AUTOMATIONS TO HELP YOU RUN A HIGHLY PRODUCTIVE, PROFESSIONAL, AND PROFITABLE LAW FIRM

Deck link: http://bit.ly/Automations_DCBAR

INTRODUCTION

I’m Maddy Martin

Head of growth & education for Smith.ai, a virtual receptionist service for live calls & web chat.

We’ve handled over 1,000,000 calls, mostly for solo & small-firm U.S. attorneys.

https://smith.ai

GOALS & OBJECTIVES

Here's what you're going to learn.

LEARNING GOALS

1. **Identify** distractions & time-consuming tasks
2. **Understand** communications systems that help you manage the business side of running a law firm or solo practice:
    a. Phone systems
    b. Call handling & virtual receptionists
    c. Email
    d. Text messaging
    e. Web chat
3. **The basics**: How to start using these systems
4. **Advanced techniques**: How to maximize the impact of these systems
5. **Your game plan**: Reduce distractions & time-consuming tasks

WHAT YOU WILL LEARN

1. Route inbound phone & email communications
2. Limit calls & emails with web chat & texting apps
3. Automate lead capture & qualification
4. Hand-off new client intake
5. Streamline appointment scheduling & reminders
6. Integrate payment collection into workflows
7. Systematically refer "bad" leads

Plus: Integrate your communications into your existing systems, like CRM, calendar, billing, email, marketing automation & more.

WHO **CARES?**

You should, according to the

2017-2019 Clio Legal Trends Reports

ARE YOU LAWYERING OR LABORING?

2.5 hours
The average time an attorney spends on billable work per day.

2.9 hours
The average time spent each day on admin tasks.

1.2 hours
Of those 2.9 hours, the top 3 tasks are office administration (16%), invoicing (15%), and configuring technology (11%).

2 hours
33% of 6 hours/day not spent on billable work goes toward business development, indicating the importance of generating new clients.

ARE YOU LAWYERING OR LABORING?

23 minutes

How long it takes to recover from an interruption. Attorneys are interrupted ~6/day, so that's a ~2-hour loss per day.

2 out of 3 potential clients

Folks who say their "decision to hire" is most influenced by an attorney's responsiveness to their first call or email.

59 percent

People, on average, who didn't hire an attorney even after a consult.

86 percent

The average amount of attorneys' earnings that is *ever* collected.

WHAT THIS MEANS

Dilemma 1:

- Interruptions kill your productivity. **You want to <u>minimize</u> interruptions.**

- Potential clients demand quick response times. **You want to <u>maximize</u> responsiveness.**

WHAT THIS MEANS

Dilemma 2:

- Invoicing & chasing down late payments drain your time. **You want to <u>minimize</u> time-consuming billing tasks.**

- You need (and deserve) to get paid. And not after a collections agency takes a 30-50% cut. **You want to <u>maximize</u> revenue.**

WHAT THIS MEANS

Dilemma 3:

- Technology (software & services) makes you more efficient. It's particularly important for solo/small-firm attorneys. **You want to automate & sync tasks, processes & data.**

- In a small practice, you have no/limited IT or admin support. You can't spend all day learning & configuring technology. **You want simple, intelligent tools.**

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WHAT THIS MEANS

Dilemma 4:

- Having more control over your practice is one of the top reasons you're in a solo/small firm. Control relates to: methods, schedule, practice area, etc. — but also work/life balance. **You want to <u>maximize</u> your control of your work/life balance.**

- Balancing work and life means creating a plan for sustainable growth. **You want to <u>create & maintain</u> boundaries.**

WHAT THIS **MEANS**

The result? Interruptions <u>to</u> you & <u>by</u> you.

- New leads
- Existing clients
- Court staff/judges (priority interruption)
- Opposing counsel & staff
- Referral partners, vendors, etc.

