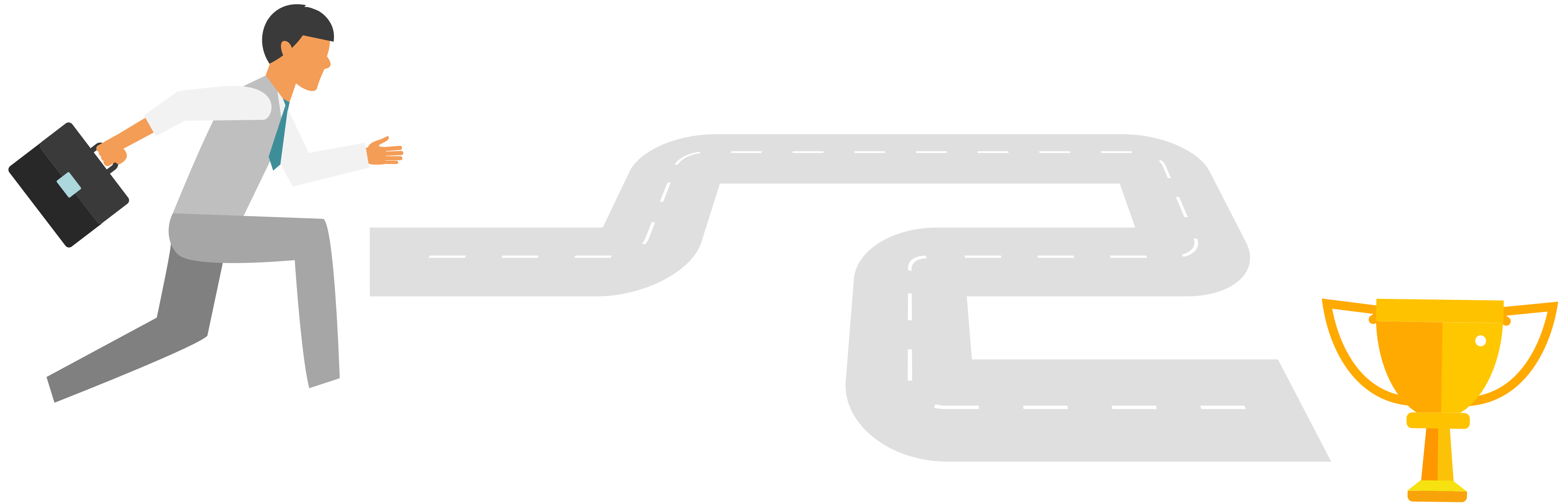


THE CLIENT JOURNEY

THE PATH TO DELIGHTENMENT



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Matt is Co-Founder and CEO of Lawmatics, the #1 attorney-client relationship management platform that provides law firms with client intake, CRM, and marketing automation. With Lawmatics, law firms win more business, impress clients, and are more efficient.

Prior to Lawmatics, Matt was Co-Founder and CEO of MyCase, a legal practice management software company which was acquired by AppFolio in 2012.



