Lawyers and Leads: How to Ethically and Effectively Develop Business

PRESENTERS:
Chelsey Lambert chelsea@lextechreview.com
Traci Ray tray@BARRAN.com

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Lawyers and Leads: How to Effectively and Ethically Develop Business

You have revenue or you have nothing. An unfortunate truth of running a business. One that is the downfall of so many solo and small law firms.

Most attorneys cringe at the word "sales," but let’s face it – to succeed at business development, you must understand how to sell your services. In this session we’ll discuss capturing, tracking, and following up with "leads" in the digital age.

1. The Three Rules of Law Firm Marketing

   1. Marketing is a lifestyle not a project.
      a. Much like those new year’s resolutions we make about losing weight, the effort only lasts so long before interest dissipates and we are back to our old ways. Marketing and business development activities are a non-stop routine of effort and refinement.
   2. Using technology is critical to success and measuring ROI.
      a. Without technology, a law firm cannot generate, track, manage or measure the effectiveness of a marketing campaign. Even the simplest excel spreadsheet is a start towards understanding where money in advertising is best spent.
   3. Proper training of all staff involved in the sales process is required.
      a. Logos don’t sell legal services, people do. The training and ongoing coaching of staff who interact with leads is a mandatory part of every law firm’s marketing strategy.

2. Standards. What is your definition of a great lead?

A successful law firm knows exactly who they target, where to find them and how much it costs to generate a lead that matches their ideal criteria. Before we dive into where, when and how to generate leads you should understand each of the following.

   1. Buyer Persona
      a. An exercise when you write out the characteristics of your ideal client(s). Who they are, and details about where they hang out, income, interest level, and more.
   2. Cost Per Lead (CPL)
      a. The total cost of generating a contact who is interested in the legal service(s) you provide.
   3. Cost Per Appointment (CPA)
      a. The total cost of generating an appointment. Also known as the cost of an opportunity, when converted from a lead to an appointment or consultation.
   4. Cost Per Retain (Also known as cost of acquisition / COA)
a. The total cost of acquiring a new client. From the time the lead was generated, all the way through to the retain.

3. Capturing Tracking and Following Up with Leads

Traci Ray

Capturing, tracking and following up with leads is essential to marketing – not just in law, but across all businesses and industries. Developing and solidifying relationships is a building block of successful companies, and it can be as simple or as complex as one would like. The following are some ideas that can be adopted and personalized to each firm/lawyer as necessary:

_Capturing Leads_
- Types of leads include clients, potential clients, and referral sources
- Make meeting new people a goal (and give it a monthly number so you can track your success), and afterwards connect with at least three new colleagues on LinkedIn
- Go to events, lunches, dinners, non-profit fundraisers, your children’s activities – the list is limitless
- Track which events are “target rich” for you, and attend similar events
- When giving a presentation, take a raffle item so that attendees are encouraged to add their business card into the raffle
- Arrange for introductions from people you know
- Create signature events that you invite friends, colleagues, clients, and target to attend
- Send out newsworthy information to your target audience, and invite people to connect with you
- Reach out to people on LinkedIn
- Join a Board or Committee that interests you
- Attend industry specific gatherings

_Tracking Leads_
- Enter names into ANY sort of database with as much info as possible – especially their name, company, title, address, email, telephone, date of first contact/description, and mark them down for any services (events, newsletter, seminars, holiday card, etc.) you plan to use to follow up with them
- Take a snapshot of business cards, and have them automatically upload (or, ask someone to help you enter the info into a database)
- On a quarterly basis, look through your LinkedIn contacts to see if you have contacts you should add to your
**Following Up With Leads**
- Set up a tickler system to ensure follow up (your Outlook calendar, special programs, event/time of year driven, etc.)
- Send along articles of interest via email
- Send handwritten notes
- Set up a coffee or lunch
- Invite to an event you are already attending
- Invite to a Signature event you/your firm created
- Have an internal monthly meeting to hold yourself accountable (and for some fun, add in prizes to keep people/yourself motivated)
- Send holiday specific gifts/cards
- Connect leads with contacts that could potentially expand the lead’s network, and add value to their business