Interruptions come via:

- Phone
- Email
- Text
- Web chat
- 3rd party sites: Facebook, listing sites (Avvo, SuperLawyers, Google)
- *<u>PLUS</u>:*
  - ***Tasks that could be automated*** *(scheduling, reminders), e.g. manually logging time, documents, and other data-entry or similar chores.*

WHAT YOU CAN DO

Solution to these dilemmas:

- Adopt **cost-effective & efficient systems** for:
  - Routing & tracking communications
  - Filtering leads
  - Scheduling consults, call-backs & appointments
  - Intake
  - Payments

WHAT YOU CAN DO

These systems must:

- Be **affordable** (without commitment)
- Be **customizable** (at the start & ongoing)
- Be **easy** to use & monitor
- Be **comprehensive** (multiple comm. channels within one provider: fewer bills, less management)
- **Integrate** with your processes, systems & software
- If human, have reasonable **discretion** (as someone in-house would)

Understanding how potential clients are handled

It's not all on your shoulders! Potential clients can be handled by in-house staff, and/or:

- **Remote/virtual services**:
  - Paralegals
  - Bookkeepers
  - Receptionists
- **Software**:
  - Call routing & tracking
  - CRM / client intake / marketing automation software
  - Case / practice management software
  - Calendaring software
  - Payment / billing software

PUTTING IT TOGETHER:

Human intelligence +
machine intelligence

High responsiveness without interruption comes down to **form + function**

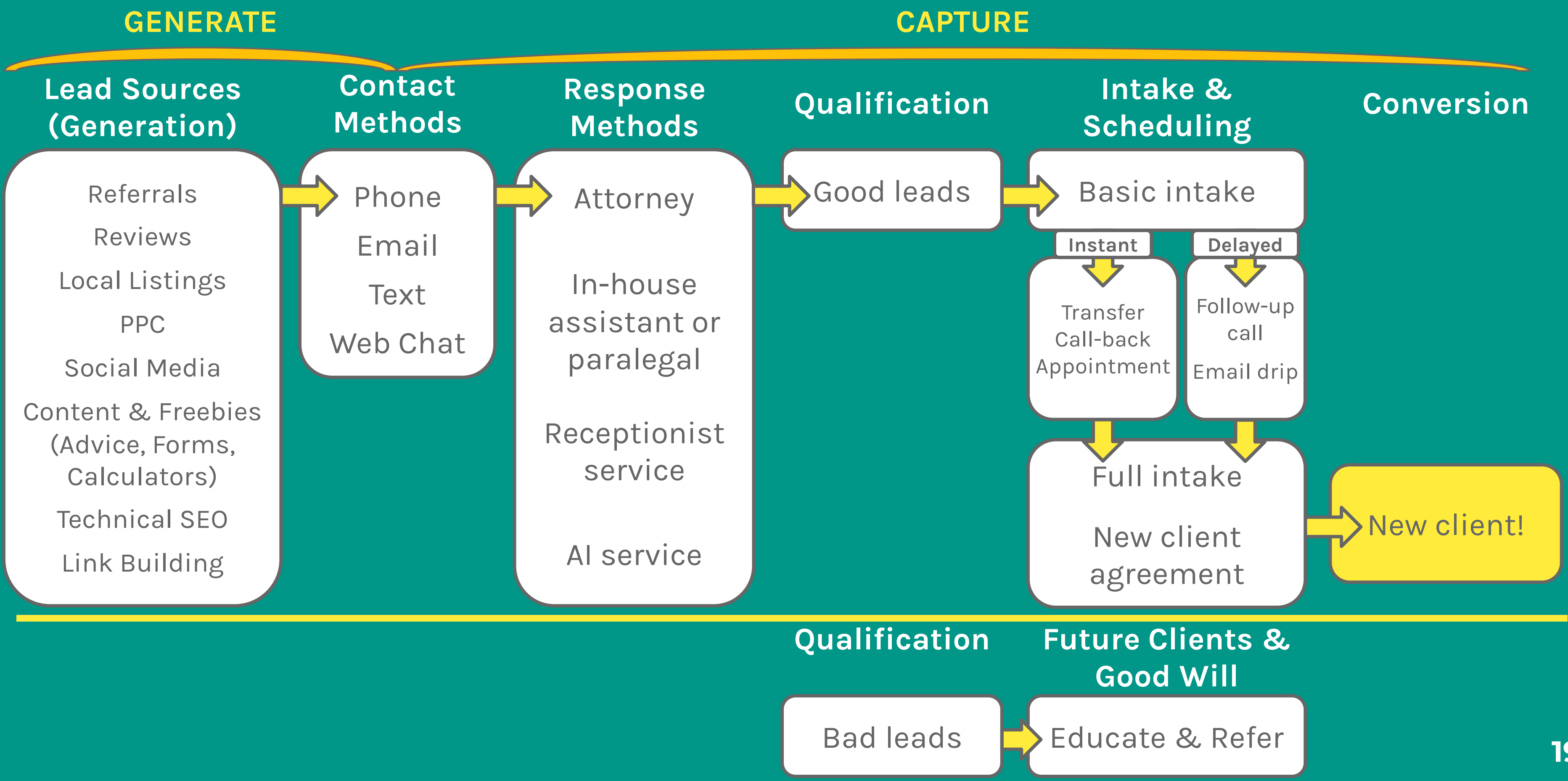
- **Human intelligence**
  - Lead-qualifying questions & intake-form composition
  - Caller greeting
  - Email content (from appointment confirmations to lead conversion drips)
  - How bad leads are handled

- **Machine intelligence**
  - Where is intake form hosted?
  - How are leads & clients recorded & tracked?
  - What happens after intake?
  - What happens if lead doesn't convert?

