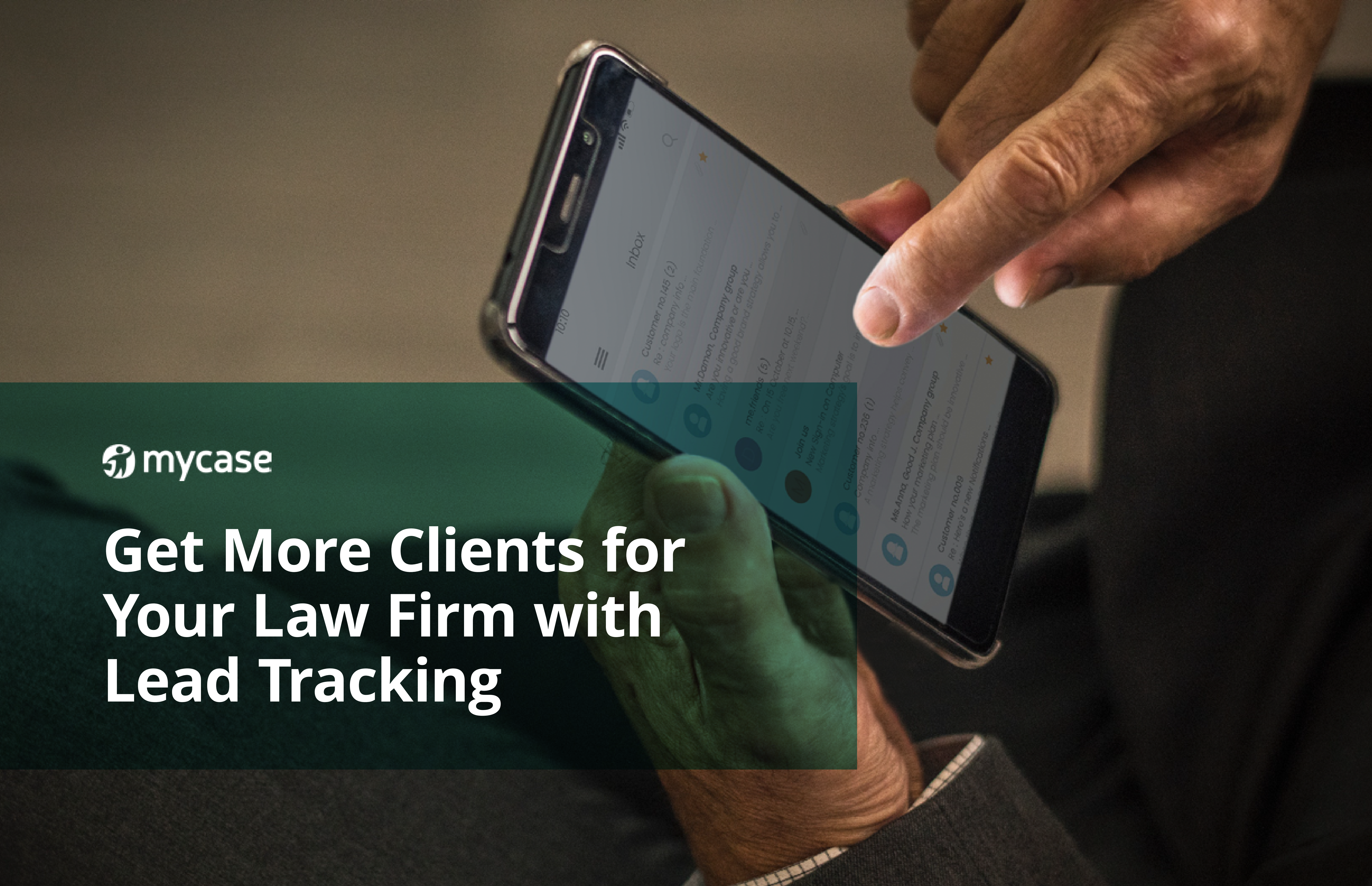

mycase

Get More Clients for Your Law Firm with Lead Tracking

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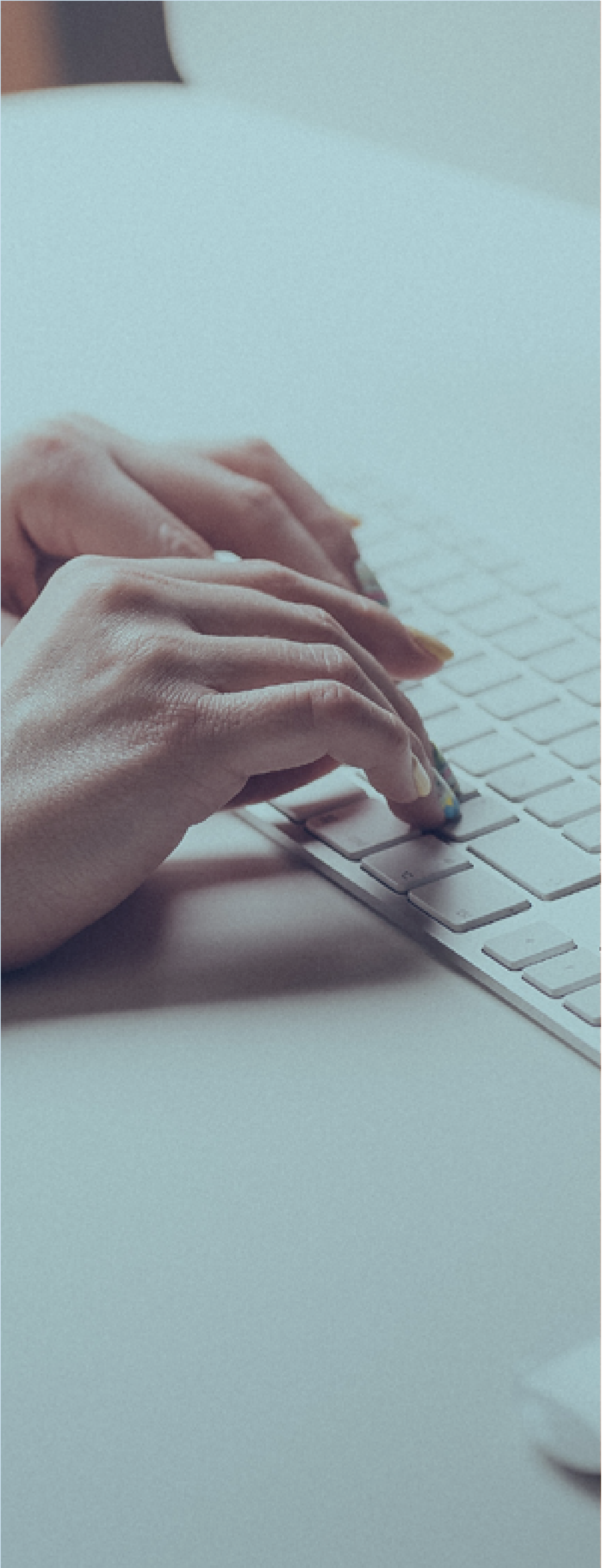
Introduction

Like most businesses looking to grow, law firms spend a significant amount of time and money to attract potential new clients (leads). However, many firms lack systems to ensure the lead is tracked, nurtured, and ultimately converted into a client. In fact, we still regularly hear lawyers complain, “I know I need to do X but I don’t really know how to measure or track the results of that.” Understanding how to implement such systems can have a significant impact on your ability to meet your firm’s growth objectives.

Identify Prime Engagement Channels

When implementing a lead tracking system into our law firm, we have to consider how our target audience prefers to engage our firm. Do potential clients prefer phone calls, emails, forms, live chat, something else? Pro tip: most are likely to prefer the phone for initial conversations. While you should nudge potential clients to preferred calls to action, don't force them. Provide them options. Ask them how they prefer to communicate.

The reason we start here is that the manner in which your potential clients prefer to interact with your practice will play a significant role in choosing your systems and tools. For example, if your next clients prefer email, you want to design your system around making it easier for them to engage you that way.



For our example, we're going to build a system for a firm for which the following is true:

The firm serves local legal services consumers who are likely to use the web to find information about their legal issues / needs.

The target audience prefers to engage the firm in a variety of ways including phone, live chat, and forms.

