

Optimizing Client Intake: Integrating Your CRM with a Legal Call Center



Does your firm rely on traditional processes—or no process at all—to attract and onboard new clients? If so, modernizing your approach to client intake may seem time-consuming and expensive. You may even wonder if it's worth the effort at all!

But lead generation and client intake are some of the first experiences your clients will have with your law firm. It's critical that you position yourself as responsive and in touch with your clients' needs.

Fortunately, integrating your law firm's client relationship management (CRM) software with a legal call center can help you create the right client impression. It's a fast and affordable way to uplevel your client intake process while saving time, money, and hassle

Call centers and CRMs: individual powerhouses

Although many law firms have CRM software such as Law Ruler, not all of them are using it effectively. As you explore the many capabilities of your legal CRM, you may find it surprising just how many areas of your firm it can impact, especially client intake.



What is a legal CRM?

Legal CRM software makes managing prospective and current clients a straightforward process by keeping crucial information close at hand. A high-quality legal CRM is so much more than a digital address book—it's the heartbeat of a successful law firm.

It includes features to streamline your law firm's daily operations, such as:

- Automated follow-ups by email or text message
- Task and project management tools
- Built-in softphone
- Dashboard analytics
- Intake form software
- Customized online forms
- Document automation
- One-click eSignature



Benefits of legal CRMs for client intake

Legal-specific CRM software holds the power to completely transform the way your firm initiates relationships and onboards new clients.

The advantages of legal CRMs for client intake include better organization, efficiency, and automation.

Improved organization

Show potential clients that you're listening with timely responses. The [best legal CRM software](#) offers features well beyond a simple contact list. While the consolidation of potential clients' emails, phone numbers, and stage of intake is a time saver, the ability to review all communications with a single client in one window leads to more thorough follow-up.

Less busywork

With legal CRM software, it takes just one click to autofill important client information on forms, emails, and more, which saves attorneys valuable time. Plus, less retyping of names, addresses, and social security numbers means fewer opportunities for costly

Automated

Intake-specific features such as customizable form builders and templates allow your law firm to auto-screen prospective clients.



Even your forms are a chance to improve the client experience. The fields in Law Ruler's logic-based intake forms automatically adjust to potential clients' answers, making the process quicker and easier for them.

What is a legal call center?

Virtual call centers provide businesses with remote receptionist services, such as answering and returning phone calls.

Sometimes, legal call centers are called answering services—but that seems like a bit of a misnomer when you consider just how much a virtual receptionist can accomplish for your law firm. Yes, they answer calls, but they can also provide thorough answers to questions, help schedule appointments, and provide an essential client service touchpoint. After all, they are customer service professionals.





Integrating legal call centers boosts the benefits of legal CRMs center?

From screening potential clients to answering basic questions about your firm, legal call centers can take non-billable work off of attorneys' already heaping plates—and your legal CRM helps them do it.

Legal CRM software that [integrates](#) with legal call center services like [Ruby](#) or [Smith.ai](#) arms virtual receptionists with the tools and knowledge they need to become a seamless extension of your legal team.

The dream team: upleveling client intake from start to finish

Your legal CRM is a dynamic force for client intake all on its own. Still, adding the personable touch of a legal call center enhances your legal CRM's improvements to the traditional intake process.

Virtual receptionists provide personal and timely service to prospective clients—*without* you having to spread yourself too thin to deliver top-notch quality service.

Managing partners are sometimes concerned that relying on a legal call center will decrease the quality of customer service. But with your legal CRM keeping everyone on the same page, the quality of your customer service will only increase by adding a legal call center to the mix.

Virtual receptionists who specialize in the legal industry have a keen understanding of what the client intake process involves. Plus, reputable legal call centers will take the time to understand your business goals and branding. Instead of robotically reading a generic script, they'll make sure that your brand's personality is reflected in each communication with prospective clients.