Combined effectively, you will achieve fast, friendly & accurate responses, which leads to qualified leads & a better experience for new clients (read: they're happier).

Set up systems & processes now, so your <u>future self</u> enjoys reduced interruptions.

LEAD CONVERSION FLOW



Step 1: Route inbound phone & email communications

- **Greeting & menu:** Establish a professional greeting and menu
- **Routing:** time of day, holiday, vacation & schedule adjustments
- **Blasts & sequences**
  - Overflow call handling
- **After-hours voicemail**
- **Office directory** (partners, associates, paralegals, assistants, remote staff & outsourced teams)
- **Call & text from any device**
  - Mobile phone, VOIP desk phone, computer, tablet
  - SIP softphone on computer to reduce unproductive “toggling”
- **Contacts** (common callers & current clients)
- **Block spam & unsolicited sales calls**
- **VIP (direct-transfer) & blocked-caller lists**
- **Marketing performance tracking**
  - Where did the call originate from, and did the source yield quality leads?
- **Business monitoring & metrics**
  - Know answered calls & missed, the number of rings, duration, and more.
  - Call recording: for record keeping, performance monitoring

Step 1: Route inbound phone & email communications

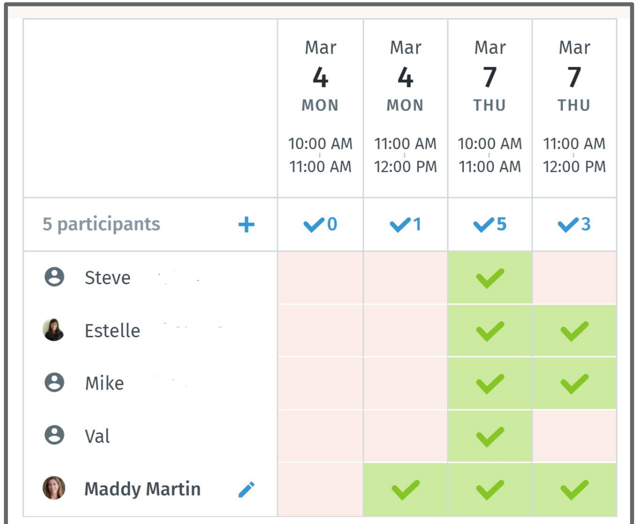
Potential Issues & Common Complaints

- **Phone systems**
  - Ring delays (latency)
  - No tracking or analytics (how will you track marketing ROI?)
- **Routing & tracking services**
  - Click-to-call (limits usefulness)
- **Receptionists**
  - Limited impact (answer/transfer/message vs. workflows & integrations — consider time-to-conversion impact)
  - Poor or inconsistent adherence to directions; inaccuracy
  - Lack of professionalism (you want an “in-house” feel)

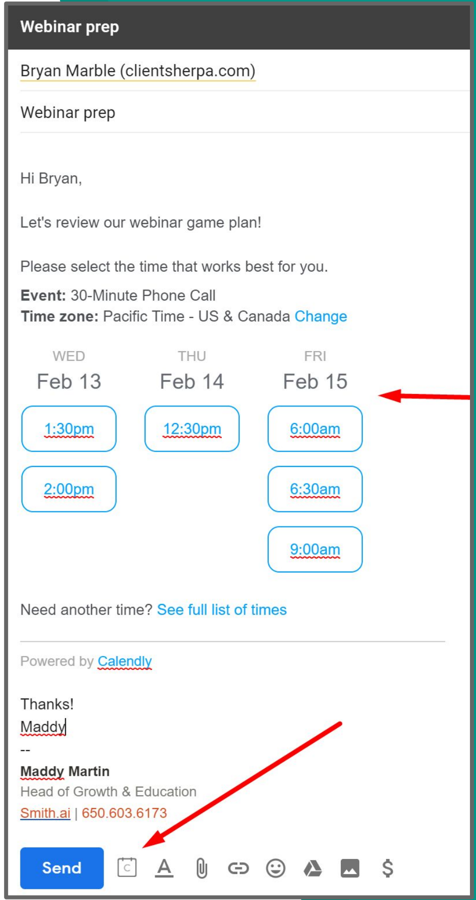
Step 1: Route inbound phone & **email** communications