4. Tools

4.1 Chat Bots
- Case.One – Chat Bot
- Law Droid

4.2 Text Messaging
- Pinger
- Twilio

4.3 Case Management Systems with Built-in Text Tools
- CasePeer
- LEAP Legal Software
  Practice Panther
- Clio + ZipWhip

4.4 CRM Systems
- LawRuler
- Lexicata
- LawMatics
4.5 Pay Per Lead Providers

- Unbundled Attorney
- Legal Zoom
- Rocket Lawyer
- Legal Match
- Nolo
- Total Attorneys

4.6 Law Firm Specific Marketing Agencies

- Attorney Sync
- BluShark Digital

5. The low down on legal lead gen: A view from the inside.

By: Chelsey Lambert

Disclaimer: The following is based from my experiences as a business owner, and as a former lead gen employee spokesperson. Policies, rates and lead processing vary by provider and often change. Contact the organization directly for specific delivery details and pricing.

Overall the consumer marketplace, retail and B2B sales efforts are familiar with the act of ‘purchasing leads.’ Either you generate them on your own, or you use a service to bring them to you. Whether that’s the Yellow Pages, Sales Genie, USA Data lists or another avenue, it is a cost of doing business.

In my own ‘off the record’ opinion, lawyers have been trained to get business through word of mouth, referrals, and in general being a good, or well-known lawyer in their community, industry or business circle. That landscape has changed. Now it’s hard to get seen, build a great website, and market yourself in 20 places. While paying per click, or a daily fee to do so.

Enter lead generation.

Taking the marketing work out of it, and delivering just the contacts, leaving the business owner to do the work. Therein lies the problem for lawyers.

Lead generation is often miss-sold as a turnkey, magical fountain of clients running through your door. When in reality if 1 out of every 10 or even 20 leads you purchase turns into a client. Why? Because online lead generation is a different animal, and it’s a beast. You have to be serious and ready to respond on a dime. The mentality of a consumer searching on the internet differs from any other lead. We provided extensive coaching and training to our clients, and some made their money back hand over fist. Others would wait until the end of the month, pull their list of leads and send them an email... wondering... why hasn’t anyone hired me?! Any then... why do I have to pay?
Which whether or not a contact turns into a case, you must pay for the lead. Non-law firms offering lead generation services are not allowed to exercise discretion beyond Fake name, bad phone numbers, or fraudulent contacts. So when you get a bill for 100 contacts billed at $75 each, know you’re on the hook for it.

**Key Takeaways:**

If you are ready to try out pay per lead services as a marketing source for your law firm, consider the following:

1. ROI from a lead gen service typically takes about 90 days. Most providers will require a commitment of at least that to prove their value.
2. The mentality of an internet lead differs from a referral or walk in. They are answer hunting and require a different approach. Calling within 5 minutes of receipt is key, also being able to sell over the phone is a must.
3. Tracking is critical, there’s no way to know if you’re getting value, and what’s worth paying for if you don’t keep track of the leads, and more important what happens after you get them. The law firm must have a solid intake process and follow up person, especially in competitive practice areas.
4. In order to ‘dispute’ or ask for credit for services or leads you will need to have detail on why or a tracking report to fight the charges.
5. Be ready to spend, these services are not cheap, and don’t really ever offer discounts.

**Is there a difference between lead generators?**

For example, LegalMatch, LegalZoom, Unbundled Attorney, Nolo, Total Attorneys – are they all essentially doing the same thing or are there qualitative differences in their models? All are essentially doing the same thing. Differences include:

1. The quality of the websites the consumer is being directed to (educational, or just a capture?)
2. The follow up process after the lead is submitted (Do they have a call center, or is it a cold form handoff)
3. Pricing and distribution processes vary, quality is about the same. Many providers are also selling to each other to supplement areas they don’t have enough traffic for, or have overflow they must sell.

