The Ultimate Guide to Running a Personal Injury Firm

Introduction

Whether you're the sole practitioner of a new practice or the manager/partner of a large, seasoned personal injury firm, you already know that running a law firm is hard. And, regardless of your experience in the field, you know that developing your firm is a never-ending process.

Successful managers are constantly looking for ways to improve their firm operations, and there's no shortage of strategies and guides to help them achieve their goals. Some are geared toward people just starting their practices; others are insightful for anyone doing the difficult job of building and growing a legal practice.

At backdocket, our job is to improve the way law firms work. Though our main tool is our practice management software, we've gained invaluable insights from working closely with law firms. Sharing what we've learned is another way we help firms work smarter.

At the end of this guide, we'll discuss how our practice management software helps personal injury law firms manage and grow their practices. However, the principles that follow aren't exclusive to backdocket users; they're practical and valuable tips that help any firm improve how they operate.

In this guide, we'll focus on three aspects of running personal injury firms:

1. getting more clients,
2. providing those clients with exceptional service,
3. and communicating effectively, both within your firm and to clients and third parties.

Let's begin with how personal injury firms can turn prospects into clients.

Chapter I

Growing your law firm means bringing in clients. For some firms, this means bringing in more cases. For others, it means bringing in cases more closely aligned with their goals.

You'll refine your process as you gain experience, but it's crucial you have a process.

1. Get Serious About Seeking Out Prospects

Finding potential clients is a long-term campaign, and it's all about making yourself visible. That means taking the following steps:

- **Have a website that showcases your firm's services**
- **Utilize offline advertising, if your budget allows it**
- **Get involved in your community through volunteering, speaking at events, and attending social gatherings**
- **Offer your expertise to local publications, radio stations, and TV networks**
- **List your firm in high-quality online directories**
- **Create social media accounts for your firm and update them frequently**
- **Build a referral network with other firms**

Bonus tip:
Building a referral network takes time and effort, but it will pay dividends for your firm. Attend networking events or simply pick up the phone to start a dialogue with firms you want referrals from. Remember that sending referrals is a great way to get them in return.

2. Keep an Ongoing List of All Your Prospects

If you're currently tracking prospects on paper or even in your head, you could be missing valuable opportunities.

The best way to keep an ongoing list of your law firm's prospects is to create a shareable, easily accessible list of names, contact information, and other relevant data.

Receptionists, paralegals, and attorneys could play unique roles in bringing in clients. Be sure that anyone who might need a prospect's information has access to it and can view, edit, and update this list.

Bonus Tip: Reassess your firm's prospecting strategy every three months. The busier your staff is, the more selective you can be about potential clients. Too many firms maintain a feast-or-famine mentality even when they should be focusing on the quality of leads that they're getting.

3. Touch Base Frequently

Now that you have a centralized list of prospects, it's time to start a dialogue. However, there's a fine line between cultivating relationships and overcommunicating with prospects.

You don't want a potential client to forget about you, so set reminders to reach out to your prospects at regular intervals.

- **Choose the communication method (phone, email, text, social media) that the prospect used to inquire about your services.**
- **Be concise when you reach out, especially when a prospect doesn't seem interested in chit-chat.**
- **Make sure team members aren't doubling your outreach efforts. Limit interactions so that one staff member is in charge of reaching out to each prospect.**
- **Offer a concrete plan for the next steps that you and the prospect will take.**
- **If possible, give the prospect more insight into their case, even if you are only giving them general information about personal injury law. This helps establish your firm as a valuable resource.**

4. Keep Thorough Notes of All Interactions

If a prospect gives you information about their life, it's worth remembering and including in your notes. This includes information about:

- **Their personal life—children, work, and other interests**
- **Their case—including experiences with other law firms or insurance companies**
- **Why they need an attorney—such as injuries, financial problems, or other challenges**

By having these insightful, easily accessible notes in front of you during your next interaction, you can better connect with your prospect by following up on the topics most important to them. You'll show you're genuinely listening to the things they say. This is a practice you can start using with your existing and former clients, too.

5. Frequently Revisit and Revise Your Online Presence

When a prospect is considering hiring you, they're likely visiting your website or reading online reviews of your firm.

You want to make sure that you're putting your best foot forward on all available platforms. Your website should include verdicts, settlements, and testimonials that your firm has achieved for clients. It should make a compelling case for hiring your firm.

Online reviews are equally important. If a prospect sees only negative reviews of your firm, they'll believe them. The best approach to getting better reviews is to ask existing and former clients to give you a review on Google, Yelp, or other platforms.

Bonus tip:
Make your website a valuable resource for visitors. In addition to telling potential clients about your personal injury firm's services, you can also tell them more about their individual legal issues. Provide educational materials in the form of blogs, infographics, guides, and frequently asked questions. You'll establish your firm as an authority on the types of cases you handle.

