of the intake process.

1. Fielding and responding to inquiries

Rather than a traditional receptionist who's only available nine to five on weekdays, virtual receptionists field calls from potential and current clients 24/7. Because customers typically reach out to several legal firms for their time-sensitive needs, providing an immediate response to inquiries can be a differentiator for your firm, providing a strong first impression.

Furthermore, legal call centers work with legal practices to establish a fielding process for potential clients. This can save firms significant time by separating out qualified leads and moving them on to the consultation process.





2. Client intake forms

If your firm requires client intake forms to be filled out prior to consultations for necessary background information, legal call centers can walk individuals through these intake forms over the phone and log the data into your client database. This step ensures that you have the information that you need, when you need it.

Another option is to implement smart intake forms via a legal CRM to help start the intake process. These forms can automatically qualify leads before connecting them with your legal call center to schedule a consultation.

3. Scheduling consultations

For qualified leads and existing clients, virtual receptionists can coordinate schedules between a client and your firm and schedule appointments—a complex task that can involve a good deal of juggling and back-and-forth between both parties.

They can also reschedule appointments as necessary and send reminders to ensure that no one misses an important meeting and that all relevant parties can attend.

4. CRM integration

One of the great things about legal call centers is that they can integrate with your customer relationship management (CRM) software so that everyone involved has the same information. This can dramatically reduce redundant administrative tasks and streamline your client intake process.

For example, both [Smith.AI](#) and [Ruby](#) integrate with [LawRuler's CRM](#), providing a number of benefits to your firm:

- Client data logged from interest calls can integrate with your CRM, reducing manual entry
- Meetings scheduled by your virtual receptionist integrate with your calendar and pop up in real-time
- Client intake forms are synchronized with your client database
- You can use the data that legal call centers collect in your CRM's data analysis, providing detailed and actionable insights to help your firm grow its practice

5. Ongoing client service support

Once a qualified lead transforms into a new client, virtual receptionist services will continue to provide ongoing client service support for your team, from ongoing scheduling to fielding calls and providing call summary logs. The result is that you can rest easy knowing that while you're taking care of your clients and their immediate needs, nothing will fall through the cracks.



Learn more about client intake and legal CRMs with Law Ruler

When it comes to automating administrative work for your practice, it's advisable to start small and work step by step to fully integrate these systems into your practice. Think about where your practice is spending too much time, and start working towards a smarter solution today.

Many firms start with legal CRMs, which consolidate and automate a significant portion of your data entry and client information, before integrating legal call centers.

Law Ruler's CRM provides comprehensive client intake software that will help you attract and retain new clients for your law firm. Our suite of services streamlines the client intake process through:

- Automating redundancy and data entry
- Customized online forms
- Document automation
- One-click e-signature and secure file-sharing

Explore how your team can build long-term, sustainable growth. Contact us to discover why Law Ruler is the preferred client intake, legal CRM, and marketing automation software for law firms of all sizes.

Book a demo to see how Law Ruler's client intake software simplifies your legal practice and increases your productivity.

BOOK DEMO

Client Intake