

Identifying and Resolving Client Intake Challenges at Law Firms

Obtaining clients is integral to the growth and success of any law firm. While many firms have a system in place to acquire new clients, technology has changed dramatically over the last decade and more efficient client intake methods are available.

Although handling cases is an attorney's primary task, the firm must be able to successfully interact with potential clients, assess their needs, and discern if they have a case worth pursuing. Developing an effective client intake process enables a firm to obtain accurate client information, store the data securely, and accept and prioritize cases. However, client intake presents some significant challenges.

Client data acquisition and storage

One of the biggest client intake challenges is data acquisition and storage. When a new client contacts a firm, what happens to his or her call? How is it handled? What information is taken down? Where is that information recorded and stored?

Some firms use a basic system to achieve these tasks — a paralegal answers the phone, jots down information on a sticky note, and moves along to the next client. While sufficient for a small number of leads, as a firm's client list grows, this type of manual intake system can cause disorder — and potential clients may be lost.

Other firms use outdated case management software with limited data storage, reporting, and communication capabilities that hinder rather than enhance the intake process.

Let's take a look at some of the issues in obtaining and storing data:

- **Who acquires the data?** — One of the first steps in creating a straightforward intake process is to delegate a staff member or team to acquire new client data. When a firm fails to do so, numerous firm members may take client calls and information may become lost or intermingled with other cases.
- **What is the template for obtaining client data?** — What client information is important and what is irrelevant? Firms that fail to use a well-designed template for obtaining client data may fail to record important case notes.
- **Where is the data stored?** — Is data stored on a legal pad, a hard-drive, or the cloud? Today, law firms cannot afford to have data scrambled about on different drives and notepads. To ensure a streamlined intake process, all client data should be stored in a secure location that is accessible both locally and remotely to every authorized team member.
- **Who has access to the data?** — Client data is sensitive and must be properly secured. The information acquired should be organized and accessible to all authorized team members.

- **Are there security concerns?** — Today, hacking is rampant in all industries. Law firms must take the necessary steps to identify and remedy security threats and weaknesses that may compromise client data. Information stored on any device — desktops, laptops, smartphones, tablets, etc., — is vulnerable and thus a comprehensive data security program should be implemented. Client data is the lifeblood of law firms. Proper data recording is the key to assessing leads and appropriately responding to potential clients.

Communication issues

Another client intake challenge is flawed or insufficient communication with a potential client. In many cases, a law firm has one opportunity — the initial consultation — to determine a client's needs and explain how the firm can help. A number of communication issues can adversely affect the intake process:

- **Emotional insensitivity** — One key to signing a new client is gaining their trust. If a law firm fails to empathize with a client's situation, that client may not share the details of a potentially lucrative case. Most likely, the client will choose to enlist the services of a different firm.
- **Poor listening** — A law firm must be willing to listen to a client's story without interruption. Constant distractions and disruptions send a message that the client is not important, which erodes the client/attorney bond and decreases the chances of client acquisition.
- **Poor correspondence etiquette** — Whether a paralegal or legal secretary answers the phone or responds to client emails, that person should be well-trained and maintain a positive, professional demeanor while interacting with clients.
- **Confirming a client's ability to pay without offending the client** — When taking new, non-contingency cases, a law firm must be wary of clients who cannot afford legal services. However, for many firms, confirming if a client has the ability to pay without offending them is a tricky task, and can result in lost business.

Prioritizing clients

As leads start to come in, a law firm must prioritize clients. Converting leads to clients and cases requires an organized ranking, tracking, and communication system. Without such a system in place, firms may run into two major issues:

- **Not knowing whom to call and when** — When a law firm takes down potential client information on sticky notes and other unreliable forms of media, knowing whom to call and when swiftly grows confusing. If a firm does not have a prioritized list of clients, how will they know which cases are worth their time? By failing to promptly contact clients, firms may wind up missing out on opportunities.
- **Failing to identify if a client has a case** — Paralegals and secretaries need to record detailed notes about clients, including whether they even have a case. A prioritized list of potential clients and cases enables a firm to determine which cases are worthwhile investments of time and resources.