- **Web contact-form completions**
  - Route to in-house & remote staff
  - Automate with email forwarding rules
- **Set multiple inboxes & permissions**
  - Leads, clients, accounting/billing
- **Marketing campaigns**
  - Lead nurture drips
- **Standalone bulk email tools**
  - Mailshake
  - Yet Another Mail Merge
- **CRM & case mgmt integration**
  - Reduce emails
  - Increase security
  - Log communications & documents
- **Reduce scheduling back-and-forth**
  - 2 people: Calendly
  - 3+ people: Doodle

Doodle



Calendly



Step 2: Limit calls & emails with **web chat** & texting apps

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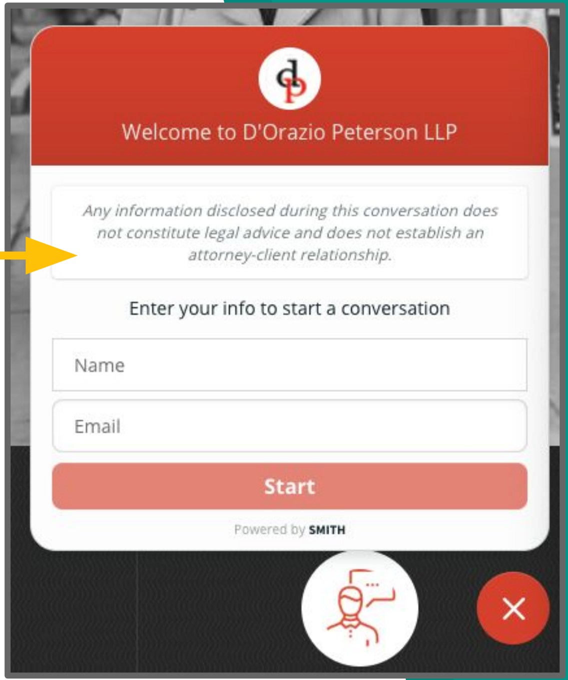
Types of Web Chat: Bot, Live & Hybrid

- **Bot**
  - Low cost and lightning-fast
  - Stock answers to common questions
  - Appointments, links to more information, forms, etc.
  - Escalation or service extension via email/phone
- **Live (Human)**
  - Low (self-staffed) to medium cost (outsourced)
  - Pay per contact, chat, or lead (definitions vary)
  - Lead capture, qualification, intake, scheduling, links, etc.
  - *Watch out for*: Self-staffed but unattended. Common, and then it's just another "contact" form.
- **Hybrid (Both Bot & Live)**
  - Automate routine answers & escalate to human via chat or phone as needed

Step 2: Limit calls & emails with **web chat** & texting apps

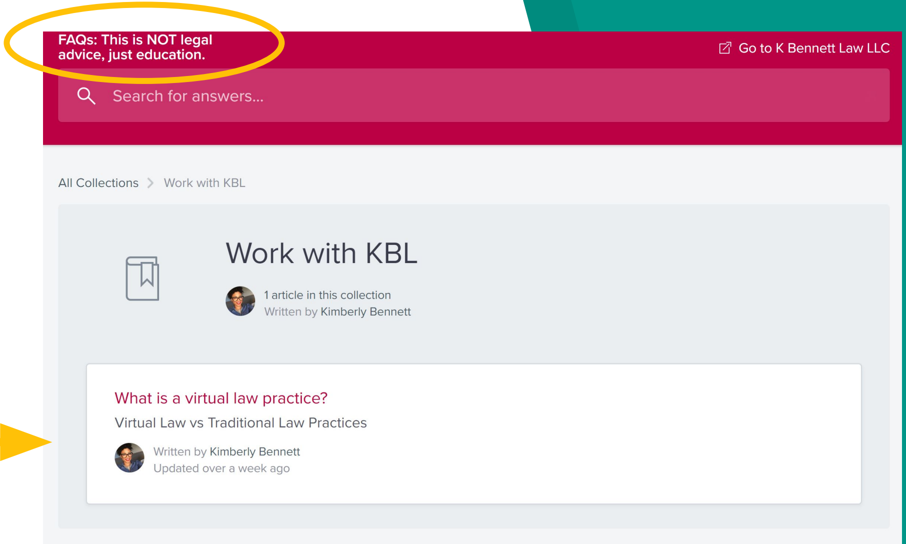
- **Proactive**: Staff with live agents, and choose "patient" active engagement
- **Page-specific help**: Reduce cost, focus on top-converting pages
- **Gatekeeping**: Serve as "gatekeeper" to online calendar for consultations to reduce no-shows and cancellations
- **Lead qualification & referrals**: Identify leads with your custom criteria
  - Schedule call-backs and appointments with new qualified leads
  - Refer out "bad" leads

