

CRM: What's In It For You?





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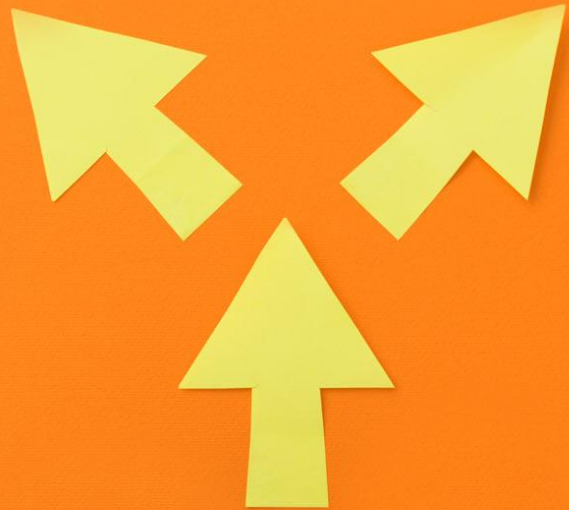
Matt is Co-Founder and CEO of Lawmatics, the #1 attorney-client relationship management platform that provides law firms with client intake, CRM, and marketing automation. With Lawmatics, law firms win more business, impress clients, and are more efficient.

Prior to Lawmatics, Matt was Co-Founder and CEO of MyCase, a legal practice management software company which was acquired by AppFolio in 2012.



Lawyers, Not CEOs

Running a business is hard and
wasn't taught in law school



Running a Business is Hard



Maintain Office

An office doesn't run itself



Keep Growing

Your goal is to grow your business, not stay flat



Success

Still can't forget about being a lawyer and getting great outcomes



Scheduling

Court dates, client meetings, so much to keep track of



New Clients

Without new clients the business will slowly die



Marketing

Marketing? You're telling me I also have to be a marketer?

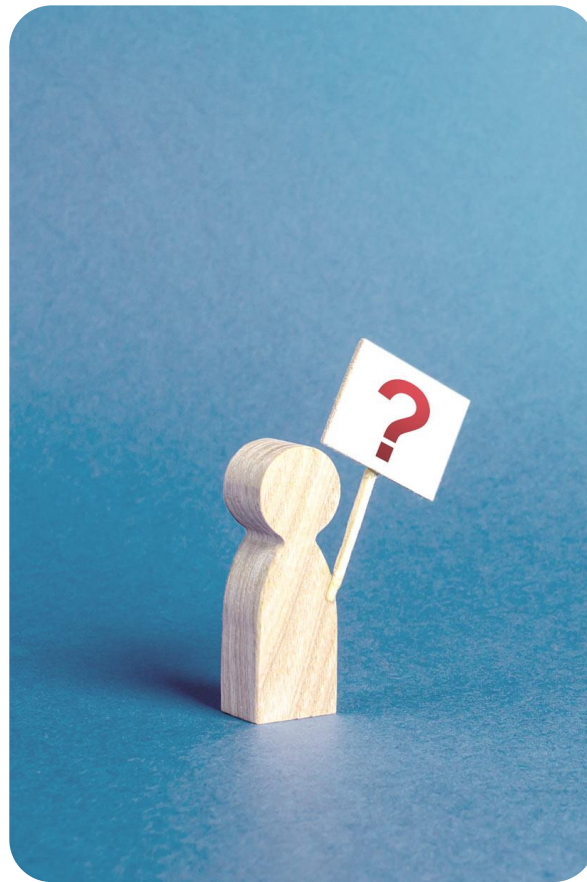
What is CRM?

Customer (or Client) Relationship Management

- Time to start thinking like business-owners

CRM covers the whole lifecycle, helps referrals

- From welcoming new leads to wishing old clients happy birthday



What does CRM include?

Intake

- Anything communicative (emails, SMS)
- Appointment booking, scheduling
- Forms
- Notes
- Tasks

Marketing

- Ad campaigns
- Audience segmentation
- Data & analytics

What is a CRM not?