LAWYERS, NOT CEOs

RUNNING A BUSINESS IS HARD AND WASN'T TAUGHT IN LAW SCHOOL



RUNNING A BUSINESS IS HARD

MAINTAIN OFFICE

An office doesn't run itself

KEEP GROWING

Your goal is to grow your business, not stay flat

SUCCESS

Still can't forget about being a lawyer and getting great outcomes

SCHEDULING

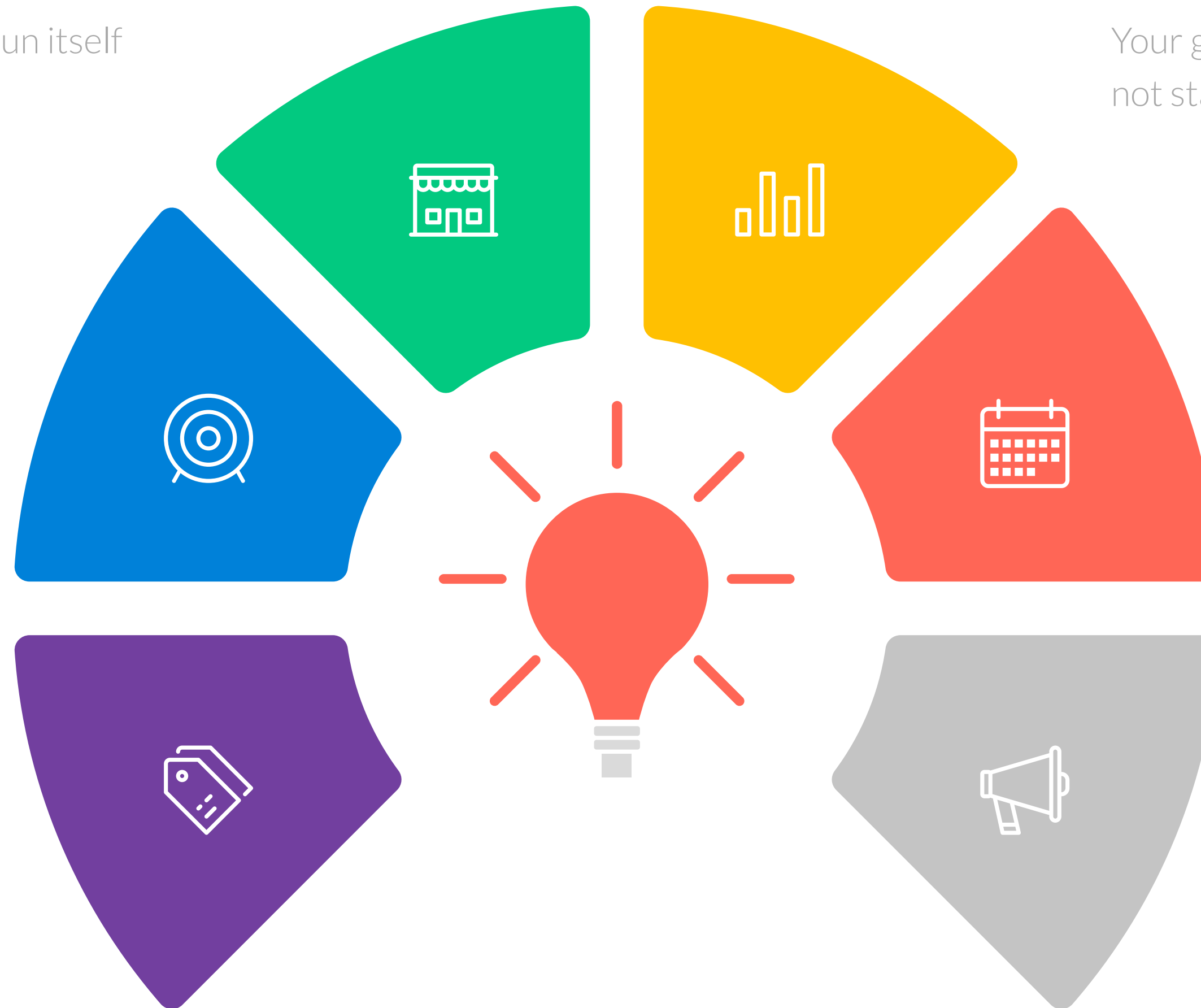
Court dates, client meetings, so much to keep track of

