



The Modern, Highly Efficient, Law Firm Intake Strategy

THE MODERN, HIGHLY EFFICIENT, LAW FIRM INTAKE STRATEGY

Generating Cases is Like Generating Oxygen for Your Firm

Just as oxygen is essential for sustaining life, a continuous influx of cases is crucial for the vitality and growth of your legal firm. Without new cases, the firm can stagnate and lose its competitive edge. By consistently attracting and securing new cases, a firm ensures its longevity, financial health, and ability to thrive in a competitive market. This constant flow of work not only keeps your firm operational but also drives its reputation and success.

WHEN TO EVALUATE YOUR INTAKE SYSTEM

- 01 Cases slipping through the cracks
- 02 Difficulties with staffing at your firm
- 03 Desire to reclaim personal time on nights and weekends
- 04 Frustration with following up with leads
- 05 Inefficiencies in intake processes conducted by the wrong individuals
- 06 High turnover in reception and intake roles
- 07 Ambitions to grow your firm



Unlock Potential

Discover the strategies that can increase the profitability of your firm by optimizing how you handle leads both during the day AND at night. This is applicable to all areas of law, not just personal injury



Maximize Efficiency and Conversion Rate

Gain insights into how to streamline your intake process, enabling it to operate continuously, freeing you to concentrate on core activities



Enhance productivity

Discover how reducing phone duties can lead to more case sign-ups and contribute to a happier, more productive team



Proven Success

I will share insights from our experience of successfully signing over 3475 cases in less than two years, underscoring the practical effectiveness of these methods across diverse legal fields

However, note the following:

1. Realistic Goals:

Learn actionable strategies to enhance your firm's intake process. Results may vary based on different factors

2. No Quick Fixes:

Sustainable improvements require time and commitment.

3. Effort Required:

Success depends on your active participation and willingness to adapt these methods.

4. Continual learning:

Stay adaptable as best practices in legal intake evolve

THE GENESIS OF THE HIGH-LEVEL INTAKE SYSTEM:

03

Ethen's journey began in Philadelphia, inspired by his father, a personal injury lawyer. Fascinated by legal marketing, he majored in advertising at Penn State and furthered his interest at Drexel Law School. Ethen realized that merely having a website wasn't enough; generating cases required proactive, strategic steps. This realization laid the foundation for the high-level intake system.

Early Efforts



To manage increased referrals, the firm initially relied on an exhausting on-call process, with attorneys working 80-100 hour weeks. Recognizing the need for efficiency, Ethen explored TikTok and Facebook ads, which proved highly effective. This success led to the adoption of Litify, a platform that streamlined intake processes and improved overall efficiency.

Spillover



Case managers handling receptionist calls caused inefficiencies. Switching to virtual assistants from the Philippines resolved these issues, enhancing follow-up processes and allowing lawyers to focus on core tasks.

Turn Downs



Centralizing the turn-down process and implementing escalation protocols ensured valuable leads weren't prematurely dismissed.

Where We Are Now



Ethen Ostroff Law now boasts a team of 45 impact assistants, enabling core team members to concentrate on essential legal work. The intake process is robust, with a strong emphasis on follow-up to improve conversion rates.

24/7 Inbound Call Response

- Prioritize calls from 8 AM to 9 PM.
- Use an answering service for overnight calls if necessary.

Prompt Lead Response

- Return all new leads within 15 minutes.
- Contact leads quickly to prevent them from shopping around.

Maximize Staff Productivity

- Manage text conversations during downtime.

Relentless Follow-Up

- Ensure outbound follow-up from 8 AM to 9 PM, seven days a week.

TOOLS AND RECOMMENDATIONS

Client Relationship Management:

- Use Litify, Lawmatics, Lead Docket, or Clio Grow.

Voice Over IP:

- Services like RingCentral or Aircall are recommended.

SMS and Automation:

- Automate initial messages, but avoid over-automation.

AI Integration:

- Explore AI solutions for appointment setting and other tasks.

Additional Tools:

- **Zapier:** Connects tools and software to automate processes.
- **CallRail:** Tracks calls and integrates with CRMs.
- **eSign:** Prioritize electronic signatures.
- **Notion:** Document processes and procedures.
- **Loom:** Screen recording for training and delegation.

BEST PRACTICES

Eliminate Paper Intakes

- Digital intakes streamline processes and improve client experience.

Organize Intake Types and KPIs:

- Closers Club: Handles warm transfers and new form fills.
- Follow-Up Team: Entry-level position for chasing leads.
- Reception Team: Responsible for answering and transferring calls.
- Global KPIs: Set team-wide goals for signed cases.

Building a Spillover Strategy

- Map out responsibilities for time-sensitive tasks to ensure continuous coverage.

Night and Weekend Follow-Up:

- Be available and proactive during these times.

Status Pipeline:

- Organize leads by status (new, follow-up, on hold, under review, etc.).

Lead Scoring

- Score leads based on desirability (100, 75, 33, 0) and prioritize follow-up accordingly.

Record Calls

- Measure effectiveness and ensure quality by recording calls for training and quality assurance.

Invest in Training

- Develop training programs, including exams and weekly refresher quizzes.

Referrals and Turn Downs

- Use referrals as a release valve instead of turning down leads too quickly.

Delegation

- Delegate qualifying leads and gradually transition from closing when ready. Focus on essential tasks.

AVOID THESE MISTAKES

01

Letting leads go to voicemail.

02

Following up less than five times.

03

Having the wrong role doing intake.

04

No intake support on nights and weekends.

05

Letting leads sit on hold.

06

Blindly trusting by-the-minute services.

HOW A VIRTUAL ASSISTANT CAN TRANSFORM YOUR LAW FIRM

07

At Attorney Assistant, we call our virtual assistants Impact Assistants after they go through our rigorous recruiting process to make sure that you have the best possible people that we can place at your law firm. Impact Assistants truly make an impact and make a difference at your firm.

Delegate to Achieve More

Empowering you to focus on what truly matters, virtual assistants (VAs) can handle the time-consuming tasks that your staff doesn't have time for. At Attorney Assistant, we provide highly skilled Impact Assistants exclusively for law firms, allowing you to focus on high-impact tasks and significantly increase your firm's productivity.

Why Choose an Impact Assistant?

Impact Assistants can seamlessly manage various tasks such as lead follow-up, intake, appointment booking, live new case calls, filing, file organization, and medical record acquisition. This delegation frees up your team to focus on the core aspects of legal work that drive your firm forward.

KEY BENEFITS OF HIRING A VA

1.Enhanced Efficiency: By delegating routine tasks to a VA, your team can concentrate on more critical and strategic activities.

2.Cost-Effective: VAs provide a more affordable solution compared to hiring full-time, in-house staff, saving on benefits and overhead costs.

3.Scalable Flexibility: Easily adjust the number of hours your VA works based on your firm's current needs, offering unparalleled flexibility.

4.Global Talent Pool: Access to a diverse range of skilled professionals from around the world, ensuring you find the perfect fit for your firm.

5.Reduced Training Time: VAs come with the necessary skill sets and require minimal training, allowing for a smooth and quick integration into your team.