Recommended: Add disclaimer before a chat starts



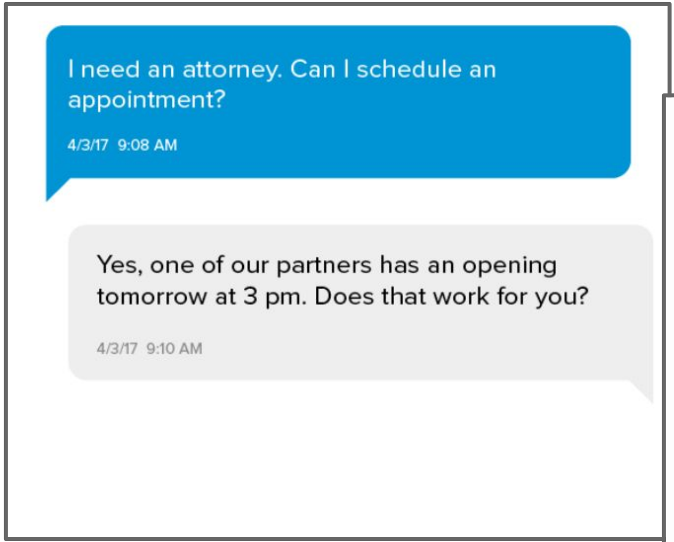
Step 2: Limit calls & emails with **web chat** & texting apps

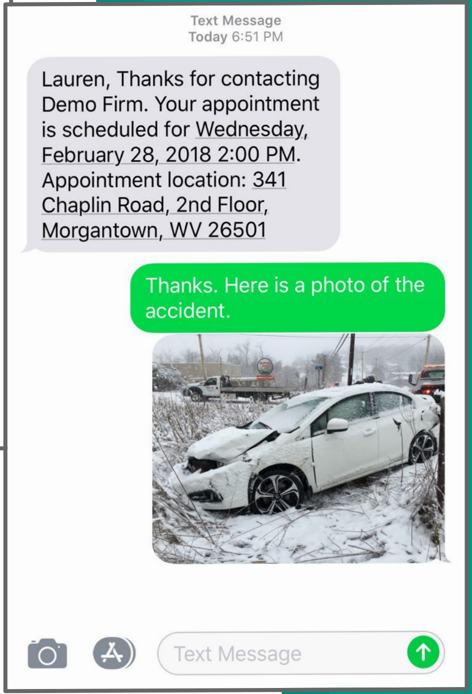
- **Self-filtering**: Don't just answer questions, also deliver information (e.g., fees) to aid "self-filtering" by leads themselves
- **Chat-to-call**: Instant transcripts and chat-to-call flow allow immediate, informed intake by remote or in-house staff
- **FAQ**: Build knowledgebase of FAQ for improved self-service, e.g., http://educate.kbennettlaw.com/work-with-kbl/what-is-a-virtual-law-practice



Step 2: Limit calls & emails with web chat & **texting** apps

- **ZipWhip (& other independent apps)**
  - Add texting to your landline
  - Click-to-text from your website
  - Keyword-triggered texts
  - Auto-reply after hours
  - Schedule texts (invoices, Appointment reminders)
  - CRM integration of texts & pics, plus bill for clients' texts
- **CRM / Intake software (native texting built-in)**
  - Remind: appointments, documents due, court dates, payments
  - Log: docs, images, time spent texting
- Time Miner (& other time-tracking text apps)