**In closing**

Consider your budget and options, lead generation services aren’t cheap but do offer an instant pipeline of potential clients. If you choose to incorporate these services into your overall marketing plan, be sure to have the proper systems and staff training in place to handle the increase.

By: Chelsey Lambert

DIY Legal Clients, Unbundled Legal Services and Low Bono cases have long been disregarded by attorneys as casework that doesn’t make them any money.

This belief is a massive misconception, one that Unbundled Attorney, a lead generation company that works with hundreds of attorneys across the country that provide unbundled legal services, has proven to be unfounded.

Before explaining how they have shown this to be the case, let’s breakdown the criteria that would place a potential client in the DIY/Unbundled Legal Services category.

1. They are willing to do a portion of the form filling, court filing, or legwork themselves.
2. There is no litigation involved – these are limited tasks by nature.
3. The client is looking for a flat fee for these services.
4. They are educated enough to know that unbundled legal services could be an option for their situation

Now, when you think of unbundled legal services, I know the first thing that may come to mind is:

But, how does the client know what they need? And, it will always take me more time than I’m getting paid for!

The moment of misconception lies right here. True, you are a lawyer, and they are not. True, you know what they need and should advise them on the best options.

However, it is an undeniable fact there are hundreds of thousands of clients filing pro se that would willing pay a lawyer for limited scope representation. You just need to know how to handle it, and create a process that instead of costing you time and money, actually increases the value of the time you spend in dollars.

This is what many of Unbundled Attorney’s clients refer to as a “High Effective Hourly Rate.”

An example of this would preparing a petition for a client as an unbundled task billed at a flat rate of $500. Now, for the typical firm delivering this task might take 2 hours of attorney time, and so their “effective” hourly rate would be $250 per hour.

But what if your firm was leveraging cutting edge intake and document automation technology that enabled you to get this same task completed in one hour? Now, this seemingly “low value” task all of sudden carries an “effective” hourly rate of $500 per hour.

This is one of this things that sets Unbundled Attorney aside from every other pay-per-lead service out there. They support their attorneys with education and training on how to deliver Unbundled Services and other creative options efficiently and profitably.

They also have recently integrated with Lexicata which is a sales and intake CRM that automates much of the intake and new client conversion process.
Combine that with their integration with Clio, and their partnership with LawPay, they have developed a seamless flow from Lead Generation (Unbundled Attorney), to Sales and Intake (Lexicata), to Online Practice Management (Clio), to Payment Processing (LawPay).

During my days at Total Attorneys, the organization who pioneered the pay per lead market in legal, this was the holy grail. To offer one seamless experience from lead generation all the way through to payment eliminates so many administrative steps, while keeping the client engaged throughout the process with automated client communication and management tools.

As Co-Founder Dave Aarons shared with me on the phone, technology that makes the enrollment and communication process seamless and simple is expected by today’s smartphone carrying, mobile-enabled clients. The more automated tools you can implement such as mobile friendly intake forms, online retainer agreements, virtual consultations, and online payment solutions, the more often clients will retain you and the more profitable these cases become.

However, these powerful tools are only useful if you have a steady stream of new clients to provide these services to. Marketing is one of the most difficult areas for solo and small law firms, and the going rates of pay per click advertising, and SEO consultants make it difficult to compete. So, instead of trying to crack the magic marketing code to make it rain, why not buy the case volume you need?

What makes Unbundled Attorney’s leads unique is they are voluntarily requesting to be connected to a lawyer with the understanding they will work with an attorney for a fee. In addition, many clients are open to the idea of investing some legwork into their case to cut down on the cost.

Some client success stories that have been shared on Unbundled Attorney’s podcast include solos that have skyrocketed into successful law firms with multiple employees, immigration lawyers that have developed a fully virtual practice offering unbundled services, small firms generating tens of thousands of dollars in additional monthly revenue from their leads, and many others.