5. Frequently Revisit and Revise Your Online Presence

To make sure your staff isn't wasting time and energy, walk away from a prospect who is no longer interested. Once a prospect stops taking your calls or becomes short in their responses, the best thing to do is back off.

Even if a prospect doesn't decide to hire you this time around, they might remember you when they need help down the road. Maintaining a positive line of communication could also make a lost prospect more likely to recommend your firm to friends, family members, or coworkers in need of your services.

Chapter II

Consistently Delivering an Excellent Customer Experience

Your clients are experiencing a lot of uncertainty in their lives, and you're their guide through an incredibly difficult period. The more certainty and stability you offer your clients, the better their experience will be.

To provide exceptional service, think beyond just the results you're getting for them. Focus on the experience they have leading up to, during, and after their cases are complete.

6 Best Practices for Providing Outstanding Customer Service

1. **Don't make clients wait. When clients start thinking of themselves as their own case managers, your firm is venturing into dangerous territory. Be proactive by giving clients frequent case updates, appointment reminders, and quick responses to questions.**
2. **Explain the process. Don't assume clients know the steps required to handle their cases. Explain things thoroughly from the start and continue to do so throughout the process.**
3. **Inform your clients on developments. Anytime a milestone is reached, or a roadblock impedes progress, tell your clients. If you and your team have a meeting about a client, give them a briefing.**

   Responsiveness and accessibility are key. Your clients' questions are always important, so create an office policy to respond to all questions within 24 hours, if not sooner. Make sure your clients know they can reach you anytime.
5. **Send reminders to your clients. If there are important dates your clients should know about, whether it's meetings with your team or court dates, remind them so they can prepare.**
6. **Go to your clients. Whether it's for a free consultation, deposition preparation, or simply a check-in, visit your clients instead of asking them to come to your office.**

Bonus tip:
In the first chapter of this guide, we discussed the importance of keeping thorough notes of interactions with your prospects. This also best practice when working with clients. This information helps you cater your service to meet their needs, and it should guide interactions with your clients.

These are the building blocks of great client service, but we need to dig deeper to show clients how competent your firm really is.

Know the Status of Every Case

Your first priority is reaching out to a client before they feel the need to contact you.

If they do contact you, the last thing you want to tell them is that you "don't know" or "need to check" on the status of their case.

Case information should be frequently updated and available to many of your team members. By keeping this information current and accessible, you'll know that whenever someone at your firm speaks to a client, they'll be able to tell them exactly what's happening in their case.

Know and Care About Your Clients

Clients should always feel that you genuinely care about them and their cases. You already care about how your services will improve your clients' lives, and you shouldn't consider your clients' personal lives off-limits. Most will appreciate someone taking a real interest in their lives outside of their case.

In addition to making your clients happy, there's an added benefit to really caring about them: the more three-dimensional you see your clients, the better work you'll do for them.

How do you show you care?

- **Praise accomplishments, whether it's related to their case or something your client has done outside of your professional relationship.**
- **When you have interactions with your client, leave behind anything that could distract you. All client-focused meetings and phone calls are opportunities to focus solely on the needs of your client.**
- **Send out cards for special days. This includes sending out Christmas cards or birthday cards to your current and former clients.**

The more you work on being present with clients, the better you'll get at this crucial skill.

Take Feedback Seriously

Frequently ask your clients for their feedback on how you're doing. When you receive criticism in reviews, don't ask yourself if the criticism is true, but rather how that criticism is true and what you might do to address it.

Make it a practice to regularly ask your clients to leave reviews of your firm. Though online reviews are good for your visibility, they also give you invaluable insights into how clients experienced your firm.

Be respectful to anyone who took the time to offer their feedback, even (and especially) reviewers who aren't kind to your firm. Use those insights to look for weak points in your service, so you can find key areas to improve upon.

Tips for incorporating feedback and improving your services:

- **Schedule meetings with your team to discuss feedback and reviews from your clients.**
- **Look for recurring themes in the feedback you receive. For example, do clients complain that they don't hear back from your firm in a timely manner? If so, consider it an opportunity for improvement.**
- **Look for solutions, not someone to blame. If you notice shortcomings in your practice, recognize them as opportunities to do better work. Avoid creating a culture where individuals are called out. Instead, foster a team mentality where every member contributes to the progress your firm is making.**

Look Beyond Law Firms for Inspiration

It's tempting for personal injury firms to look at their competitors for inspiration. After all, they're vying for the same clients you are. However, remember that great ideas can be found in any industry.

Consider the experiences you have at some of your favorite businesses. Do you have a favorite restaurant or coffee shop that goes above and beyond to keep patrons happy? Does your dentist or eye doctor do small things that impress you?