Step 3: Automate lead capture & qualification

- Identify must-have criteria for leads
- Standardize questions to identify qualified leads
- Implement workflow for qualified leads
  - See “monetize ‘bad’ leads” for unqualified-lead workflow
- Incorporate new-client call-back or appointment
- Determine policy on consultations:
  - Length (15 minutes to 1 hour)
  - Format (phone, Skype, video chat, in-person)
    - Consider comfort level, personalization, ease of use
  - Free or paid
- Outsource process as much as possible
  - Inbound calls > trigger workflow
  - Inbound emails & contact-form completions > trigger call-backs > workflows
- Leverage services with best-in-class technology, e.g., ZIP lookup vs. “Let me Google that for you”

Step 4: Hand-off new client intake

- After lead capture, complete client intake
  - May occur before or after appointment booking or first appointment
- Same as lead capture, identify required questions without overloading
  - Aim for ~5-10 questions
  - Balance completeness with cost/necessity (especially if outsourcing)
  - Standardize for all clients or client groups by practice area
    - E.g., Different forms for family law vs. social security disability)
  - Consider document upload option
- Always ask lead for source (“How did you hear about us?”)
- Outsource with clear instructions & non-login accessible URL

Examples: Basic intake forms

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Standard intake form :

- [Cooper Law, LLC online intake form]

1

Cooper Law, LLC
(612) 568-4529

Home · Who We Are · What We Do · Where We Work · News · Contact

Get started with Cooper Law by submitting an online intake form to give us more information about your legal situation. After you fill out the form, you will be able to schedule yourself for a consultation.

Cooper Law Online Intake Form

Use this form for the initial online intake if you are looking for family law representation or social security disability representation. After you fill out and submit the form, you can schedule yourself for a 15 minute free consultation to determine if your legal matter is a good fit for Cooper Law, LLC.

Name *

First

Last

Address

Street Address

Address Line 2

City

State / Province / Region

ZIP / Postal Code

Country

2

Phone *

Email

How did you hear about Cooper Law, LLC? *

What is your legal issue? *

- Family Law (Dissolution, divorce, custody, parenting time, support)
- Social Security Disability
- Other

Is there a court hearing scheduled in your case? *

- Yes
- No
- I don't know

SUBMIT

After form completion, potential client is given option to book free 15-minute consultation.

Lead selects:

- Practice area

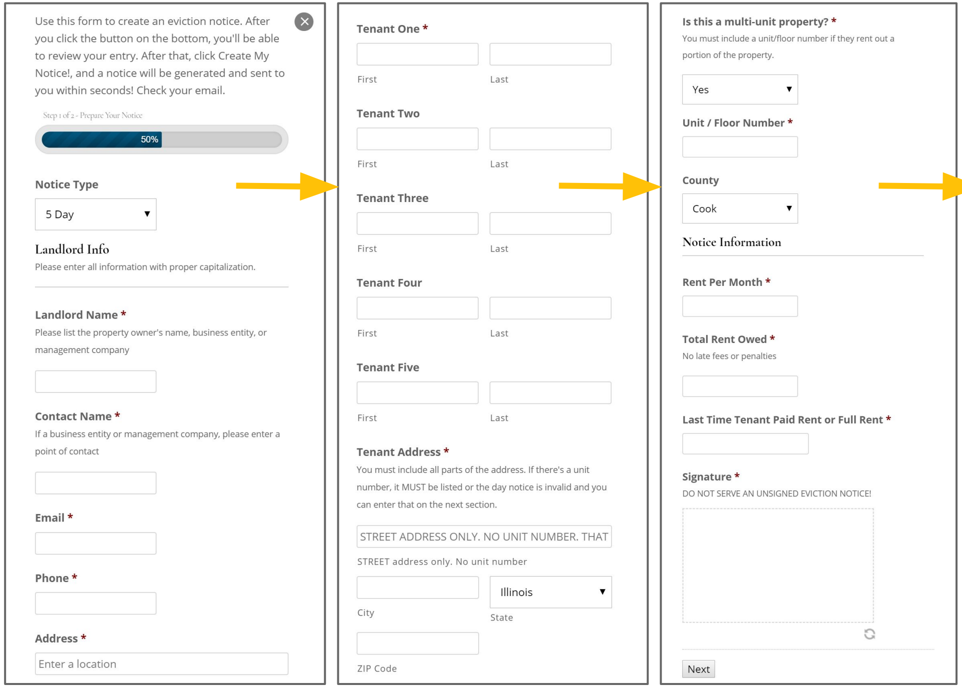
- Whether a court hearing is scheduled

*These are required fields.

