CIS – The Solution for Legal Client Intake

The Problem:

Law firms attract many potential clients. There are some great cases, quite a few marginal cases, and a lot of bad cases. How does the firm determine which clients to sign, which clients to refer, and which clients to reject? And how can it be done quickly and efficiently?

The Goal:

We want to end up with clients in three categories:

- Great cases that the firm will handle
- Marginal cases that the firm will refer out, and share in the revenue.
- Poor cases which the firm will reject.

The Status Quo:

Manual client intake. Leads come in from a variety of sources. Staff performs follow-ups, takes notes. Cases of interest land on the appropriate attorney's desk.

Problems with the Status Quo:

- Slow response time
- Cases get lost in the process
- "I'm not responsible. I thought you were handling that!"
- Information not available – stuck in someone's e-mail box.

The Solution:

CIS (Client Intake System) puts powerful workflow tools in place to streamline and speed up the intake process.

CIS is a web-based system that automates the client intake process, from the initial client contact (via web or your call center) to your decision to sign, refer, or reject the potential client.

Key Benefits

CIS is Comprehensive

- CIS is a central, unified system for all client intakes. It supports both web sites and call centers.

CIS Increases Your Profits

- CIS enables quick response time for hot leads, helping you beat the competition to sign up the most lucrative clients.
- CIS automates the referral process, maximizing the revenue from cases that you choose not to handle internally.
- CIS enables you to measure the effectiveness of your different marketing efforts.

CIS Enforces Accountability

- Every potential client is assigned to an individual, but is easily transferred to someone else
- Every activity is logged

CIS Enables You to Track Your Marketing

- Live, on-line statistics let you measure the effectiveness of your different marketing efforts.
- View up-to-the-minute summaries of impressions, responses, and resolutions of the cases attracted by your different marketing efforts.
- Drill down to specific date ranges to pinpoint your results.

CIS is Flexible

- Intake forms can be brief or detailed, and multiple, custom forms can be created for specific areas of practice.
- CIS is a web-based system; this allows your staff to access key information from any location

CIS is Secure

- Data is secured in our state-of-the-art data center, communication is encrypted and protected

CIS Requires No New Equipment or Software

- As a web-based system, it runs in your existing web browser. No software to install.
- It runs on the servers in our secure data center, so you don't have to purchase expensive servers.

CIS is Scalable

- Add or remove staff members? CIS can support the changes immediately.
- Pay only for the users you have each month.

CIS is Affordable

- No expensive hardware or software to buy, just a reasonable one-time setup fee and a monthly service charge.

Key Features

Feature – Unified Client Intake

CIS automatically captures the responses to the various intake and "contact us" forms on your firm's web sites. When the potential client submits the form, it is immediately available for review and action by members of your firm.

CIS serves as an intake console for your phone center. Phone reps select the appropriate intake form for a particular client's situation, and are guided by the questions on the form. Once the form is submitted, it is immediately available for review and action by members of your firm.

Feature – Immediate Notification

When a lead comes in, the right individuals in your firm get immediate notification that a potential client needs their attention. They can quickly review the submitted information, and determine whether to contact the client or refer him to someone else.

Feature – Referral System

CIS automates the entire referral process, and tracks each referral from initial contact with the external firm to the ultimate conclusion of the case.

- Your staff member uses CIS to put a case out for review. He chooses how much information to share with the external firm, keeping key details private until a referral agreement has been reached.
- Your staff can set a deadline for response from the external firm. Reminders can be sent to make sure the response comes in a timely manner.
- After a referral is accepted, you can use CIS to request a status update from the external firm. The response is automatically logged and is visible to both firms.
- CIS tracks the status of all referred cases, allowing you to see which have been closed and which still have referral fees pending.

Feature – Unified Potential Client Log

CIS centralizes the record of all contact and analysis of a potential client. There is no need to hunt through your firm to determine which staff member possesses key information that's needed to make a quick decision.

- Every activity related to the potential client's case is recorded, including the date and time of the activity and the name of the staff member who performed it.
- The log can be searched and filtered to let you pinpoint key information.

Feature – Automated Form Letters

CIS maintains a library of form letters for routine correspondence with potential clients.

- These letters can be sent via e-mail or printed and sent by hand.
- Electronic letterhead duplicates the look of your firm's existing correspondence and preserves a professional look.
- Form letters can be customized as needed before they are sent.
- A record of each letter is attached to the potential client's log, allowing correspondence to be tracked as needed.

Feature – Integrated Question and Answer

CIS organizes the process of gathering information about the potential client's case. The system enables your staff to ask questions of the client and of other staff members.

- Questions and Answers are processed through the system, and are logged and available to your staff. Deadlines can be assigned to questions, and reminders can be generated to trigger timely responses.
- A permanent record of all questions and answers is created – no need to track down a certain staff member.

Feature – Notes and Documents

CIS makes available all notes and documents pertaining to each potential client.

- Notes and documents are attached to the potential client's file, and are instantly available for review by your staff.