Benefits of adding a call center to your existing client intake process

Virtual receptionists partner with your CRM to upgrade [every stage](#) of the client intake process. Let's look at five phases: prospects, lead nurturing, pre-screening, initial consult, forms, and onboarding

Attracting prospects

Just because a prospective client calls to learn more doesn't mean they'll commit to working with your firm. Until they do commit, your firm should treat each interaction with a prospective client as an opportunity—make the most out of each one.

Imagine: it's six in the morning and a prospective client just opened an email from your latest drip marketing campaign. She scrolls through your blog and winds up with some questions about your firm. If she calls or contacts you through the chat feature on your website, will someone answer?

If you're leveraging legal call centers in your client intake process, the answer is yes! First impressions count. When your legal call center answers her questions immediately and thoroughly, she'll assume that your law firm is reliable and responsive at all times.

With both tools on your side, your law firm's branding and tone can remain consistent across every platform including telephone, text, email, live chat, and social media chat. This seamless communication between a CRM and legal call center combo will immediately stand out to prospects.

Lead nurturing

Hot leads grow cold one missed call at a time.

It takes between five and eight touchpoints to transform a prospective client into a current one. Every interaction with your law firm—whether with an attorney or a virtual receptionist— should demonstrate the value you offer your clients.

If you're missing or ignoring calls due to a jam-packed schedule, those leads aren't warming up. When a legal-specific call center catches those calls, your firm consistently builds trust and raises brand awareness no matter how busy you get.

Using a legal call center allows you to provide potential clients with shorter call-handling times and helpful interactions across multiple points of contact. Coupling your legal CRM with your legal call center ensures that your law firm is positively represented at each of those points of contact by providing every virtual receptionist an at-a-glance summary of that potential client's needs and position in the sales funnel for tailored service.





Pre-screening

Although it can gather useful information for your CRM, your contact form on its own isn't enough. Some prospective clients will always prefer to speak with a real person about your law firm. Nobody said that "real person" has to be you, though.

Instead of answering every phone call from curious leads, lean on legal call centers to filter your calls so that only paying or onboarding clients get through to you.

Your virtual receptionists can also respond to frequently asked questions about your legal practice—like your location, fee structure, and availability—with preset answers, leaving you with fewer fruitless calls to field.

Initial consultation

Eliminating the back-and-forth of comparing calendars is simpler than you think. As virtual receptionists schedule initial consultations with qualified prospective clients on your behalf, your legal CRM will automatically add anticipated court and meeting dates to your calendar, too.

Combining automated text and pre-recorded voice call reminders from your CRM, with the personal touch of live outbound calls to confirm appointments, reduces no-shows and cancellations for initial consultations. Potential clients will appreciate the opportunity to ask last-minute questions. Plus, this thorough preparation showcases your firm's attention to detail.

Form execution

Virtual receptionists can improve data collection by directing clients to fill out your intake form online or even walking them through it over the phone. Data collected is entered directly into your legal CRM and can automatically populate in legal form templates.

Legal call centers can do more than walk potential clients through the logic-based client intake forms, though.

When clients who are in the onboarding process call the office with specific questions about forms and paperwork, a legal call center can flag these calls as high-priority. As your legal staff views the softphone in your CRM, they'll instantly know the order in which calls should be returned.

Onboarding

Speed up the onboarding process by providing your legal call center with a list of the most common questions your clients tend to ask during onboarding. New clients will also appreciate the convenience of receiving instant answers from your call center, instead of waiting for a call back from an attorney.

Since all client interactions are tracked in the CRM, parts of your onboarding process that frequently confuse new clients will become [identifiable over time](#), allowing you to continually improve the process.



Learn more about legal CRMs and call centers with Law Ruler

Ready to improve the way your law firm communicates with potential clients—and preserve billable hours in the process?

Our friendly, knowledgeable team of product experts is standing by to guide you through all that Law Ruler has to offer, so you can manage—and initiate—better, more consistent relationships with clients with ease.

Schedule a Demo