- ✗ Practice management
- ✗ Case management
- ✗ A CRM is just one component of a robust tech stack
 - If you have a CRM, you don't necessarily have practice management - and vice versa
 - Integrations
- ✗ CRM is more foundational to your firm
 - CRM captures every point of contact, but PM or CM doesn't

Why do you need a CRM?



Save Time

An average law firm that uses Lawmatics saves 15-20 hours per week



Increase Business

Expand your capacity to do things that currently seem out of reach



Create Better Strategy

Analyze data on revenue by case type, cost of acquiring new leads, and most effective marketing efforts



Create Relationships, Not Clients

Consumer expectations are high for everything from package delivery to coffee – professional services are no different

3 Phases of the Client Journey

01

Client Intake

From the moment a lead contacts your firm to the signing of the fee agreement and payment of initial fees.

02

Active Matter

You have retained the new client and now have an active matter, a defined scope of service.

03

Former Client

The matter is over and this client is now a former client, a source of good reviews and referrals.



Happy Clients = Happy Practice

Why Legal CRM > Generic CRM?



Legal-specific Features

Automatically check leads and PNCs for potential conflicts



Workflow Pipelines

Build out dynamic workflows for each practice area or matter type



Data & Analytics

Get the insight you need to form your firm's marketing strategy



Price

General CRMs tend to be outside a typical firm's budget

Appointment Booking

01

Online Booking

Give prospective clients the flexibility to schedule an appointment without playing phone-tag

02

Automatic Confirmation

Instantly confirm appointments, and send follow-ups with directions for parking

03

Pre-Consultation Form

Capture detailed information about the lead and matter from the start

Use cases



Consult follow-up

- Next steps email, send engagement agreement or scope of work, follow-up



Consult no-show

- Reschedule email, booking link



Closing the lead

- E-signature, invoicing, and payment





Marketing & Intake

- Ad campaigns, targeting practice areas



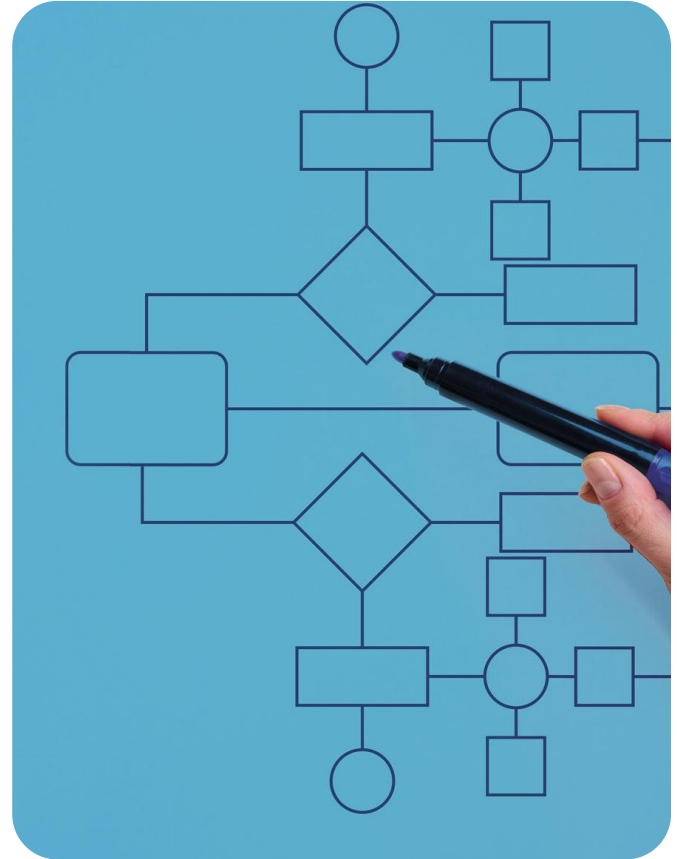
Nurturing

- Birthday emails, newsletters, case studies, thought leadership content



Hand-off from CRM to practice management

- Integrations



Q&A?

Matt answers your burning
questions about Law Firm
CRM





**ANNUAL
CONFERENCE
& EXPO** May 7-10

Seattle Convention Center
Seattle, Washington

Stop by booth 1110 to meet our
team and register for a \$250
Amazon gift card!





Thank You

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