Do's and Don'ts of the Client Intake Process

In continuing our series on client engagement in this week's Law Business Revolution Briefing Memorandum, we are covering how your intake process (or lack thereof) affects the number of prospects—and eventually paying clients—who make it into your office each month.

Hopefully by now you have a rough list of stats compiled that tells you how effective your overall client engagement process really is (and if you missed last week's article, you can find out how to gather those stats here). But for the purpose of this lesson on client intake, I want you to grab that spreadsheet and focus on the number of prospects that called your office last week vs. the number of prospects that set up an appointment with your firm.

If you're not showing *at least* a 50 % conversion rate and preferably 75%, you need to take a closer look at how your intake is being handled.

There are 4 essential do's and donts that dictate this process and if you violate any one of these principles, you will see a direct downward impact on the number of appointments you set each month.

To ensure you are getting the absolute best results from your intake process, take some time this week to implement these principles in your own firm:

1. **DON'T be your own intake specialist!** You *must* have someone besides yourself answering the calls from prospective clients. Most people are intimidated speaking directly to an attorney and quite frankly, there are much better uses for your time. So whether you hire someone in-house or contract with a virtual intake specialist, commit to stop doing intake from now on.

2. **DO provide a detailed script to your intake specialist**- Your intake specialist should be using a script for **every phone call** which explains your services, conveys the value of your initial meeting and encourages prospects to say "yes" to coming in for an appointment. You never want your intake specialist to come up with this information on the fly, and it's up to you to write a script that will achieve those goals.

3. **DON'T discuss numbers on the intake call!** When done right, your intake specialist should NEVER have to discuss your fees on the intake call. In fact, a good intake specialist using a great script won't even need to give a price range! But, at all costs you want to ensure that the prospect doesn't feel as if you are avoiding the "how much will it cost" question or they'll flee faster than you can say boo. The only numbers that your intake specialist should have to focus on are what it will cost your prospect to NOT meet with you and the value of your initial meeting that they'll be getting free.

4. **DO follow up with prospects that don't set an appointment after the initial phone call-** Whether you send a warm letter, email or welcome packet via direct mail, this constant communication helps people on the fence eventually pick up the phone and call. Studies show that it takes up to 5 "touches" or contact with a firm for a prospect to take action—so don't give up if the prospect doesn't say "yes" right away.-

And don’t forget to track your numbers this week as you start making some of the changes I mentioned above! I want you to see with your own eyes the impact that automation and client engagement systems have on your bottom line and how simple direction in this area can change the effectiveness of your firm forever.