Published on *The National Law Review* https://natlawreview.com

A Lawyers Spring Cleaning Guide to Decluttering the Intake Process

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Spring is upon us and what better time than now for lawyers to clean up a process that can sometimes get messy — the client intake process. Client intake is a pivotal step in converting those hard-earned leads to customers and can leave a lasting impression on your law firm. It's important to periodically look at what is and is not working in your own firm's intake process.

Prospective clients will be evaluating your professionalism, skill, personality, and customer service from this moment forward. Not only is it important for lawyers to ask the right questions so they may decide on the best approach to a case, but lawyers additionally need to consider the client experience.

Your prospective client is also interviewing you, wasting time shuffling through paperwork or unorganized files looks unprofessional and could be the difference in winning over that client or not. Keeping this in mind, don't waste the client's time with a slow intake process. A streamlined, clutter-free client intake is a win-win, let's go over some tips in this guide.

Ask yourself the right questions

When thinking about client intake, lawyers should think about themselves first. It may be an odd concept but it will ultimately save you and the client time. The key is to ask enough screening questions to evaluate if the client will be a good fit. To do this, lawyers need to determine their ideal client and have a good understanding of the services their firm can realistically offer.

When evaluating what questions to ask the client, lawyers should consider the following:

1. What key information do I need for this case?
2. What is my timeframe?
3. What type of cases can I take on?
4. Are there other recommendations I can make if I can't assist the client?

The answers to these questions will be different for each lawyer but they should get you thinking about what information you will need during client intake. Clients will appreciate lawyers who have a firm understanding of their capabilities and services instead of stretching the truth just to sign a client on board.

Automate your client intake

The easiest way to clean up your client intake is to streamline it with automated forms. Automated forms allow lawyers and their team to easily access and distribute forms to the client without having to jump on the phone or come into the office. This is even more important now that virtual or hybrid offices are here to stay.

Platforms like PracticePanther allow lawyers to create customizable client intake templates that are easily interchangeable and responsive. Implementing automated forms will:

Reduce non-billable hours

Client intake can be time-consuming for busy lawyers. Allowing clients to independently fill out their information will save you time and resources that could be allocated towards managing other aspects of your practice.

Eliminate human error

If your firm is using a paper client intake form or filling out the form on behalf of the client, mistakes can be made. This isn't to say that you or your team are doing poor work – human error is sometimes inevitable. Transitioning away from paper to an automated form will greatly reduce the potential for human error and increase data accuracy.

Improve the client experience

Accessibility is an important aspect of the client experience. Having the option for the client to fill out the form anytime, anywhere will increase the likelihood they will complete it and in a timely manner. PracticePanther forms were made with this in mind and can be used across all mobile devices.

Provide multiple client intake funnels

Your firm's marketing strategy should always include multiple client intake funnels. This will increase your online visibility to prospective clients and offer them options to choose platforms they are comfortable with. Whether a potential client is coming from social media, landing pages, ads, or a review website, the intake process should be uniform.

Taking this into account, it's important to ensure all members of your team are familiar with the intake process and have easy access to the proper forms. Client intake should be a team effort (if your firm is large enough to handle it) especially when prospective clients can come from any platform, at any time. If you operate a solo firm, automating client intake through multiple channels ensures that customer service doesn't suffer.

Keep it simple

If there’s one thing lawyers want more of, it’s time. Adopting processes and software that offer a “set it and forget it” approach will allow lawyers to focus their time on assisting clients. By using this guide, you’ll be on your way to a tidy intake of clients for seasons to come.

National Law Review, Volume XI, Number 97