Intake is one of the most critical aspects of any law firm. But far too often firms don't give the intake process the special attention it deserves. When that happens, money goes flying out the door. Marketing spend is wasted if a firm does not have a smooth intake system for converting qualified case leads into actual clients. Here are some things to consider when it comes to intake:

Hiring the right person. I believe that if everyone is responsible for doing intakes, then no one is. That is why a dedicated intake specialist should be brought on to both perform intakes, as well as to follow-up with prospective clients in order to convert them into clients. Intake is above all else a sales role, so the person doing intake should be comfortable with, and interested in, selling. I look for people who not only can sell, but who are upbeat, empathetic, and who truly enjoy helping people.

If the cost of hiring an intake coordinator is a concern, consider the investment. If having an intake coordinator on staff results in just a few more signed per week for your firm, then the cost will be an absolute bargain.

Training. Properly training an intake coordinator is really important. This training can be made easier by having a smooth and organized onboarding system. At our office we use videos to train all staff, including our intake department, and each position at our office has a manual which breaks down position-specific tasks. The better the training, the more likely the intake coordinator will be in a position to thrive (assuming of course the right person was hired).

Results. The intake coordinator should, like any other position in a law firm, have key performance indicators (or KPIs for short) they are responsible to hit. Whether the intake coordinator is expected to sign up a certain number of clients per month, or achieve a certain conversation rate, the intake coordinator needs to know what is expected of him in terms of results. That way, there is a specific and measurable goal to hit, and KPIs accomplish that. KPIs serve to hold the intake coordinator accountable.

The details. Are your intakes done in a structured and choreographed way, or are they done randomly? Systems are very important when it comes to intake. Specifically, having written scripts and processes for an intake coordinator to follow are important. The more fine-tuned your intake system becomes, the more cases you will sign-up.

Follow-up. They say the fortune is in the follow-up. Most firms give-up on leads much too quickly when they don't sign them up right away. But it's true that many clients take their time in hiring a lawyer, which means they can take days, and sometimes weeks to convert. Consistent and routine follow-up through telephone calls, as well as automated email sequences can dramatically increase the number of leads that turn into clients. At my office, we stay in touch with those that have not yet signed, until they either sign, or tell us to stop contacting them. The latter almost never happens.

I encourage you to give serious thought to the way intakes are handled at your firm so that more and more potential leads turn into clients for your firm.