The firm has a diverse marketing / advertising portfolio that includes organic search, paid search, social media, paid social media, and email.

Now that we've examined how potential clients prefer to engage us, the next step is to consider the tools we are going to use.

For our example, we'll need tools for:

Call Tracking

Preferably with keyword pool tracking, but at least dynamic number insertion by channel.

Website Chat

Preferably answered by a human, but at least with a bot that can stop temporarily stop the consumer's search and schedule a next step.

Web Form

Preferably that captures the visitor's referring source / medium, landing page, and conversion page.

There are many options out there, and without knowing more about your specific firm, it's difficult to make an informed recommendation. If we're talking call tracking, however, CallRail stands out as a favorite among competitors for tracking any leads coming in via phone.

Customer Relationship Management

Once you've solved for providing the means by which potential clients can engage your firm, the next step is to consider where these inquiries are routed. This is the realm of client relationship management (CRM).

It's worth noting that CRM is not always the same as practice management. While some practice management solutions are moving into the CRM space, many practice management solutions don't have sophisticated lead tracking and reporting features that will enable you to track calls, forms, and chats down to, say, the keyword level for a paid search media campaign.

Furthermore, your CRM solution ought to include automation features. Here are a few I encourage you to consider:

Ability to have leads pay consultation fees before starting a case for them.