Unbundled Attorney’s leads are exclusive and delivered in real time. You find out if they still have leads available in your region and practice area by visiting their website. They provide leads for Family Law, Immigration and Estate Planning/Probate.

Finally, one thing I appreciate most about Unbundled Attorney and their founders is they have an underlying mission and purpose behind what they do.

**To Close the Access to Justice Gap**

For them, it’s not just about generating additional revenue for their attorneys, which they have been very successful at so far. It’s about helping millions of people who need legal help that are being forced to represent themselves because cannot afford to pay a traditional retainer up front.

Attorneys, don’t fear the DIY/Unbundled Legal Services market. It’s a place where doing a good deed pays off in cash.

**Mistaken Identity! The Difference between CRM and Practice Management**

*By: Chelsey Lambert*
You may not know this, but my background includes quite a bit of sales experience. When speaking to attorneys about technology, I often hear. “What’s a CRM, isn’t that what a case management system does?”

To which I reply, “No, not really.” A vague answer for a vague question.

The following article is aimed to shed light on a very confusing gray area of functions when shopping for a case or practice management system. First you must understand what each tool was built to accomplish. To do this, let’s focus on the two distinct areas of a law firm.

Front of the house, and back of the house.

Front of the house is where all pre-client or prospect interaction occurs. Answering the phones, client intake, and retention. Back of the house is where the delivery of the actual services, and payment occurs.

A CRM (Customer Relationship Management) system is designed to support the front of the house sales process, while traditional case management features are built to help track, streamline and execute the back of the house processes. Herein lies the confusion. Think about the ‘statuses’ or names you would use to describe a contact during the time-frame when they are working with your front of the house team. A standard set of contact names, life-cycle stages are:

- Lead
- Prospect
- Potential New Client
- Opportunity
- Won
- Lost
- Not a fit
- Client

Now, let’s assume that you close that client and they retain your services. At that time, they become a back of the house contact or client. You will also need to associate other contacts with them related to their matter. Including but not limited to:

- Party
- Spouse
- Judge
- Mediator
- Expert Witness
- Child Custody Evaluator
- Insurance Adjuster
- Defendant
- Plaintiff

There may be several more depending on your area of law, or case type. As you can see, the two lists are very different. Because, until recently, the general population of lawyers have not had to monitor marketing efforts in a laser focused manner. Now, the marketing and business development aspects of running a law firm have changed. It is critical that law firms track and manage their leads. Which requires the use of tags, life-cycle stages, or a CRM tool dedicated to just that function of the business.
Case Management software platforms, particularly those in the cloud have done some work in this area. Most provide users the ability to tag or identify that a contact is not yet a client. However, the real feature gap lies in the management of that specific group of contacts. So much can be learned about where your law firm clients are coming from simply by utilizing CRM features.

When law firm staff tracks the stages of a lead in the initial intake and appointment process those actions can translate into thousands of dollars in new business, or saved marketing expenses for the law firm. How? By running a report or filtering contacts by status you can quickly project how many potential new cases you can expect. On the flip-side, you can also gauge which marketing sources are producing the most viable potential new clients.

But... these tools only work if they become part of your process. Which means, either taking the time to learn how to use tags, custom fields, or prospect level features in your existing software, or invest in a CRM dedicated to business development portion of your business.

So, why would I invest the time and money in CRM features?

Here are just a few ways CRM features when properly used can make your law firm more money:
You will know what your highest producing marketing sources are. Increase spend in these areas to watch the cost of acquiring a new client drop, while top line revenue grows.

The ability to go back to clients who did not retain you when you first spoke. This is an untapped area of revenue for so many law firms! Consumers can take up to one year to retain an attorney. Where did they go after speaking with your law firm? All contacts with a CRM stage of lost opportunity, or tag such as “not ready yet” can be filtered and called upon during staff downtime.

