Step-By-Step Guide for Organizing Your Client Intake Proces

backdocket

Client intake is your firm's first impression, and as everyone knows, you only get one shot at those. The client intake process can be time-consuming for your firm and ultimately for your prospective clients. Making it easier for them makes it easier for your team.

At backdocket, we understand the value of a seamless intake process. We're glad to share ways to make this process run so smoothly that it becomes a game-changer for your firm and makes an excellent impression on everyone who reaches out to your firm for help.

Download our free PDF to learn steps to organize and elevate your client intake process.

STEP-BY-STEP GUIDE: HOW TO IMPROVE YOUR CLIENT INTAKE PROCESS

Client intake is where you make your firm's first impression. If you get this right, it's an instant trust-builder. If you get intake wrong, there's nothing your firm can do to that will bring in new clients and build back that trust.

In this guide, we'll explore how important it is to streamline your client intake process by giving you a step-by-step guide for refining your client intake. Get ready to impress while getting the types of cases you want.

STEP 1:

INTEGRATE WITH PRACTICE MANAGEMENT SOFTWARE

The way you structure your intake process is key. You want a process that is easy to repeat and measure. A great way to ensure your firm can do this easily is by using practice management software.

When implementing a practice management software like backdocket to solve your firm's organizational needs and improve intake, it's important that every team member understands the system. Each specialist and staff member should know that it's going to save them time, reduce worry, and allow them to do their job more efficiently. When intake data is all in one place and easy for everyone to access, its impossible for leads to slip through the cracks.

STEP 2:

MAKE SURE YOUR INTAKE TEAM IS ON THE SAME PAGE

Whether you already have an individual answering calls as an intake specialist, you hire team members who focus on intake, or you hire a third party, the rules of intake should apply.

Intake team members should first make a connection through empathy while knowing when it's appropriate to move into their script. It's critical that anyone answering these calls shows compassion while also getting the relevant information to assess the quality of the leads.

Even if the person calling doesn't become a client this time, making them feel listened to and cared for could make them a future client.

STEP 3:

MAKE SURE YOUR INTAKE TEAM HAS A SOLID SCRIPT

A solid script makes it easier for intake specialists to apply a compassionate touch to their communication. It's important that you create a script that your intake specialists can follow every single time to gather the information needed.

Some criteria are universal for most personal injury law firms. However, you may need to factor in specifics for a unique case type you want. Either way, make sure your team has the script AND understands what and why they're asking.

Also, be sure to revisit your script from time to time to see if it's helping your intake process or needs some tweaking.

STEP 4:

LEVERAGE AUTOMATION WHEN YOU CAN

Online forms are a great way to supplement your intake. Having a form available on your site can help qualify leads, saving your firm something priceless: time. This method for collecting information is automated and involves the same process for building a script.

And when your intake team is busy, automating quick follow-ups can be a great way to stay front of mind with your prospects without taking up too much of your team's time. Consider it a magical lead fairy at work while YOU work.

STEP 5:

DIVIDE INTAKE INTO STAGES

Intake is more than qualifying leads and attracting new clients.
It also involves:

- Gathering contact information
- Pre-screening
- Scheduling consultations
- Collecting important information
- Communicating a fee agreement and getting it signed
- And then there's onboarding

All of these stages are made easier with backdocket's customizable practice management software.

STEP 6:

KEEP TRACK OF LEADS

Another step that will help you organize your leads is to categorize them by relevance of their case to what your firm offers. Having your intake team note how likely the lead seems to want an attorney immediately and noting if their issue is at all related to the case types your firm handles will be helpful. From low probability to high, your team can classify leads based on their willingness to hire your firm.

Once you know it's likely certain leads will convert to a client, you can stay closely connected to those prospects. The leads that you categorize as a higher priority can become a focus for your intake team—with the goal of communicating these leads toward a free consultation.

STEP 7:

USE RESULTS TO REFINE THE PROCESS

Measuring your results so you can best refine your intake process is one of the most important steps. Tracking results like which marketing channels garnered the most leads and what percentage of your firm's calls or forms lead to conversion can assist you in refining your process. If you notice that certain marketing channels work better than others, you can duplicate that success and learn where there are potential problems in other channels.

LET BACKDOCKET HELP IMPROVE YOUR INTAKE

Backdocket is here to help small- to mid-size law firms streamline every aspect of their business. Being able to easily create a database of prospects, track their leads, and follow up in person or through automated processes puts your firm in a strong position to grow.

Let us show you how to get the most out of your intake process and make impressions that consistently lead to new clients. Reach out to see how backdocket can help through a free demonstration today.

STREAMLINED SCHEDULING

With individual and centralized calendars synced on cloud-based software, it's easy to set appointments and schedule the resources you need. Improved to-do lists allow easy task monitoring and automated addition of tasks to daily lists.

Practice management software like backdocket also integrates seamlessly with Google and Office 365, so your firm can keep track of the schedule anywhere. This feature eliminates frustrating scheduling issues that can drive away quality talent.

SIMPLIFY YOUR FIRM'S WORKFLOW WITH BACKDOCKET

At backdocket, we've built an efficient practice management software to help small- to mid-size firms improve their workflow and retain talented legal staff. With the help of our cloud-based software, your firm's workflow will become smoother and faster than ever, helping you attract top candidates to your firm.

CONTACT US TODAY FOR A FREE DEMONSTRATION.

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