Custom fields that allow you to track the data most essential to your practice.

Appointment automation that integrates with your calendar system (preferably bi-directional sync).

Customizable pipelines for various client journeys.

In my view, the most essential component of a CRM is marrying front-end marketing data (i.e. channel, source, medium, campaign, etc) with back-end client data (i.e. potential client status, and most importantly, fee). Without this fundamental connection, it will prove extremely difficult to accurately and granularly measure return on investment and return on ad spend.

Perhaps the second most essential feature of a solid CRM solution is reporting. I've vetted so many feature-rich CRM solutions that fail on reporting. After all, if you aren't an excel ninja, just having the data in the system without usable reports with which to gain insights and perform analysis, is just a shiny waste of money.

I like to say that you need dashboards and reports. A dashboard should provide you with real-time data on how you are currently tracking against your goals. Reports should contain insights and analysis as to why you're tracking that way. Both dashboards and reports should have intuitive visualizations of your key performance metrics (i.e. cost per lead vs. target cost per lead, cost per client vs. target cost per client, ROI vs. target ROI, etc).

Ideally, all of your lead tracking tools have a native Google Analytics (GA) integration. With proper configuration, you should be able to analyze extremely detailed information about how potential clients are finding you and which marketing and advertising expenditures are delivering the most value defined in terms of income for your firm.

Tracking Parameters

UTMs are a powerful lead tracking tool that can help you get the most out of your CRM. By adding parameters to your URLs, you're able to pass detailed information about your various advertising and marketing campaigns. For example, one version of a paid search landing page might be converting a lot of leads, while a different version is converting less leads, but at a lower cost per lead. Another example is comparing campaign performance on different channels like email and YouTube ads. It is with this sophisticated approach to tracking and analyzing campaign performance that your competitors are able to deploy resources faster and more efficiently.

When a user clicks a parameter-modified link, that data can be passed to GA and your CRM solution. Now that campaign data is married to your lead and client records.

There are five common parameters that you should be adding to your URLs:

utm_source: Identify the advertiser, site, publication, etc. that is sending traffic to your property, for example: google, newsletter4, billboard.

utm_medium: The advertising or marketing medium, for example: cpc, banner, email newsletter.

utm_campaign: The individual campaign name, slogan, promo code, etc. for a product.

utm_term: Identify paid search keywords. If you're manually tagging paid keyword campaigns, you should also use utm_term to specify the keyword.

utm_content: Used to differentiate similar content, or links within the same ad. For example, if you have two call-to-action links within the same email message, you can use utm_content and set different values for each so you can tell which version is more effective.

Data & Software Caution

Additionally, and this really applies to any vendor you work with, **make sure you own all of your data and it is easily exportable.** I am regularly shocked and dismayed to see just how many vendors license a law firm's data back to them. When the time comes for the firm to make a change, the vendor holds the firm hostage and makes it much more difficult for them to make a change. Ask questions and read the terms of service. Demand that your vendors agree that your data is yours and that you will be able to export it out their system if the need may arise.

Finally, in order for your lead nurturing system to be an asset, and not a liability, it needs to be invisible. In other words, any automation built into the system must work seamlessly and authentically.

Once a potential client feels like they've entered an automated system, the system has failed. In fact, most of the law firm lead nurturing systems I review do more harm to the firm's reputation than bring in business. Even the best systems require some level of engagement from the people operating them.

Converting more potential clients to paying clients is part art and part science. The art of client service starts with listening and empathizing. There is no software solution that can replace remarkable client service. At least not yet. Eighty percent (yes, that's an arbitrary number) of your ability to earn your next client will depend on your ability to create, nurture, and solidify professional relationships and communicate how you are uniquely qualified to solve your clients life-legal issues. But to me, even though so many firms fail so hard here, that's really table stakes.

In Conclusion

The competitive advantage comes from a firm's ability to scientifically measure and adjust to feedback. It is only after building, measuring, and learning that you can iterate toward better experiences that motivate a larger percentage of your audience to inquire about your services and hire you. That's not to say that you'll win more business simply by a/b testing paid search landing pages. There are a seemingly limitless number of factors that go into potential client's hiring decision. But if you aren't measuring, you can't improve those experiences.

About the Author

Gyi Tsakalakis helps lawyers earn meaningful attention online because that's where clients are looking for them. As a lawyer himself, Gyi is familiar with the unique considerations of effectively marketing a law practice online. In 2008, Gyi founded AttorneySync to build the most trusted team in digital legal marketing. He serves as a Vice Chair on the ABA's Client Development & Marketing Committee. Gyi lives in Chicago and loves coffee. He also misses coaching football and is happy to discuss various strategies and techniques of defensive front seven play. Have a question? Don't hesitate to ask him.