Targeted marketing. A CRM tool also has built in communication methods to send mass messages to contacts in a status. Let’s say they spoke to you when they weren’t ready. You can segment those leads and send them a follow up campaign, or helpful video. List segmentation can increase law firm conversion rates much faster than sending those leads the same newsletter that the rest of your list receives. Use segmentation and life-cycle stages to tailor a message that is specific to that group.

Focus intake and associates time on the leads that matter most. Instead of throwing a net into the ocean and filtering out the type of fish you want use CRM tools to identify the leads that have the most potential in retaining you.

Master and automate the intake process. A CRM is designed to help you generate leads. A case management system is designed to help you execute the work that the leads are paying you for. Leverage the automation process between your website, eBook and intake staff. Use tools that share forms, send template emails and e-sign ready retainer agreements to get them past the finish line as fast as you can. Then, spend the time you saved delivering an amazing client experience.

A true CRM is meant to be a sales powerhouse. The same thought process you use to set deadlines, reminders and automate tasks with a case management system, should be used for your leads too. While you won’t receive a complaint from the clerk’s office for filing a document past the due date your bank account will show the stress of one less client retainer payment being deposited.
I’ll be profiling some ways you can master the lead conversion and intake process in future posts. Consider this your ‘Intro to CRM and Lead Conversion’ 101 course!

7. Lexicata CRM Review: Supercharging the Law Firm Lead Conversion Process

By: Chelsey Lambert

In one of my recent posts, I explained the difference between Case Management Systems and a CRM (Contact Relationship Management) tool. Lexicata is the first true CRM tool for law firms, or as they like to call it ‘Pre-Case Management Software.’ A great explanation of where their elegant system would fit in any law firm.

Whether you are using a case management system or not, every law practice has to be diligent about keeping track of leads, documenting client intake, and making it as easy as possible for a prospect to become a client.

Lexicata has transformed the client intake process from a clipboard in the office with messy handwritten notes, into a beautiful mobile-friendly process anyone can use.

The platform’s purpose is to provide you with a place where you can record, manage and market to every contact, referral source, or marketing lead. To be explain their solution, I’d like to walk through a couple of use cases.

Client Intake

Our world has changed, and clients are now willing to sign up for services, and complete forms via email or their mobile device. Lexicata gives you the power to send an intake form to them that includes all of the general information you need, plus additional sections that expand based on specific answer choices. These are called ‘Smart Questions.’ Such as partners, multiple children, guardians, or other related contact’s information you will need to begin their file. Applicable to every practice area from Bankruptcy to Family Law.
Add an Intake Checklist, specific to case type which will issue one, or a series of template emails to combat the communication gap often felt by law firm clients. How many times have we all heard; ‘I talked to a lawyer, and haven’t heard anything from them!’

All the time. In fact, it’s actually the number one complaint of legal services consumers.

Next, in the same intake checklist, generate an engagement letter, or retainer agreement. Fill in the unique information, such as fee or description of services and... off it goes! To be electronically signed by the client. No downloading an app, no printing and signing. Just a beautiful, seamless experience, branded with your law firm’s information and logo.
What’s more, is that the e-signature tool is built in and included in the cost of Lexicata. No additional fees, or other software to sign up for. Simple, gorgeous, and mobile friendly. LOVE this feature!

**Augmented Client Information**

For most of us, our online profile includes a tremendous amount of information, a picture, location and more. All free and readily available. As a bonus feature, Lexicata will capture this information and automatically import it into your case management software. To help you put a face to the name, without having to creepily ask for a picture when they come into your office so you can finally use the client record picture option in your case management system.

**Managing the Sales Pipeline**

If you are still in denial that selling legal services isn’t a true form of sales, I’m sorry but you are mistaken. You are running a business, and the predicted health of any business can be seen in its sales pipeline. Now, if you are not familiar with the term it is a series of stages that happen along the course of a lead becoming a client. From a form they filled out which would make them a ‘lead’ to a conversation with the firm, turning them into a ‘prospect’ moving them into the intake process, making them a ‘potential new client’ a signed agreement, which converts them into a ‘client.’

