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# **Personal Injury Law Firm Optimizes Lead Management and Client Intake with Law Ruler**

# Executive summary



## Mission

Develop a structured client intake process and streamline lead management at a personal injury law firm using comprehensive legal CRM software.



## Challenge

Establish a client intake department to optimize lead management and reduce non-billable attorney hours spent on ineligible leads.



## Roadblocks

- The law firm had no intake department or referral mechanisms.
- Attorneys wasted non-billable hours following up with ineligible leads.
- An existing marketing company provided inadequate leads and poor lead quality.
- Their old CRM solution was insufficient for end-to-end lead management.



## Solution

Using Law Ruler's CRM and client intake solutions, the law firm established an intake department, implemented a referral mechanism, and optimized non-billable attorney hours.



## Benefits

- The firm was able to build a new intake department to vet incoming leads
- Prospective leads and converting leads have increased
- Tracking and managing leads have become streamlined and efficient
- The firm's "speed to lead" has increased significantly
- Freed up time for both attorneys and intake coordinator



## The challenge

### **Implementing a client intake process and optimizing lead management while also reducing non-billable attorney hours spent on ineligible leads**

Recognized nationwide for the complexity of the matters they take on, The Becker Law Firm has been helping clients with medical malpractice and catastrophic injury claims for over four years.

During this time, they used various CRM and marketing solutions to handle lead management, but they needed a better solution to help with lead quality and quantity, not to mention efficiently managing leads. A fragmented intake process meant many non-billable hours were wasted on unqualified leads.

“Before Law Ruler, we didn’t have a great intake process.,” said The Becker Law Firm’s intake coordinator, Jackie Smith.

Since The Becker Law Firm operates on a contingency basis, attorneys were wasting non-billable hours consulting with leads that they couldn't help. They also had no mechanism to manage their referrals, though they referred out three or four cases per week for a fee.

These challenges inevitably impacted the firm's revenue. To help spur growth, The Becker Law Firm began to run ad campaigns in 2018 to increase lead generation. They expected to see a higher volume of leads, and their existing CRM platform was being discontinued.

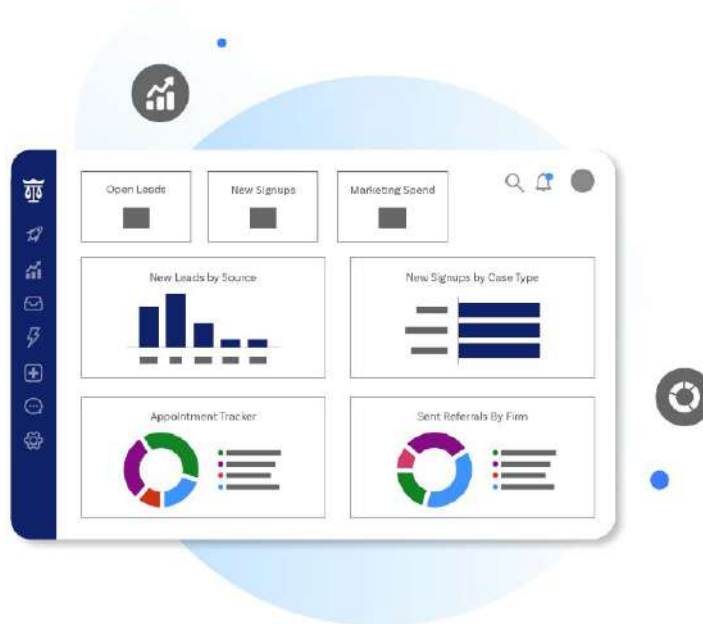
The firm recognized it was time for a new—and much more robust—CRM solution.

“

**[Law Ruler] makes me organized and good at my job. It allows us to manage all the leads and our referral program, plus we can track all of our referral sources. That kind of management of leads is critical.**

**—Jackie Smith**  
**THE BECKER LAW FIRM**





## The solution

### Robust lead management and client intake process implementation through Law Ruler

Because of its fast-paced day-to-day operations, The Becker Law Firm required a CRM solution they could implement immediately. The software also had to be simple to use so anyone on the team could easily navigate the platform.

“It just needed to work quickly and [be easy enough] for anyone to sit in front of [it] and be able to figure it out,” said Smith.

The firm researched and tried several CRM software solutions on the market. Law Ruler’s CRM stood out for its easy implementation, robust features, and intuitive dashboard, making it the clear favorite.

