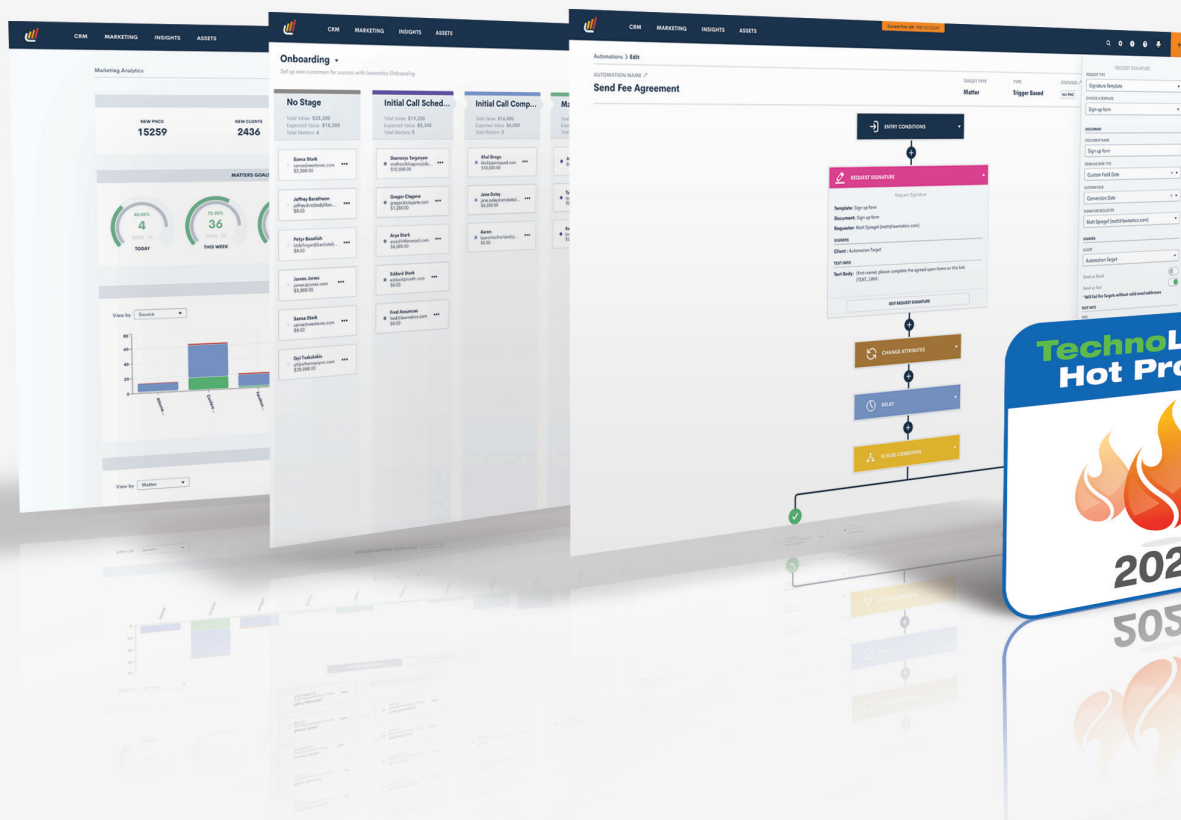


# Grow Your Firm by Automating Your Marketing, Client Intake, and More With Lawmatics

By Neil J. Squillante  
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Lawmatics is client relationship management (CRM) software for law firms that automates your marketing, lead management, client intake, client reengagement, timekeeping, and billing.

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Savvy legal consumers hire lawyers, not law firms. As a result, the most experienced and talented lawyers in a firm often find it difficult to schedule time for client development activities. If you have work that you cannot assign to others, consider an alternative solution that [Lawmatics](#) now makes possible — automating your marketing and client intake.