Make notes whenever you have a loyalty-inspiring interaction with a business. Ask yourself if there's any way you can replicate that experience at your firm.

Let Technology Do the Heavy Lifting

Automation is one of the most powerful yet underutilized benefits of business technology. You can use automated processes to perform several tasks, including:

- **Reminding clients of important appointments, meetings, court dates, and deadlines**
- **Sending follow-up surveys to clients after meetings**
- **Prompting clients for feedback once you've completed their cases**
- **Reminding you and your staff to follow up on a records request**

Automating these tasks frees you up for other important work and offers your clients guidance throughout their experience with your firm.

Once You've Identified Strategies, Implement a System

The many tips above provide actionable advice that you can use to improve your customer service starting today. Now that you know what you can do to improve your clients' experiences at your firm, sit down with your team and map out a client experience plan.

This plan includes looking at the entire process, including intake, case management, and follow-ups. Identify what your firm should do to make your plan a reality, then begin implementing it immediately. As your team becomes more familiar with the system, you can adjust and refine it for optimal results.

Bonus tips:

- **Instead of focusing solely on the goal of having happier clients, focus on the system you use to accomplish that goal.**
- **Give your system three to six months to take root, then reassess your client satisfaction by looking at feedback and reviews.**

Chapter III

Streamline Your Firm's Communications to Improve Efficiency and Client Satisfaction

Communication might sound like a broad, complicated topic for law firms, but it doesn't need to be.

By looking at three essential types of law firm communications—internal, client, and third party—a clearer picture emerges of how essential communication is and, more importantly, steps you can take to improve it.

Get on the Same Page (And Stay There)

Internal communication within a law firm is one of the biggest pain points team members face.

Why does internal communication suffer? There are several reasons:

- **Information isn't centralized. Even if team members collect thorough data, it's inaccessible to other team members.**
- **Important messages don't reach their destination. A client's question or an approved records request is recorded by a team member, but the intended recipient never sees it.**
- **When time is scarce, important tasks get lost in the shuffle. A firm gets swamped by "urgent" matters, and less time sensitive but equally important tasks gather dust.**
- **Old, outdated processes refuse to die. Just like in any other field, legal professionals sometimes become comfortable doing things a certain way, even when those processes have outlived their utility or have been superseded by more efficient methods and tools.**

These challenges create even bigger problems in a law firm. They hurt productivity, motivation, and morale. They also increase the number of mistakes team members make, which can cause countless obstacles at your firm.

Five tips to fix these problems:

1. **Purge paper and go online. One of the biggest culprits causing roadblocks is the use of paper-based systems to communicate. Whether you're distributing a memo or relaying a phone message to a team member, always do so electronically. This provides a record of interactions, accountability, and accessibility.**
2. **Always confirm receipt. Create a policy of confirming when you receive a message from a team member. Even a simple email stating "got it" will suffice.**
3. **Encourage follow-ups. If confirmation of receipt isn't given, the person sending the message should follow up with the recipient until they get confirmation.**
4. **Cut out unnecessary communications. Sometimes less communication is more, especially in a busy personal injury law firm. Look for ways to eliminate unnecessary meetings, email chains, or other communications that distract team members from more important work.**
5. **Give all team members a voice. All team members, from managing partners to newly hired legal assistants, should have an anonymous platform to speak freely, whether that's about problems the firm is facing or suggestions for improved communication.**

Bonus tip:
Don't forget the human element of managing your team. Personal injury law firms can easily become overwhelmed with work, which is why offering a reprieve for all workers is essential. Create time in your workweek for socializing and team-building exercises. This will give everyone at your firm the chance to grow together and come back to their work refreshed and energized.

Stay Connected with Your Clients

Communicating effectively with your clients is the most important part of your law firm's services. The more attention you devote to client interactions, the more faith they'll have in your abilities.

To show clients you're on top of things, keep these five tips in mind:

1. **Always know a prospect's status. Prospects represent the future of your business, so it's vital you prioritize how your firm interacts with them. Make sure you and your team always know whether a prospect is considering your firm, completely disengaged, or somewhere in between. Then, you know where to place your resources.**
2. **Perfect your intake processes. The intake process provides your firm with valuable information from your client. It should be finely tuned and repeatable. Create brainstorming sessions with all your intake team members so you can discuss what works, what doesn't work, and how to make your intake better.**
3. **Never let a client's question gather dust. There's no such thing as a bad question, especially when it comes from your client. Create a policy to always return your client's calls within 24 hours, if not sooner.**
4. **Update clients frequently, even when there aren't updates. Clients hate feeling like they need to call a firm to get an update. Preempt them by giving them updates anytime you receive one. If there are no updates, simply touching base can alleviate their uncertainty about whether their case is receiving the attention it deserves.**
5. **Touch base with former clients. Your past clients will be some of your firm's best ambassadors. Check in with your former clients regularly to see how they're doing. When someone asks them if they know a good lawyer, you want to be the first name on their lips.**

Lead the Conversation with Third Parties

The more proactive you are with third parties (other attorneys, police departments, doctors, and insurance companies), the more effective you'll manage a case. In other words, reaching out is better than waiting for a response.