Examples: Basic intake forms

Alternative forms that double as basic intake forms:

- Traffic ticket estimate request form vs. standard traffic ticket intake
- Eviction notice (see below)


Use this form to create an eviction notice. After you click the button on the bottom, you'll be able to review your entry. After that, click Create My Notice!, and a notice will be generated and sent to you within seconds! Check your email.

Step 1 of 2 - Prepare Your Notice

50%

Notice Type
5 Day

Landlord Info
Please enter all information with proper capitalization.

Landlord Name *
Please list the property owner's name, business entity, or management company

Contact Name *
If a business entity or management company, please enter a point of contact

Email *

Phone *

Address *
Enter a location

Tenant One *
First Last

Tenant Two
First Last

Tenant Three
First Last

Tenant Four
First Last

Tenant Five
First Last

Tenant Address *
You must include all parts of the address. If there's a unit number, it MUST be listed or the day notice is invalid and you can enter that on the next section.

STREET ADDRESS ONLY. NO UNIT NUMBER. THAT
STREET address only. No unit number

City
Illinois
State

ZIP Code

Is this a multi-unit property? *
You must include a unit/floor number if they rent out a portion of the property.
Yes

Unit / Floor Number *

County
Cook

Notice Information

Rent Per Month *

Total Rent Owed *
No late fees or penalties

Last Time Tenant Paid Rent or Full Rent *

Signature *
DO NOT SERVE AN UNSIGNED EVICTION NOTICE!

Next

Landlord receives completed eviction notice via email with submission instructions

Law firm is notified of new lead

Reminder is scheduled for follow-up based on "notice type" timing, e.g., 5 days

Tip: Require agreement to website terms & conditions upon form completion, so emails (e.g., lead nurturing campaigns) can be sent as follow-up communications to increase lead-to-client conversion. Agreement to terms = permission to email.

Step 5: Streamline appointment scheduling, reminders & check-ins

- Add public-facing booking page on your website
  - Integrate with your calendar
  - Make more or less visible online based on your needs & comfort level
    - **Accessible** (must know URL or be included in workflow, e.g. lead nurture drip) **vs. obvious** (in main menu)
  - Free vs. fully featured
    - Integrations for payments and intake forms
    - Multiple appointment types & durations
    - Multiple coworkers (round-robin)
    - Booking with approval
- Outsource calendaring tasks, via inbound and outbound calls
  - Appointment booking
  - Reminders (reduce cancellations/no-shows)
  - Rescheduling
- Outsource non-confidential client check-ins to receptionists.
  - Helpful for busier periods. Be proactive. Informed clients are more satisfied.

Example: Online consult scheduling

See it live (Acuity): https://nicollawofficesscheduling.as.me/schedule.php

Initial Phone Consultation-New Clients
30 minutes
The first thirty (30) min. of the phone consultation is entirely FREE. Additional time may be purchased at the rate of $300 per hour. No legal advice can be given out until a conflict check has been completed. Client must complete form for conflict checks online at: https://justie4justice.typeform.com/to/iVu3Ic, prior to the phone consultation. All parties (witnesses, adverse parties, etc.) must be listed on the form!

Phone Conference
30 minutes
For other attorneys, court staff, or existing clients who just need to chat, please schedule on Justie's calendar using this appointment type.

Discovery Review & Strategy Meeting
1 hour
For existing clients, only. Please schedule a review of your case using this link once reports, media, and other discovery has been transmitted to you via email. An in person meeting with the attorney will be confirmed at the office location closest to you to go over all of the reports, discuss possible plea outcomes, and determine whether to proceed to trial.

PSG Hearing Preparation
1 hour 30 minutes
All PSG clients will prepare for their PPO Hearing at least 48 hours in advance of his/her hearing date. In person meetings are scheduled at the Rose Andom Center 1330 Fox Street, Denver, CO 80204, unless otherwise requested. All clients should plan on doing a phone call with the attorney prior to scheduling the in person meeting. Clients are responsible for gathering all evidence prior to the meeting, and the incident survey is online at: https://justie4justice.typeform.com/to/gEay2C.

