

Law Ruler

4 Reasons Why Your **Social Security Disability Law Firm Needs a CRM**





Social Security Disability firms have their own unique workflows, as well as their own set of challenges. Law practices that work with SSDI cases often encounter a high intake volume and require additional screening to identify qualified leads within the pool of interested applicants.

Furthermore, Social Security disability firms have to maintain consistent communication with clients and assemble countless documents for their caseloads. After all, applications and appeals processes can fall apart quickly without the proper documentation.

All of this is easier with the right software tools at your fingertips. Law firm CRM software can help you find, sign and build relationships with more clients in less time—all while streamlining and optimizing your marketing and intake workflows.

Why choose a legal CRM?

A client relationship management (CRM) system helps businesses facilitate relationships and growth through increased connections and touchpoints with clients. It can also provide actionable data to inform your business goals and marketing objectives.

In general, a CRM decreases the amount of hands-on work needed 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





While industry-agnostic CRM can be used across any profession, to be truly effective for law firms, they require deep customizations. The problem is that many law firms, including those that handle SSDI cases, lack the time it takes to develop a customized CRM for their practice.

This is where **legal CRMs** become essential.

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



Legal CRMs are a fantastic resource for marketing efforts, especially when it comes to separating out qualified leads and maintaining long-term relationships.

Legal CRMs can help you automate key parts of your intake process, lose fewer leads from your intake funnel, and build stronger relationships with clients.

Among other benefits, the right software tools can help your firm:

- Streamline client intake
- Qualify new leads
- Gather documentation
- Stay top-of-mind with prospects
- Identify practice areas for growth

Most importantly, you'll be able to help your **clients access the benefits they deserve** more efficiently.



Four ways a legal CRM can help your Social Security disability law firm

1. Targeted marketing outreach

If growth is your goal, then targeted marketing outreach is critical, not only to growing your pool of potential clients but also to strategically target pools of qualified potential clients. These are the clients that are most likely to need your services—and be interested in them.



Did you know it can take up to eight touchpoints to turn a prospect—even a qualified one—into a client? Targeted marketing outreach is the key to finding and nurturing those leads. The more touchpoints a lead has with your firm, the more likely they are to reach out.



However, when law firms use traditional or manual marketing methods, it is a significant and time-intensive role, one that many offices simply do not have the capacity for.

A legal CRM's **marketing automation tools** can streamline these processes, giving you more ways to connect with potential leads in less time.

Marketing automation helps SSD firms create more “touches” with leads. This can include:

- Email drip campaigns
- Text message marketing campaigns
- Phone campaigns through pre-recorded voice calls
- And more



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

Targeted marketing strategy and data analytics

The analytics tools included in your CRM can also help you focus your marketing efforts more effectively by helping you understand your marketing ROI and where most of your qualified leads are coming from.

Law Ruler’s [Dashboard Analytics](#) capabilities make it easy to analyze your marketing efforts and monitor KPIs through real-time data. These automated and robust reports help teams craft informed and intentional marketing strategies, both at the start of their marketing process and through ongoing iterations.

2. A streamlined, efficient intake and screening process

Inefficient intake processes can hinder your firm's ability to grow. A disorganized or manual intake process can be particularly harmful to SSD firms, who need to screen a high volume of potential clients effectively.

Rather than slowing growth and stagnating the client intake process, a legal CRM transforms it. Legal CRMs allow firms to **qualify new leads quickly and efficiently**, even when less experienced team members are handling intake.



CRMs can be used to pre-screen clients, meaning you can focus exclusively on the leads that are a good fit for your firm. Plus, intake forms can be customized to fit your specific criteria for the cases your firm wants to take. This process saves you time and allows team members with less experience to handle intake effectively.

A legal CRM also streamlines intake workflows with **automated data entry** and client intake tracking tools, which decreases redundant manual entry and administrative tasks.

On the client side, **mobile-friendly intake forms** also make your intake process easier for leads and decrease the chances of losing leads from your intake funnel.

3. Gather necessary documents faster

From helping clients file their initial applications to developing medical evidence, Social Security disability firms handle a lot of documents.

That said, many firms still rely on tedious, outdated methods for generating, sending and gathering documents. Because applications and appeals processes can quickly fall apart without the necessary documentation, firms need a system to process documentation quickly.



A legal CRM with document assembly functionality can automatically deliver the document package of your choice to clients with custom document templates, which shaves hours off of complex document assembly. Furthermore, data entry redundancy through software synchronization minimizes manual entry.

In addition to document assembly, Law Ruler's [eSignatures](#) are binding and secure, eliminating tedious print paperwork. And by using eSignature requests in tandem with automated reminders, law firms can significantly reduce administrative tasks and tracking.

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

4. Consistent communication with a high volume of potential and current clients



When it comes to staying on top of new clients, appointments, document signatures, and follow-ups, the right legal CRM can help your law practice provide consistent communication, even with a high volume of clients.

For example, a legal CRM can automatically send personalized follow-ups within seconds of a lead first reaching out. Firms can also schedule automated reminders for their attorneys about key deadlines and tasks, or send clients automated scheduling reminders to reduce the possibility of no-shows.

Teams can also use CRM technology to approach clients through their preferred methods of communication. Many clients prefer texts over telephone calls or emails, but 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

Firms can also communicate with current and potential clients through [email drip campaigns](#). 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 your practice.

You can run drip campaigns to:

- Generate referrals
- Run a welcome campaign for newly converted clients
- Request reviews following completed legal matters
- Alert clients of changes to state- or government-run programs

Find the right legal CRM for your practice with Law Ruler



Let Law Ruler's experts help you and your team experience a client-centered, data-driven legal CRM. Our goal is to simplify your operations to support the growth of your SSD practice.

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 with us today!