



Law Ruler
by vprofitsolv

4 Reasons Why Your

Family Law Firm

Needs a **CRM**



The foundation of a family law practice lies in building strong relationships with clients and guiding them through difficult life situations. Long-term, sustainable client relationships are a key factor in a firm's growth and success.

While these relationships are a critical component of any practice, maintaining client relationships can be a drain on resources and can often take up time that team members simply do not have.

That's where legal CRMs come in.

A legal CRM can help family law practices connect more efficiently and effectively with clients, allowing personalized legal service without more work from legal staff.



What is a CRM?

A client relationship management (CRM) system is software that manages an organization's relationships with clients and prospective leads. The goal of a CRM is to facilitate relationships and a business's growth through increased connections and touchpoints with clients, as well as provide actionable data to inform your business goals and marketing objectives.



CRMs are a fantastic resource for marketing efforts, from cross-selling and educating clients about new services to separating out qualified leads and maintaining long-term relationships.



Your CRM should also decrease the amount of effort it takes to do this work. In general, a CRM allows a business to complete a number of administrative and analytical tasks through some level of automation, such as:

- Tracking historical data on contacts, referrals, and clients
- Generating reports on past services
- Creating contact lists for client touchpoints, e.g. events, new service offerings, or new laws relevant to specific specialties within a practice



What makes a legal CRM different?

An industry-agnostic CRM can be generalized across any profession. However, family law offices have limited time, and customizing a basic CRM to meet their needs can be a significant project.

Legal CRMs are specifically designed for legal practices. Because they are specifically designed with the workflows, client needs, and compliance requirements of the legal field, legal CRMs have advanced functionality without the need for advanced system customization.

What time-saving features does a legal CRM offer?

A legal CRM functions as a centralized database that tracks information about clients and prospects, making tedious but significant administrative tasks much easier to handle.

Key features include:

- Client intake
- Client communications
- Contact management
- Document management
- Lead management and tracking
- Scheduling and follow-up
- Revenue tracking



How a legal CRM can improve your client relationships today

While implementing any new tool should be part of a clear strategy at your legal practice, a legal CRM is valuable software that can quickly deliver a substantial return on investment. Just look at these four benefits it provides.



1. An improved client intake process

Clients in search of a family law practice can have a diverse set of needs, which may or may not be a fit for the services your team provides. It takes up a lot of time to go through a consultation booking and appointment, only to find out that the client is looking for something outside of your wheelhouse.

A pre-intake form is a great way to facilitate initial client intake conversations and to understand whether or not a prospective client is a qualified lead for your team. CRMs can be used to pre-screen clients, meaning you can solely focus on the leads that are a good fit.

They also can save you time by **automating data entry** from these forms. If you capture the right information and store it correctly, then your firm becomes well-positioned to capitalize on that data and use it to build a stronger connection with a future client.



2. Increased client touchpoints for lead generation and nurturing

Firms can nurture leads with a legal CRM through [email drip campaigns](#), which educate clients on your practice areas and legal services. Drip campaigns play an important role in increasing your client touchpoints, which can make a substantial difference in how likely a potential client is to convert—because it can take up to eight touchpoints to turn a prospect into a client.

These systems can take some planning to set up at first, but once established, they can save you time while improving client relations and increasing your revenue.

What are email drip campaigns?

Email drip campaigns are a strategic set of pre-written messages built for a specific purpose.

For example, for client intake, a drip campaign can slowly and steadily lead prospective leads on a journey toward understanding your firm and what you can do for them. An email drip campaign can be an effective way to demonstrate to potential clients that your law firm has the experience they need. When properly implemented, email drip campaigns can significantly increase your opportunities to sign new clients.

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Beyond client intake, email drip campaigns are a great resource for family law practices. Firms can use email drip campaigns to:

- Generate referrals
- Run a welcome campaign for newly converted clients
- Request reviews following completed legal matters

Successful law firm drip campaigns achieve a high level of engagement with potential and existing clients while reducing the time that attorneys spend on marketing every week.

By integrating a legal CRM with an intentional email drip campaign, your law firm stays top of mind with prospects, leads are well-informed about the value you offer, and your clients feel more connected with and aware of your practice.





3. *Easier communication during legal matters*

When it comes to staying on top of appointments, document signatures, and follow-ups, the right legal CRM can help family law practices provide consistent communication with their clients. Teams can also use CRM technology to better meet clients through their preferred methods of communication.

Many clients prefer texts over telephone calls or emails. With the right CRM platform, law firms can easily automate personalized text messages for appointment reminders or outstanding documents.

Use automated texts and voice calls for:

- Follow-ups
- Consultation information
- Appointment confirmations
- Court date reminders
- Trust fund replenishment requests
- E-signature requests

With Law Ruler, eSignatures are binding and secure, eliminating tedious print paperwork. Furthermore, legal CRMs with secure file-sharing and eSignatures facilitate a more-efficient document-sharing process.

By using [eSignature](#) requests in tandem with automated reminders, a family law practice can reduce administrative tasks and tracking.



4. Save time through task automation and document assembly

CRM software that features automated workflows can reduce the amount of time you and your team have to spend managing client intake and marketing tasks. When you set up task templates, it becomes much easier to set projects in motion—and it certainly decreases the mental energy required!

A legal CRM that offers document assembly can automatically deliver the document package of your choice to clients with custom document templates, shaving hours off of complex document assembly. Furthermore, data entry redundancy through software synchronization also minimizes manual entry, such as client intake responses.



You can also turn to robust, automated reporting tools to gain provide a birds-eye view of critical KPIs.

All of these time-saving processes add up, enabling a family law practice to spend more time supporting their clients and providing quality service.

Find the right legal CRM for your practice with Law Ruler

Let Law Ruler's experts help you and your team experience an efficient, data-oriented legal CRM. Our goal is to simplify your operations to help your family law practice grow. Whether it's improving data analysis and metrics tracking or nurturing a referral marketing program, every firm has room to streamline processes and optimize marketing and client administration efforts.

Explore how your team can build long-term, sustainable growth. With automated appointment scheduling and email and text messaging, building strong relationships with your clients has never been easier.

Schedule a Demo

CRM