Besides its CRM feature, Law Ruler also offers client intake solutions. With these solutions, the Law Ruler team helped The Becker Law Firm establish a new client intake department with Smith as its coordinator.

“

**[Law Ruler’s] customer support is better than any vendor we’ve ever used. And it’s just nice to have that partner.”**

**—Jackie Smith**

**THE BECKER LAW FIRM**

Because of the increase in leads with Law Ruler, they recently hired two team members for support. All team members were effortlessly trained in using the software, allowing them to optimize the intake process and lead management.

Finally, Law Ruler also helped The Becker Law Firm set up a campaign that follows up with referrals automatically, keeping Smith in the loop with an email notification—all at a more affordable price than other options.

Smith loves the superior customer support the firm receives with Law Ruler throughout these processes. “Their customer support is better than any vendor we’ve ever used,” she said. “And it’s just nice to have that partner.”





## The results

Since using Law Ruler, The Becker Law Firm's leads have increased from 466%. Unlike previous solutions, Law Ruler's lead organization features allow the firm to easily keep track of all cases via a system of customizable fields, tags, color codes, and inbox filters.

"We wouldn't be able to manage that many leads without Law Ruler," Smith said. "Some leads go through many steps to either qualify or disqualify, and it seems impossible to keep track of them without Law Ruler. When you're an intake person, you have Law Ruler open every minute of the day, and you're making sure that all the fields are complete and your colors are the way they should be. And if a boss happens by and wants to know what's happening in intake, all the recent lead details are available at a glance to have a conversation about it."



**Increased leads by 466%**



**Easily keep track of all cases**

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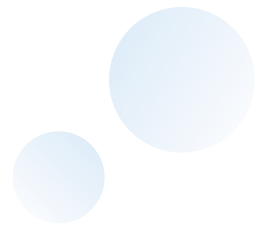
—Jackie Smith

THE BECKER LAW FIRM

The Becker Law Firm also decreased its speed to lead by integrating all lead sources including its website chatbots.

Their team can now respond immediately to all leads during business hours. Furthermore, with Law Ruler's assistance, the intake department created a list of standard responses to send ineligible cases. Instead of spending 20 minutes on the phone, intake can send a text to decline certain cases.

Finally, Law Ruler allowed The Becker Law Firm to optimize its referral system.





“With Law Ruler, we can identify different types of cases that come in and where they come from, so we can see what kinds of cases are coming from where. This helps us better send out referrals,” Smith explained. “And the wonderful thing is, the attorneys have almost no involvement in handling outbound referrals or unqualified leads. The attorneys are very pleased that the high volume of leads is well-handled by our qualified team. I’m really proud of that fact and proud of our team. And Law Ruler allows our team to be this successful.”

These features significantly reduced the intake department’s time spent on non-revenue-driving activities. Attorneys also no longer waste time speaking with clients they cannot represent or refer, allowing them to focus on revenue-generating, billable tasks.

Smith stated, “We’ve gone to almost zero attorney contact with people we can’t help. And that was not something that we did pre-Law Ruler.”

With these improvements, The Becker Law Firm has enjoyed unprecedented growth, efficiency, and profitability. Additionally, Smith can now take a vacation. When asked how she felt about Law Ruler, she replied: “It’s been a game changer. I love it.”



**Decreased speed to lead by integrating all lead sources**



**List of standard responses to ineligible cases**



**Optimized referral system with almost no attorney involvement for unqualified leads**



## About Becker Law Firm

The Becker Law Firm is a medical malpractice law firm serving the Cleveland, Ohio, community since 1979.

Founded by Attorney Michael Becker, Becker Law provides high-quality catastrophic personal injury services for even the most challenging cases. With a proven track record of positive outcomes, its experienced team of personal injury lawyers use their expertise in fighting to bring full justice to families who suffer life-altering injuries or wrongful death due to negligence.



## About Law Ruler

Law Ruler is a leading legal software solution that helps law practices transform how they manage leads, prospects, and clients. It aims to enable success at every law firm by providing expert consulting and world-class software solutions, including:

- Legal CRM
- Client intake
- Marketing automation
- Marketing and intake analytics
- Integrations

Law Ruler benefits law firms that want to grow, no matter the practice area. For more information, call (866) 603-5233, email [info@lawruler.com](mailto:info@lawruler.com), or visit [lawruler.com](http://lawruler.com).