June 23, 2022
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Customer Relationship Management Systems Can Help You Bring in New Clients and Retain Your Current Clients

By Christopher Earley

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In God we trust. All others must bring data.—W. Edwards Deming

Customer relationship management, or CRM, is a powerful weapon you can deploy in your law firm. A CRM is a tool to organize, segment, and communicate with your database of contacts in a very focused and intentional way. If you are not already using and leveraging the robust horsepower a CRM provides, then your firm is missing out. There are many different CRMs available, but I have found that you generally get what you pay for when it comes to this technology. Below are some things a CRM can do that can seriously help a law firm to operate effectively and grow.

Segmentation

A CRM allows my firm to powerfully segment our email database. For example, we can "tag" people as Spanish- or English-speaking so that they receive the correct emails. Additionally, we can "tag" people that have had a car accident, so that they receive different emails, with different content, than someone who has been involved in a slip-and-fall accident. The tighter you can segment your email list, the more effectively you can communicate with these contacts and provide them with the information that will benefit them.

Blast Emails

Each week we send out a blast email to our master list of former as well as current clients, along with referring attorneys. If you don't already do this in your firm, I highly encourage it. We put great thought and attention into the subject line and the body of the email. A CRM can give you critical data such as email open rates and well as who clicked on any links contained in the emai This data and the reports it generates allow us to tweak and adjust our weekly email so that not only do the emails get opened, but they also get read. Other important information a CRM can provide is a list of people who have unsubscribed, as well as which email addresses are no longe valid so that those email addresses can be scrubbed from our list.

Nurturing Prospective Clients

We rely heavily on automation to nurture potential clients. Sometimes a prospective client calls and is on the fence about hiring a lawyer. Too many firms fail to follow up with the lead. It is said that the fortune is in the follow-up, and a CRM email sequence can really move the needle on helping to convert leads into clients. When any new potential client contacts us via phone or cha service, we make sure to capture the person's email address and begin sending out drip emails t that person through our CRM. These emails are spaced a few days apart from one another and always provide educational content such as a free book, free report, answers to FAQs, and other content we believe will be useful to the person. These emails go out as far as a year because som people take that long to decide to hire an attorney for a legal problem. As with the blast email, w can see which emails get opened, so we can test and tinker in order to optimize these automate emails.

Updating Current Clients

As with drip emails that nurture prospective clients, we can leverage automation and let the CR do all the work for us by emailing out information that answers the general questions that are swirling in most of, if not all of, our clients' heads. This makes the clients happy because they receive this additional layer of communication from us. Plus, this automated communication helps because we don't have to make as many phone calls or compose as many emails as we needed to do before we started using a CRM. These emails can contain links to blog posts, answers to FAQs, information about you and your team, and anything else that will provide valu to your clients.

Automating Tasks

Besides email automation, other tasks can also be automated through a CRM. You can set up email reminders to send a "shock-and-awe" package to a potential client who, for example, has already received a few of our automated emails but has not yet signed a fee agreement. Or, whe new client signs and is assigned a "tag" to receive a set of emails, we can set a reminder task notification to send to the new client a handwritten thank-you card welcoming the client to our firm.

A CRM is a crucial and powerful tool that all law firms should use to effectively organize and communicate with their database of contacts. If you have any questions or feedback regarding CRMs, I would love to hear from you. Please email me at cearley@chrisearley.com.

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