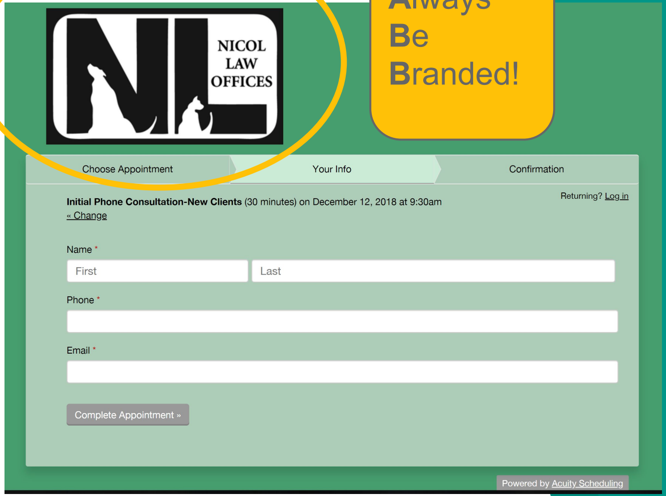


ABB:

Always
Be
Branded!

Step 6: Consistently collect payments

- **Accept online payments**
  - Higher collection rate outweighs fees
  - Embed on website or link offsite
  - General payments or specific invoices
  - Credit card, ACH & e-check
- **Increase accuracy**
  - Log texting time: Time Miner & Zipwhip
  - Log email-drafting time: Accelo, Timely, Email Stopwatch (Outlook), PayDirt
- **Outsource payment collection**
  - Consultations
  - Deposits
  - Retainers
  - Invoices
  - Past-due payments

Step 7: Systematize referrals: "bad" leads out, "good" leads in

- **First: Review relevant rules:** Paid referral fees for recommending attorneys is typically NOT allowed, unless there is divided work responsibility and clearly agreed to by the client.
- **Then, set & implement process for "bad" leads**
  - Think back to potential client qualification criteria
  - Identify "bad" (read: unqualified) potential clients
  - Make a list of all attorneys & firms you recommend by practice area
  - Share list with staff or receptionist service, including instructions for identifying correct firm to recommend to "bad" lead
    - E.g., based on location, practice area, cost
  - Consider this as a *service*: Systematically earn good will & educate future potential clients and referral sources

- **Also, set & implement plan for "good" lead generation from referrals**
  - Join groups & networks
  - Propose reciprocity for inbound referrals
  - Actively educate peers & community about what you do
  - Build brand via education, workshops for potential clients & other attorneys, teach CLEs (!)

YOUR GAME PLAN (READ: HOMEWORK)

It's up to you now.

What to do **next**

- **Track your time for one week:**
  - Billable & non-billable work
- **Tag all non-billable work:**
  - Self (continue doing)
  - Streamline (cut/reduce/ease)
  - Automate (w/ software or app)
  - Outsource (w/ service)
- **Prioritize fixes by greatest time consumption, importance (lawyering) & urgency**
  - Consider [Eisenhower Decision Matrix]
  - Tips:
    - **Scheduling & payments** are often most time consuming & most easily outsourced
    - **Data entry & lead follow-up** are most easily automated
- **Address top 3 in next 30-60 days**, depending on scope, cost & difficulty.
- **Wait 1-2 months to re-stabilize.** Fix or address another 1-3 per quarter.
- **Assess impact of fixes every quarter:** savings, earnings, leads, clients, work/life balance, stress levels, sleep quality, etc.

Free additional resources

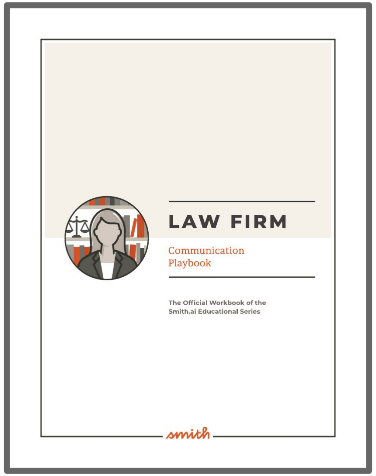
Smith.ai eBook:

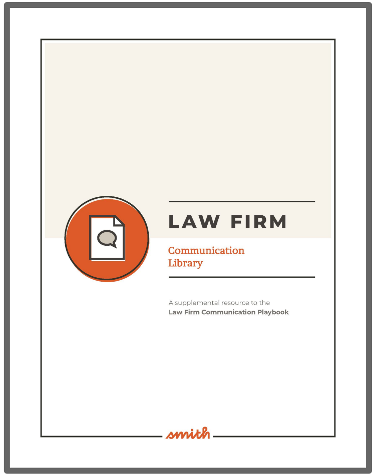
Are you Lawyering or Laboring?

Free additional resources

Smith.ai Guides

[Law Firm Communication Playbook]





[Law Firm Communication Library]

Questions?

THANK YOU!

Email: maddy@smith.ai