These tips will help you get what you need from third parties.

1. **Create a list of contact information for each case you're handling. Hopefully you have a centralized, easily accessible, online document or software you use to track each case. In that document, keep a list of all contacts you'll need to move things forward.**
2. **Get direct contact information when possible. If you always need to speak to an intermediary (a receptionist, call center, or secretary) when you reach out to a contact, consider asking your contact for a direct line of communication instead.**
3. **Devote an hour each day to check on outstanding requests. Instead of sporadically touching base with third parties throughout your day, set aside one hour to make calls or send emails.**
4. **Use different forms of communication. If you're a phone person, consider branching out to text, email, or whatever form of communication your contact is most responsive to.**
5. **When possible, automate. Many of the emails or reminders you send to third parties can be automated with the right software. The more you automate communications, the more time and energy you can devote to other parts of your practice.**

Bonus Chapter

Putting It All Together with Backdocket

Now that we've reviewed the many ways to improve how your firm operates, let's look at how backdocket can help.

Convert More Prospects

Our software makes it easy to not only track open cases, but also keeps all your prospects' information in one centralized location where everyone on your team can access it.

You can keep notes of your calls and set reminders to follow up with a prospect. Once you're on the phone with a prospect, you'll have all vital information about them on hand. You can then refine your process using that information, following up with prospects who show real interest in your services and letting go of prospects that have gone cold.

Improve Client Satisfaction

The creators of backdocket noticed the same obstacles repeatedly facing small- to mid-size firms. Disorganization, miscommunication, and overly complicated software made their jobs harder.

These law firms needed a practical, flexible, intuitive practice management software to help with all aspects of their practices—and there simply wasn't a tool that helped them meet their goals. Backdocket was designed to be that tool.

Backdocket helps you impress your clients by:

- **Empowering your team to be more proactive. Instead of waiting for a defendant's attorney, a doctor, or even your own client to move a case forward, you can set up alerts and access centralized information so that you're the one in control.**
- **Allowing your team to pick up conversations with clients where you left off. When you speak with clients, you can easily access notes that tell you what was discussed in the last call. Your client will appreciate this continuity and personalization.**
- **Using automation to free up your firm's bandwidth. By automating tasks that used to consume much of your day, you'll be free to focus on the most important aspects of your work.**

Law firms using backdocket are quick to tell us how much happier their clients are since the firms started using our software. Backdocket allows team members to always be moving cases forward. It reminds them when it's time to reach out to a client. It centralizes information for easy access, so your team can more easily convey to clients all the work you're doing for them.

Improve Communication

Backdocket dramatically improves how team members within a law firm communicate with each other. But our software's features enable firms to improve client relations and quickly move cases forward through third-party interactions.

- **Stay at the top of a prospect's mind - Backdocket helps you stay on top of prospects and their statuses, so you can be sure you're bringing in the cases you want. It reminds you and your staff when it's time to follow up and provides you information you'll need to have a productive and enjoyable conversation.**
- **Nail your firm's intake - Backdocket can prompt you to ask the right questions and keep that information in a centralized, easily accessible document for all team members to see.**
- **Save yourself time by relying on centralized information - Backdocket stores, locates, and auto-populates important contact information for all your ongoing cases. It will also let you know when it's time to call someone who is needed to move the case forward.**
- **Cultivate referral networks - With backdocket, you can easily stay in contact with referring law firms and the clients they send your way. This information lets you know which referrers are offering your firm valuable leads, so you can focus on the most crucial parts of your network.**

We also prioritize communication, which is why we always make ourselves available to our customers. It's our goal to ensure you understand how to use our software even before the first day you implement it at your firm, and we can adjust our platform to accommodate the way you want to work.

Conclusion

There are a couple themes you might have noticed throughout this guide. Communication and empathy are cornerstones of any service-based business, especially personal injury law firms.

Integrating healthier communication and greater empathy between your employees, as well as your firm and your clients, is fundamental to growth, sustainability, and reputation management. Though these are broad concepts, we hope we've provided several actionable tips that you can begin using immediately.

Our practice management software is a great way to improve communication to better serve clients. Implementing a practice management software also greatly improves how teammates help one another. We've built our software to be a practical, pliable tool that conforms to how a firm works, rather than forcing a firm into a new way of working.

Backdocket's goal is to help law firms do better work by eliminating inefficiencies and allowing them to focus on what really matters.

If you'd like to learn more about our practice management software, contact us for a free demonstration.

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