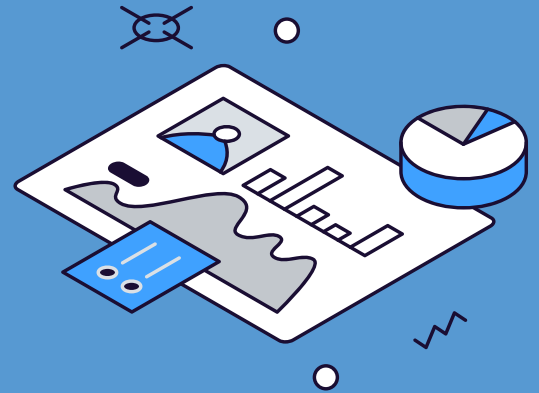


# Disability & SSDI Law Firm Rapidly Expands to Serve 20,000+ Clients with Law Ruler



## Mission

Streamline client intake and the lead management pipeline to expand nationwide with a comprehensive platform that offered automated, scalable solutions to support the firm's growth.



## Challenge

Minimize costs and reduce non-billable time spent nurturing leads for conversion with integrated automation tools for lead qualification, management, and client intake.



## Solution

Using the Law Ruler CRM and client intake platform, the firm optimized lead management, intake, and marketing processes with automation to maximize billable time and rapidly expand the firm to 20,000+ clients nationwide.

Tabak Law provides award-winning legal representation for national clients in Social Security, veteran disability, and workers' compensation cases, but the firm was previously using a patchwork CRM and client intake system with multiple platforms to get the functionality they needed to serve their clients. This approach was time-consuming, limited growth potential, and created inefficiencies in their lead management and client intake processes.

After years of manually linking together what Tabak Law partner and attorney Alex E. Eichhorn called a "Frankenstein CRM," the firm sought a more comprehensive solution like Law Ruler.

***"We were using the Crocodile CRM, and for intake, we were using an Excel document linked with PhoneBurner for automated calling and voicemails. Things were all done separately."*** — Alex E. Eichhorn, Partner/Attorney

This disconnection led to a nightmare scenario unfolding for Tabak Law when an intake coordinator's mistake cost the firm tens of thousands in lost leads—convincing the team it was time to seek out a better solution for lead management and intake.

***"One incident made us make the decision to change to Law Ruler. One intaker marked 800 leads as rejected...at \$30 each, it was devastating. We determined that wasn't a viable means anymore."***

Transitioning to Law Ruler's comprehensive CRM and client intake platform gave the firm more functionality than its previous patchwork approach and made a measurable impact on the firm's ability to scale and grow, minimize costs, increase efficiency, and sign more cases nationwide.

## Minimized Costs with an Integrated CRM & Intake Solution

In the search for an integrated solution, Tabak Law first considered the Litify CRM. But after discovering major issues with costs, integrations, and functionality, they chose Law Ruler's comprehensive platform to bundle their CRM and client intake software at a fraction of the cost.

***“My partner, Lauren, and I spearheaded the decision to transition our CRM. We flew out to New York, looked at Litify, and spent three days looking at their systems. The integration costs were about 10X of Law Ruler. There were not many pros, if any, to going the Salesforce route rather than Law Ruler.”***

The firm discovered other platforms would also require them to employ a costly Salesforce engineer to manage multiple integrations and get the functionality they sought, while Law Ruler provides an all-in-one solution with fully-managed systems.

***“If you do go the Litify route, you almost 100% need to hire a Salesforce engineer—\$200,000 of additional costs. We realized that Litify was not a realistic solution. Law Ruler ended up being the clear choice for us.”***

## Helped the Firm Grow to 20,000+ Clients Nationwide

Eichhorn credits Law Ruler for the efficient, scalable operations that have created a framework to support the rapid, nationwide growth they're now experiencing.

***“We rapidly expanded from handling a few thousand SSD clients nationwide to 20,000+ clients. Without a solution like Law Ruler that allows us to have our hands off and reminds us of the task, there's no way we could do it.”***

With nearly 600,000 leads being processed through their system today, Law Ruler's CRM and intake solutions are cornerstones in the firm's ability to scale and grow nationwide.

## Increased Intake & Lead Management Efficiency

With Law Ruler, the firm has significantly increased the efficiency of their client intake and lead management processes. Automated texts, phone calls, and email follow-ups have been key factors in streamlining operations for Tabak Law.

***“It's nice to believe if you put a sticky note on your desk to call this client in three weeks, that you're going to do it. But you've got 700 sticky notes on your desk and not one of them gets managed. With Law Ruler, you set a task and it can go to the entire team. Things don't fall through the cracks.”***

The firm's previous solutions were time-consuming and inefficient—both reasons why they sought out an integrated platform like Law Ruler to streamline their processes and service more clients.

***“You would have to take leads from our CRM, export as a CSV file, and import them into PhoneBurner. From there, you'd have to select the call pattern and manually leave voicemails. Emails and texts were not integrated. It was very ineffective.”***

An efficient, optimized client intake process with automation is saving the firm thousands of hours annually and helping Tabak Law's attorneys win back billable time.

***“It saves us a ton of time. When I first started at the firm 15 years ago, I was doing the client screening and it's not a good use of attorney time. Now, we are able to do intake and consistently get a determination of whether or not we can help a client.”***

## Drove 40% Increase in Qualified Lead Responses

Law Ruler's lead management solutions have helped Tabak Law generate more qualified leads across the nation while increasing the firm's lead response rate by an estimated 40%.

***“We have automations set when a certain status is triggered. It used to be a nightmare—get the person on the phone, mail them something, and get it back in the mail 55% of the time. Now, we get about 95% of our reconsiderations back. That saves us thousands of hours a year.”***

With the help of Law Ruler's automated follow-up texts, calls, and emails, the firm is growing by connecting with more qualified leads and signing more clients than ever.

***“The automated follow-up has to be [the most impactful thing] about using Law Ruler. The rate of clients we sign is dramatically higher.”***

## A Cost-Effective, Comprehensive Solution

Eichhorn believes the Law Ruler CRM and client intake platform is a smart, cost-effective solution for law firms of all sizes who want to grow, streamline their processes, and do it for an affordable cost.

“It’s 100% essential, even if you’re small. The thing with Law Ruler pricing: if you’re small, you pay less. It’s relatively inexpensive for the sanctity of knowing that clients aren’t hitting the floor.”

Praising Law Ruler’s responsiveness and comprehensive support, Eichhorn believes this platform is an enduring solution for Tabak Law and other firms who aim to scale and grow.

“I’ve referred quite a few clients now. We’ll continue to use Law Ruler and don’t have any plans of going anywhere else.”



## About Tabak Law

Tabak Law has been serving clients with Social Security, Veteran’s Disability, and Worker’s Compensation legal services in the Greater Milwaukee, Wisconsin area and nationwide since 2010. With a reputation as experts in SSI, SSDI, veteran’s benefits, and worker’s compensation law, this award-winning firm is focused on continuing to expand and help clients nationwide get the benefits they deserve.



## About Law Ruler

Law Ruler is a leading legal CRM and client intake platform that helps law firms of all sizes and practice areas optimize lead management, client onboarding and intake, and marketing processes for optimal efficiency and scalable growth. Schedule a demo to learn more about how Law Ruler can benefit your practice.



[Schedule a Demo](#)