When client volume increases, firms may have difficulty prioritizing cases. An organized, systematic process can reduce confusion and increase productivity.

Advertising costs

Most lawyers would agree that a budget needs to be set aside for advertising. However, there also needs to be a balance between advertising costs and resources spent directly on the client intake process.

A bloated advertising campaign may appear to generate exposure, but unless it is converting a steady stream of leads into clients, it is an unnecessary expense that can actually damage a firm's ability to drum up new business. By adopting a strict client intake qualification process, law firms can ensure their advertising budget successfully targets as many quality leads as possible.

Maintaining client provided files

In certain areas of law, clients may submit their own files pertinent to their cases. Depending on the practice area, this may include financial records, estate records, accident reports, photos, journals — anything they feel is important to their legal matter. All physical or digital material must be properly organized and stored.

Law firms that improperly handle client-provided files may lose information, mix files up, or intermingle cases. Ideally, any client-provided information should be stored with that client's notes, contact information, and other case data.

Navigating conflict searches

Before a client is signed and a case is approved, a law firm must generate a conflict report which must be passed back to the partner for final review and approval. In order to conduct a comprehensive and sound conflict search, a firm must have a detailed client database. The list should contain all pertinent information about the clients, their needs, how their case was resolved, and any foreseeable conflicts.

If a firm fails to keep organized client records, navigating client searches wastes time and money. Ultimately, by creating a carefully constructed client list, law firms can ensure that data searches regarding conflicts of interest or other information are efficiently conducted.

Streamlining the intake process

Law firms require an efficient, straightforward system for recording, storing, accessing, and searching client information. An effective intake process has the following characteristics:

- **New intakes remain separate** — When a person calls the firm, a new intake is created and the client's demographic data is stored alongside important firm information. If that same person calls the firm regarding another legal issue later in time, another intake is created for that case. Each case should be a new intake. This helps a firm identify new and existing clients, review their legal history, and assess their needs.
- **Questionnaires that reveal vital information** — By using a questionnaire, firms can screen clients and quickly obtain important information regarding their case. The

questionnaire also unveils if the client actually has grounds for a case, or if the case is worth the firm's time. For example, if a car accident client contacts the firm, the questionnaire will reveal what happened in the accident, who was involved, who was at fault, and what type of injuries were sustained. If there was an accident, but no injury, the case will be turned down.

- **Case prioritization** — A qualifying engine can help law firms prioritize clients based on screening criteria. This allows a firm to focus their energy on high value cases, and identify cases that are worth pursuing.
- **Secure document storage** — Law firms should store case documents on the cloud so authorized team members can remotely log in and review or work on cases.
- **Centralized and organized case information**— Ideally, firms should be able to log notes from client calls, and keep everything in one place for easy access.

The Litify Intakes solution

Litify Intakes provides a seamless, straightforward experience for law firms seeking to improve their current client intake process. While your firm may already have a client intake system in place, it may be outdated or inefficient. Litify simplifies the intake process, allowing you to maximize the number of leads you generate and convert into clients.

Our intelligent questionnaires help you to gather the key information your attorneys need, and set qualification criteria that helps you sign up high-quality leads faster. Once a lead becomes a client, you can track your stored interaction history as well as upcoming important events. You can even schedule and make client phone calls directly from the Litify app.

Litify Intakes was designed with the specific purpose of harnessing the power of today's technology to assist law firms in conducting better business. You won't have to wonder if valuable clients are slipping through the cracks in your screening. And you can rest easy knowing that your advertising budget is being spent on an intake process that focuses on getting results. Litify Intakes enhances your intake process and increases overall productivity — and profit — at your firm. Contact us today for more information.