



CASE STUDY

Complete Visibility

Why estate and elder law attorney,
Bill Miller, chose Lawmatics as the
intake, CRM, and automation system
to manage marketing for his firm

CLIENT**Bill Miller, Esq.**

Miller Estate and Elder Law

**PROFILE**Solo Attorney
in Anniston, AL**RESULT**

Unified lead management, automated lead follow-up, and powerful reporting insights were achieved.

Streamline for Success

When Attorney Bill Miller was introduced to Lawmatics, he had been using a combination of tools. At that time, Lexicata¹ was used for his lead management, and Mailchimp was used for email campaigns. With limited visibility into the success of his marketing efforts, Bill was searching for a solution that would allow him to execute the delivery of lead magnets and track conversion through the entire marketing and sales funnel.

¹ now Clio Grow

"I was frustrated by our inability to track how people found us right from the beginning. We produce a significant amount of content; using separate systems to manage lead magnets, email delivery, and follow-up campaigns became a taxing process."

When marketing processes are executed in disparate technology programs, it is nearly impossible to determine the success of any campaign or content piece due to the lack of information tracking from one system to another. While other CRM solutions give law firms the ability to track and manage leads, they lack the reporting and automation features necessary to measure conversion at every stage due to the required integration with other systems.

Strategy Meets Execution

By implementing Lawmatics, Bill was able to eliminate multiple pieces of technology and streamline his marketing funnel in one easy-to-manage platform.

"We create a lot of lead magnets. With Lawmatics, we can track a lead from the very first time they engage with our firm. Now, we can see their entire journey step by step, and we can identify the sources that are working the best and those that are underperforming. I am really happy with the tracking and reporting features because we finally have the ability to measure success and our overall conversion rates."

Miller Estate and Elder Law chiefly uses Lawmatics to capture, track, and measure their marketing efforts. These efforts include forms, automated emails, nurture campaigns, source tracking, and reports. When the team implemented Lawmatics, they worked hand-in-hand with their onboarding manager to migrate from their old systems and segment their contacts.

"I love the sophistication of the platform. Lawmatics enables us to segment leads based on which piece of content they interacted with or by source. Because of the ability to automate that process, we no longer have to manually manage lists. Now, we can segment by practice area, case type, and any other filter we choose to create. That is an ability that would otherwise be impossible."

Playing the Long Game

You don't necessarily need more leads. You do need more clients. Many law firms and the marketing partners they work with are solely focused on generating new inquiries. Without a unified system to track, manage, and automate the follow-up process, the result is what we like to call "marketing waste." A lack of follow-up with leads generated, broken processes, or the use of systems that don't fully integrate leads results in one or more of the following outcomes: low conversion rates, higher marketing costs, or an overall decrease in marketing ROI and annual revenue.

"Lawyers and law firms spend a lot of time generating new leads. If a prospect does not hire the firm right away, they give up. For us, we put a lot of effort into creating great content that engages our website visitors. Then, we turn our attention to finding the gaps in our lead follow-up campaigns and to analyzing the results. As a result, our marketing dollars go much farther because we are converting clients well after they first meet us — which could be months or even years later."

In Summary

Now that Bill and his team have a platform that can automate, track, and manage the lead follow-up process, they are able to increase the overall effectiveness of their marketing efforts. By eliminating multiple systems, true visibility and accurate reporting were achieved for all channels. Additional capabilities such as list segmentation and automated follow-up campaigns have provided Miller Estate and Elder Law the opportunity to create a personalized experience and a trackable journey for every prospect that engages with the firm. Overall, that improves the client experience and creates an incredibly professional image in the eyes of the reader.

"I highly recommend and endorse Lawmatics. If you are looking for a software to manage leads, it is the best one I've seen on the market. Their customer service and support are excellent. Take the time to learn the system and set it up because it's well worth the effort."

To learn more about Lawmatics and schedule a personalized demo, please [visit us here](#)¹.

¹ lawmatics.com/contact



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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