In Lexicata, on one screen you can view your Matter Pipeline, at a glance viewing every opportunity for revenue your law firm has, and the stage each contact is currently in. About to hit a cash flow problem? Go look at how many prospects have agreements but haven’t signed, and get on the phone!

Don’t have a lot of leads in the first two stages? Ramp up your marketing before the flow of clients dries up. Need to hire a staff member, but don’t know if you’ll have the revenue to support it? See how many potential clients are lined up to work with you. You get the idea.

**Conversion Tools**
Any successful person can tell you that it will require 10X the amount of work to build a book of business than originally anticipated. Now, how on earth do you expect to remember those extra ten activities without some assistance?

Lexicata’s built in email marketing tools, client intake checklists also known as workflows, and contact tagging give you the system you need to stay on top of every lead that comes into the law firm.

**Business Intelligence Dashboard**

On the main screen of Lexicata, view contact totals for each stage of the pipeline, forecasted revenue, and reminders of follow up tasks. For which, there are countless use cases for Lexicata, all driving to a better understanding of one of the most important parts of your law firm.

![Lexicata Dashboard](image)

**You Have Revenue, or You Have Nothing.**

Fancy marketing ideas, and a shiny new office are all nice to have. But, if you cannot properly generate, track and convert leads into clients, you won’t be in business for very long. Lexicata gives the law firms who use it visibility into their revenue streams. Which referral sources are generating the most clients, and which marketing activities just aren’t producing. One of the biggest mistakes I have seen law firm’s make is spending money on advertising without investing the tools they need to convert the clients.

**Integrations**

Include Clio, MailChimp and HelloSign providing you with one central point for all pre-case work that transfers over to your Clio account if you’d like it to. Custom fields in Clio match up to custom intake form fields in Lexicata, signed documents move over as well. One off emails sent from the system are sent from your email addresses, so that clients reply and it goes directly into your inbox. Built in marketing campaigns like Newsletters, Lead Sequences, or Win Back messages for leads who never retained you can be created in MailChimp and sent from Lexicata, no need to even log a second platform. They can even integrate with your website, social media, virtual
receptionist services, live chat, and more to automatically pull new leads directly into your Lexicata system.

**In Closing**

Law firms who recognize how much time, energy and cash it takes to generate a lead recognize the importance of having a system to manage every step of the conversion process. Lexicata has successfully built one of the best CRM platforms I have ever seen implemented in a law firm environment.

Easy enough for anyone to use, and sophisticated enough to impact conversion rates. Make your marketing dollars go farther by leveraging Lexicata for your lead management, client intake, and sales process.

**Supplement Video:** Interview and Walkthrough of Unbundled Attorney leads dropping into Lexicata, and moving into Clio for case handling.

[Video Link](http://lextechreview.com/video-review-interview-unlock-automate-high-value-revenue-stream-law-firm-featuring-unbundled-attorney-lexicata/)

**With Special Guests:** Dave Aarons, Co-Founder of the Unbundled Attorney and Michael Chasin, Founder of Lexicata!

The need for new clients never goes away. It is one of the greatest challenges for brand new attorneys and established law firms alike. In this special session we address the need for new clients, and how to convert typically low margin flat fee cases into a strong source of revenue for your law firm using technology.
Due to their brand-new integration, Unbundled Attorney’s leads can now be delivered directly into a Lexicata account in real-time. Once a lead is converted into a paying client, Clio users can have that data instantly populate into their account for billing and client management. This is a first-of-its kind integration suite that allows lawyers to automate and streamline their lead generation, new client intake and client management. When used properly, the combination of these tools can result in a massive opportunity for growth, while serving one of the largest untapped population of legal clientele.

In this special interview style session, we speak to two leaders in legal technology and breakdown the misconceptions and benefits of serving this group of legal consumers.

Watch it and include these tools in your law firm’s revenue strategy for 2018!