Client Intake with CosmoLex Websites

To grow your firm, your client intake process should make a good impression on your clients. But it should also run smoothly, keeping



But there can be a huge disconnect between the tasks that need to get done and the tools you're using to do them. Without the right workflow, prospective clients and data can fall through the cracks.

It's time to streamline your client intake process. With CosmoLex Websites, you can establish an effortless workflow that turns leads into clients in just seven steps.



Build a marketing strategy that starts with your website.

Your website can reach more prospects thanks to built-in marketing features like SEO, social media, and online ads.

Make it easy for leads to reach out.

A personalized website design creates clear channels of communication. Prospects can reach you through integrated contact forms, your phone number, or email. From there, the data can directly flow into your CosmoLex practice management suite.



Automate responses through email or text.

With CosmoLex, you can automate text messages or emails that reply to prospects as soon as they hit the "submit" button on a contact form—fostering strong relationships from the start.

Qualify leads with intelligent intake forms.

A smart, personalized intake form can be a powerful asset for your intake process. Instead of wasting time chasing down leads that aren't the right fit, you can filter out the ones who are most likely to qualify (and be more profitable).

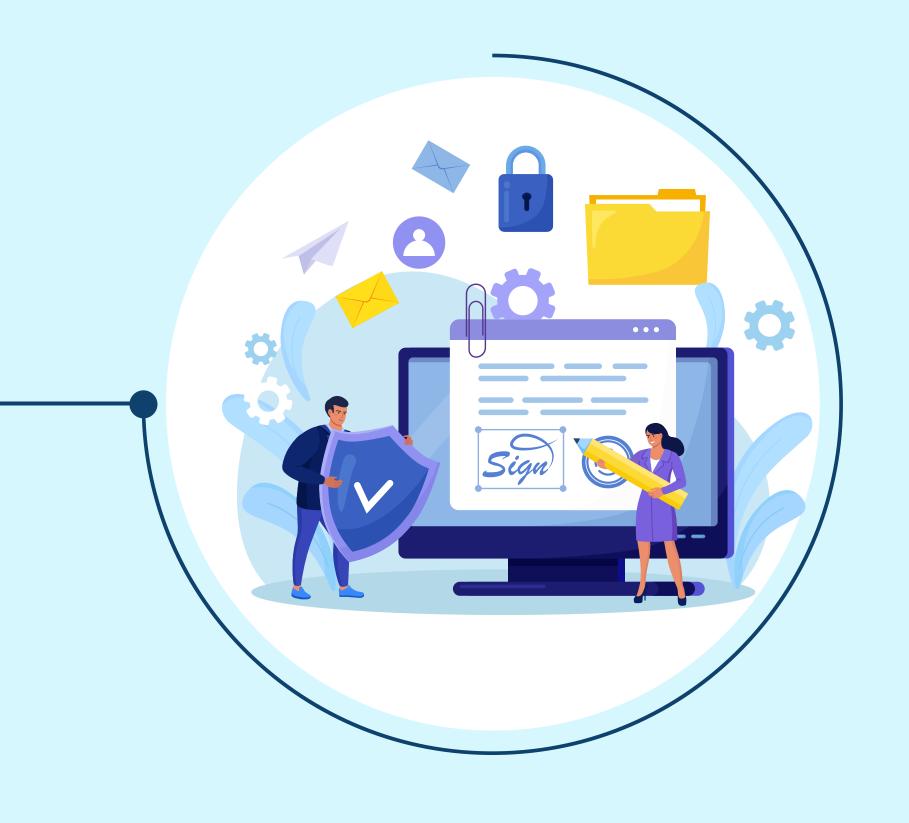


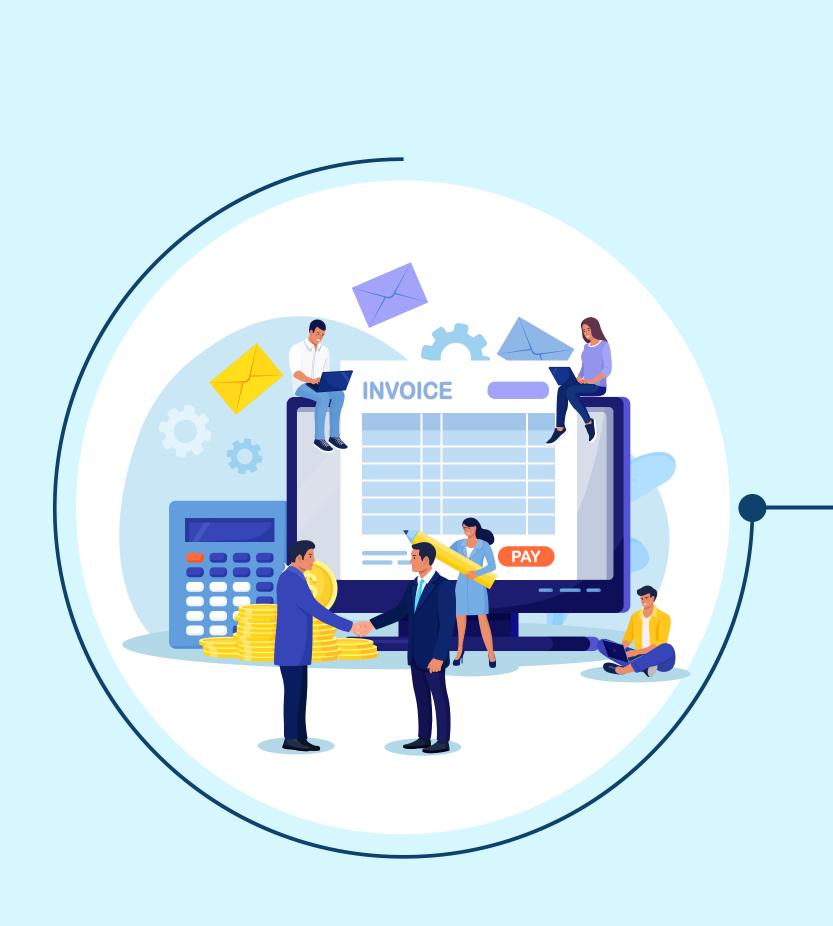
Take the delay out of scheduling.

Don't leave qualified leads hanging! Seamlessly send them a link to your calendaring tool, where they can conveniently pick a meeting time that best works for their schedule.

Complete the intake process.

Your legal client relationship management tool allows you to send secure file-sharing requests and get eSignatures, so you can make things official with your new client.





Build strong relationships with client-centered service.

Retaining clients is just as important as gaining them. Use tools available on your website, like client portal access or online payment links, to keep clients engaged and happy.

CosmoLex's new website tools give law firms a leg up when it comes to client intake, with smart integration that ensures everything flows seamlessly from your website

Schedule a demo to see how CosmoLex Websites can transform the way you find and convert leads to clients.

into your practice management software.

