



Law Firm Intake and Marketing Automation

QUICK START GUIDE

Automate menial tasks with the click of a button, turning your attention towards billable work

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(888) 646-5071

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If there's one thing most lawyers can agree on, it's that there's always more to do than there is time to do it. It's easy to find yourself drowning in work, putting in unreasonably long hours, many of them unbilled. Although non-billable hours are a part of life in any law firm, it's in your best interest to figure out a way to spend more time on tasks that bring in revenue and less time on non-billable tasks.

The great news is that it's possible thanks to automation. The secret to success for efficient lawyers is knowing the importance of using technology to their advantage. Law office automation helps streamline tedious tasks so you can focus your energy on the to-do's in your practice that matter most. No more wasting productive hours on menial tasks like scanning and printing or chasing down clients. Now you can automate those tasks with the click of a button, turning your attention towards billable work.

Why Automate?

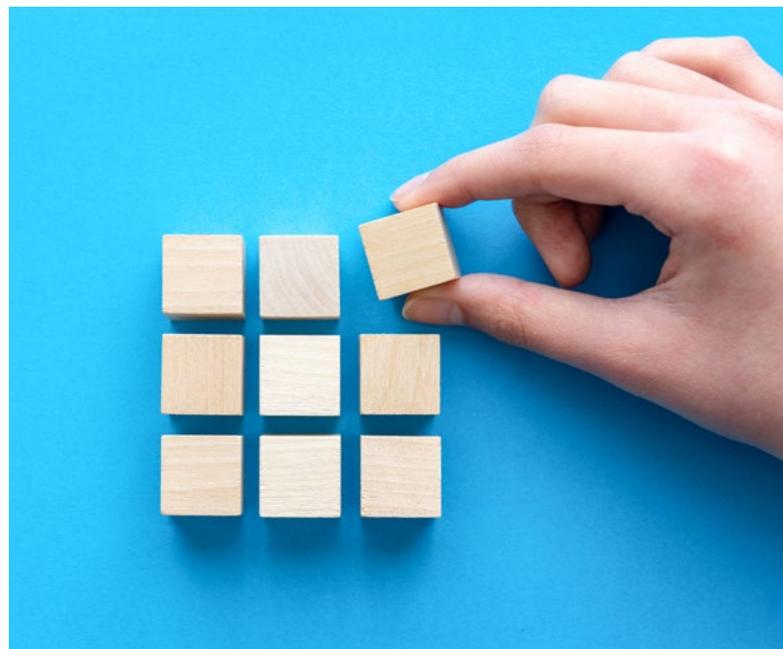
One of the most common hesitations about automation is that it strips away the human element of client interaction. However, automation doesn't replace human work; it upgrades it. Think of current automation technology as a way to make law firms more productive and profitable than ever by giving your practice an extra set of hands to automate, track and manage clients. Your skills and expertise are better made for handling billable work while automation takes care of the rest.

Automating your law firm means:

- Less Room For Error
- More Leads Converted Into Clients
- Lower Overhead Costs
- Improved Communication
- Improved Client Experience
- Increased Revenue

Law Firm Automation Overview

At first glance, automating your law firm may seem like a monumental transition. The truth is, it's a much easier evolution than you might think. If you do it right, it won't just make your processes go faster, but in many instances, it will give you the ability to manage and execute tasks that would have otherwise been impossible.



Automate Your Client Intake Process

The client intake process is unarguably the most critical part of building a relationship with your client since it's your "make it or break it" moment to make a good impression. It can be a time-consuming process since there's so much to gather from an interested lead. An example of a legal client intake tool is Lawmatics. This software makes it possible to collect information from potential clients through an online form, which then syncs it automatically into your database. No hassling with back-and-forths or bothering with tedious data entry.

- 1 **Customize your online forms** tailored to the specifics of the case
- 2 **Eliminate unnecessary fields**, easily controlling your clients' experience by only asking the relevant questions — ultimately saving everyone time
- 3 **Engage with your law firm** through your website and even set up a consultation, all using automation

Set Up Automatic Follow-Up Emails

Whenever a lead reaches out to your law firm, it's essential that they feel acknowledged.

- 1 Automate emails and make it easy to follow up with your client with a friendly greeting and sharing information about your law firm. Since most leads are likely not familiar with all of the services you offer, automated emails are a useful way to familiarize people with what you specialize in.
- 2 Add additional information such as links to your social network channels, whitepapers, and your contact information so that leads can get in touch when they need.

Automate Consultations

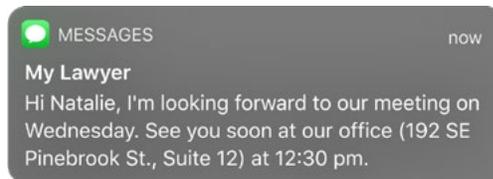
Between your schedule and your clients', finding a time to book an appointment that works for everyone can be a challenge. Rather than spending time on unnecessary back and forth emails and calls, automation books your appointments for you.

- 1 Send clients a link to your schedule where they can choose their appointment time based on your availability.
- 2 Link to your Outlook or Google calendar, and your potential clients will only see the time slots you choose them to see.

No more time lost on laborious administrative tasks like scheduling consultations. Automation schedules your appointments for you while you spend your time on billable work.

Send Automatic Meeting Reminders

All it takes is one client forgetting a meeting or showing up late to throw your busy day for a loop. Automation keeps everyone on schedule by sending emails and text messages with meeting reminders. Set up automatic reminders so you don't have to worry about losing valuable time on client no-shows.



Configure Document Automation

Most lawyers can probably agree that one of the most time-consuming yet necessary parts of running a practice is drawing up legal forms. Why not automate it? Spend less time writing up complex legal forms and instead build dynamic smart forms for faster and document creation. Instead of documents taking days to create, automation makes it possible to draft them up in minutes.

- 1 Automate documents and save your firm time, which equals money.
- 2 Use the drag and drop custom form builder to design a tailored document for whatever your firm needs. The totally automated and customized customer experience won't just make your clients happy but you'll also reduce inefficiencies and errors.

Program Follow-Up Campaigns

Increase the effectiveness of your marketing efforts by automating follow up campaigns to engage clients even further. Instead of letting your contacts go dark, automated email campaigns nurture your relationship with your clients and leads and reinforce trust.

- 1 Send customizable campaigns to give your clients and leads reassurance that you're still valuable and trustworthy.
- 2 Send special offers or valuable content to remind them that there are benefits to working with your firm.

Strengthen Client Relationships Through Automation

Automation software like [Lawmatics](#) makes it easy to track and manage all of your clients through a systematic and hassle-free approach. Rather than dealing with multiple systems to manage your leads, you can automate everything in one single program.

Making the switch to automation means boosting your client intake process, streamlining your workflows, and ultimately improving your success rate with clients old and new.



To learn more about how Lawmatics can help you make the vision for your firm come to life, contact us at:

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