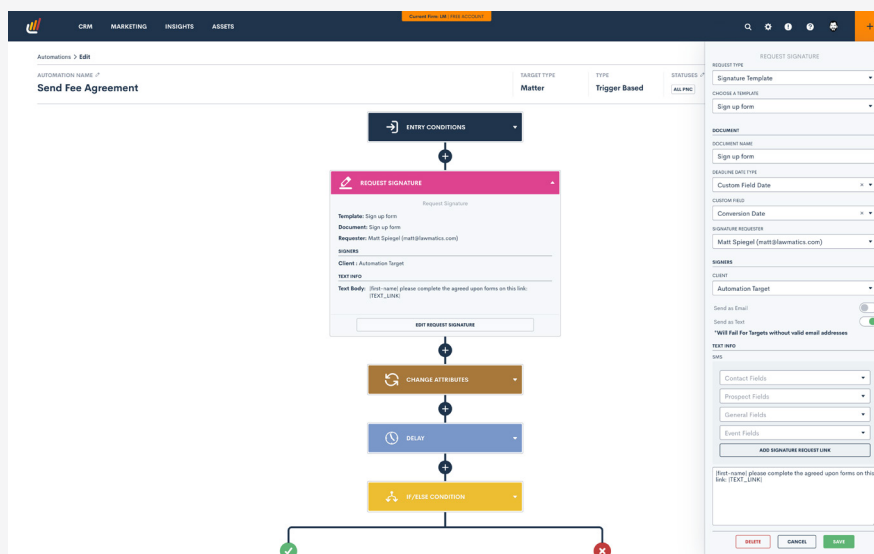
## The Killer Feature

When most legal professionals hear about automation, they think about document assembly. Lawmatics includes document assembly (more on this below) but also automates tasks that law firms never consider automating — like emailing each client a birthday greeting. Lawmatics also automates multistep workflows like running a conflict check, scheduling a consultation if no

conflict exists, and if the consultation goes well emailing a retainer agreement for e-signature and trust account invoice.

You can build an unlimited number of automations in Lawmatics, each of which starts with one or more triggers. Triggers include events, completing a task, a form submission from your website, receiving or sending an email message, requesting files, and various client actions such as signing a document or paying an invoice.

The triggers you create have corresponding actions, including sending email or text messages, creating appointments or tasks, requesting an appointment or signature, running a conflict check, generating an invoice, sending client portal invitations, and much more. You can even convert a prospective case into a matter and sync client data with your practice management system if you use one.



Lawmatics automates marketing and client intake tasks such as sending a fee agreement for e-signature as shown in this example.

Built-in tools for [booking appointments](#), [client portal](#), [e-signatures](#), [file requests](#) (e.g., medical records), and [online payments](#) eliminate the need for third-party products in the automations you create.

You're probably formulating ideas as you read this litany of capabilities. Conti Moore Smith, managing partner of Conti Moore Law, PLLC, has placed Lawmatics at the center of her five-lawyer firm in Orlando, Florida. "Lawmatics saves you so much time that you're losing money by not automating with Lawmatics," says Smith.



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"Today's consumer expects a seamless user experience with instant gratification, and the same applies for legal services," says Matt Spiegel, Lawmatics CEO. "We give lawyers the practice automation technology they need to deliver immediate, personalized engagement from the moment a potential client reaches out through the end of their case and beyond."

## Other Notable Features

Automation permeates other functions in Lawmatics. The [Document Builder](#) generates documents in Word or PDF format using custom data fields. You can also import PDF forms. Similarly, email templates enable you to send personalized [drip campaigns](#) to prospects. If you

publish an email newsletter, you can send slightly different versions using audience segmentation tools. Lawmatics can send these messages from your own address if you use Google or Microsoft for email services.

The data for these automation tools comes from the [CRM](#) at the heart of Lawmatics, which supports unlimited custom fields. From the CRM, you can communicate with contacts via email or text messages, see a timeline of all activity for each contact, create, assign, and manage tasks, and run conflict searches. The CRM tracks each opportunity on the [Pipeline](#), a specialized Kanban board that mirrors the stages of your sales process.

Lawmatics provides insights on your firm's performance. Set [goals](#) and track progress, use the tracking pixel to identify your best source of leads, and create custom reports for anything you want to measure.

## What Else Should You Know?

Lawmatics integrates with popular practice management systems. However, many law firms prefer using only Lawmatics and requested the addition of billing tools. Accordingly, Lawmatics now includes [time and expense tracking](#), timekeeper rates, invoice design tools, bulk invoice delivery, balance forward statements, and trust accounting.





## Meet Neil J. Squillante

Neil J. Squillante is the founder and publisher of [TechnoLawyer](#), an award-winning network of free email newsletters for lawyers and law office administrators. Many consider TechnoLawyer newsletters the only ones they need. A Fastcase 50 award winner, Neil has a long track record of inventing successful advertising and publishing technologies and related best practices. Previously, Neil practiced commercial litigation at Am Law 100 firm Willkie Farr & Gallagher. He received his J.D. from UCLA School of Law and his B.A. from Duke University. At UCLA, Neil served as a Managing Editor of UCLA Law Review.



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See how Lawmatics saves you time, improves client satisfaction, and increases revenue by automating your marketing, client intake, billing, and more.

**GET FREE DEMO »**

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