

A man and a woman are sitting at a desk in an office, looking at a laptop. The man is on the left, wearing a light blue shirt, and the woman is on the right, wearing a brown top. They are both smiling and appear to be in a collaborative work environment. The background shows office furniture and a window with a grid pattern.

Lead Management Best Practices: How to Turn Leads into Clients

 backdocket

Your marketing efforts plant the seeds of success and nurture leads into cases. To protect your marketing investment, your team needs a plan for how to manage and grow your leads. Otherwise, you're throwing your money away.

In this guide, we'll explore how important streamlining your lead management is and share what your firm needs to improve your lead management processes.

QUICK COMMUNICATION

Within minutes of receiving a lead, your team should be in contact with them. Being responsive from the get-go is the first step toward building trust and will improve the chances that a lead converts to a client.

Besides, your lead could move on quickly to another firm that follows up with a swift response. Don't lose prospective clients because there's a communication lag in your process. Get in touch with them promptly to establish a relationship.





GOOD LEAD MANAGEMENT REQUIRES GOOD INTAKE

Good intake is foundational to understanding your leads and your relationships with your clients. When your intake is on point, it elevates your firm's efficiency.

Getting all the information you need from a lead will save you time and allow you to effectively categorize it. Practice management software like backdocket can help you ask the right questions at the right time and centralize that information for everyone on your team to always see throughout the life cycle of that lead. This is your firm's first impression and may be the only opportunity to connect, so making sure the process is smooth and professional will instill trust in your firm in a powerful way.

TRACK ALL LEADS

For every marketing campaign your firm launches, it's important to keep track of your lead sources to understand where they originate. For example, during the intake phone call, your intake specialist may ask a lead how they heard about your firm. The answer will help you make more informed marketing decisions in the future.

Another example might be a lead who found your firm's name on a social platform like Facebook or Twitter. This could prompt your firm to develop a social media strategy using those specific platforms to increase brand awareness and attract more clients.

Backdocket's practice management software lets you monitor the status of all your leads and see which sources brought them to your way.





USE EMAIL MARKETING TO ENGAGE LEADS

Email marketing can keep your firm front of mind for a lead so they remember your firm should they or a family member ever need a lawyer. Email marketing can nurture these leads and help you maintain a connection. A practice management software platform like backdocket integrates with email marketing platforms to help you target these prospects and keep your firm on their radar.

EASY ACCESS TO LEAD INFORMATION IS A MUST

Every time you contact a lead (whether it's for the first time or in a series of e-newsletters), it's an opportunity to make a meaningful connection.

When everyone at your firm can access detailed notes and tracking reports about everything from intake to conversion, it's a gamechanger. Centralizing data around ALL leads can help make each interaction an opportunity to show them you're organized, knowledgeable, and listening to them. With backdocket, you can centralize and customize all lead and client information so that nothing and no one falls through the cracks.





REMIND YOUR TEAM THAT EVERYBODY WINS WITH GOOD LEAD MANAGEMENT

When implementing a practice management software to solve your firm's lead management needs, it's important that every team member understands and is trained on the system you choose.

Being on the same page from intake to flourishing case will save your firm time and allow everyone to focus on their clients' needs instead of scrambling to find information or ask questions that the client already answered. Everybody wins when leads are managed properly. Your staff thrives and so do the relationships you have with everyone who makes contact with your firm.

LET BACKDOCKET IMPROVE YOUR LEAD MANAGEMENT PROCESS

At backdocket, we make managing and converting prospects easy. We help streamline communication internally and externally. And we help you monitor which marketing efforts generate the most conversions and integrate them into your marketing efforts.

If you're looking for a lead management system to help your firm grow and succeed, contact us today for a free demonstration of backdocket.





**CONTACT US TODAY FOR A FREE
DEMONSTRATION.**

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