NEW CLIENTS

Without new clients the business will slowly die

MARKETING

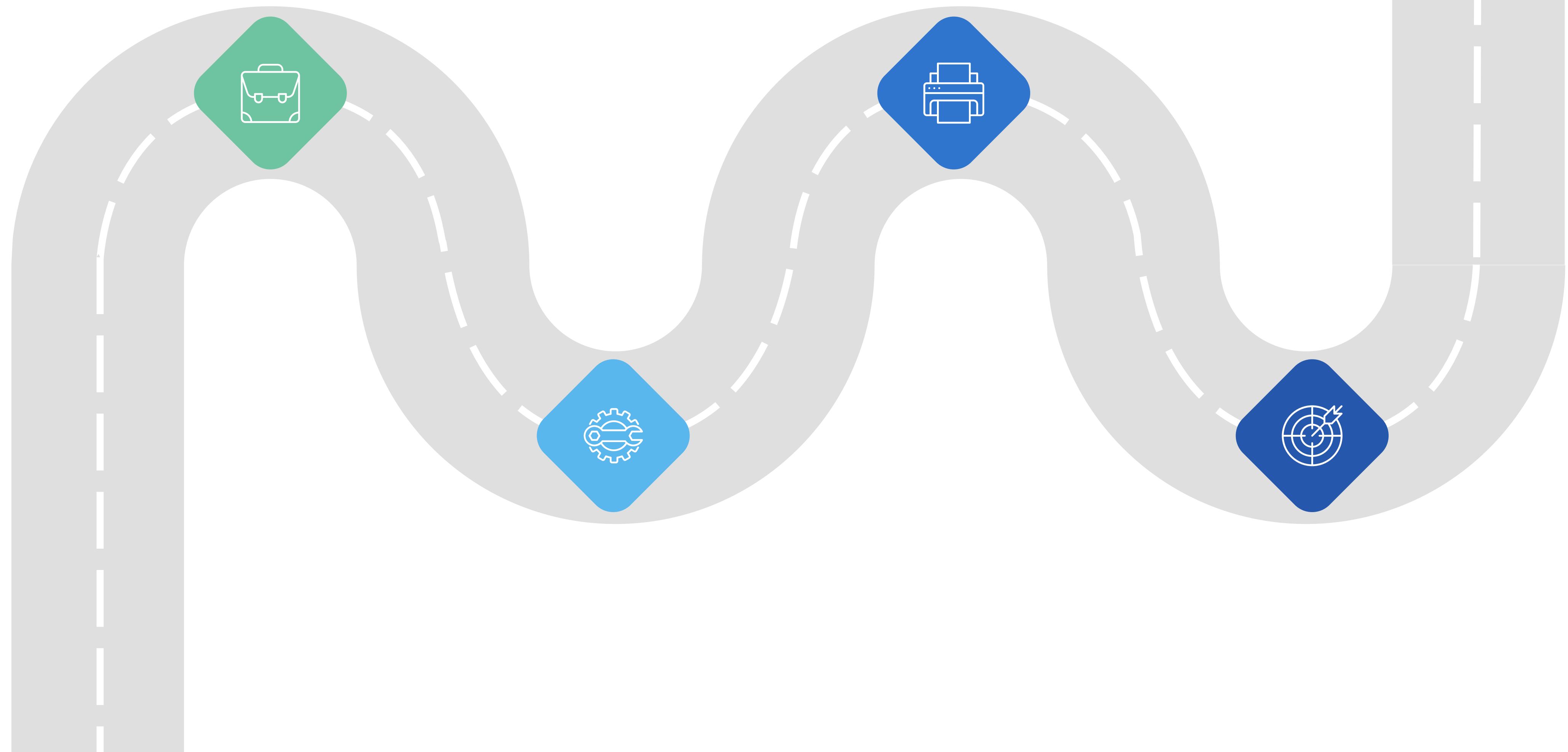
Marketing? You're telling me I also have to be a marketer?



HAPPY CLIENTS = HAPPY PRACTICE

THE CLIENT JOURNEY

Your customer's experience



EACH STAGE IS AN OPPORTUNITY TO DELIGHT

THE CLIENT JOURNEY

3 Phases of Client Journey



01

INTAKE

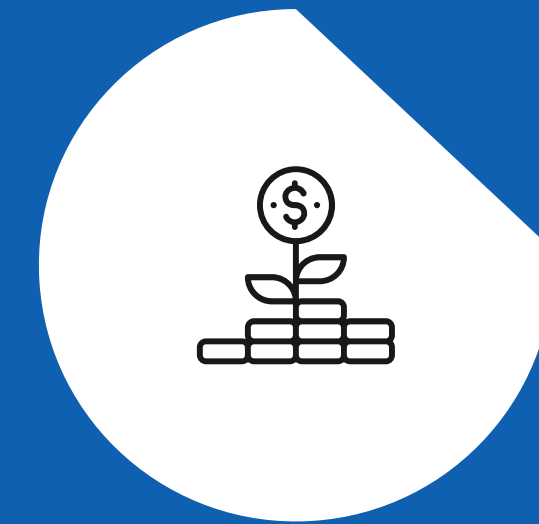
From the moment a lead contacts your firm to the signing of the fee agreement and payment of initial fees



02

ACTIVE MATTER

You have retained the new client and now have an active matter, a defined scope of service.



03

FORMER CLIENT

The matter is over and this client is now a former client, a source of good reviews and referrals.

PHASE 1 – CLIENT INTAKE

HELLO, I'D LIKE TO TALK TO YOU ABOUT MY CASE

IMMEDIATE ENGAGEMENT

Don't give them a reason to call the next lawyer on google

ITS ON FROM HELLO

You have an opportunity to give excellent customer service from the very moment a PNC contacts your firm

FIRST IMPRESSION

Showing a potential client rapid response indicates them how you will communicate during their matter

AUTOMATION IS KEY

No one can engage rapidly enough without automation

PHASE 2 – ACTIVE MATTER

THE OUTCOME IS ONLY PART OF THE EXPERIENCE

- **MORE THAN JUST A MATTER**

They hired you to represent them zealously but it isn't only about that

- **COMMUNICATION**

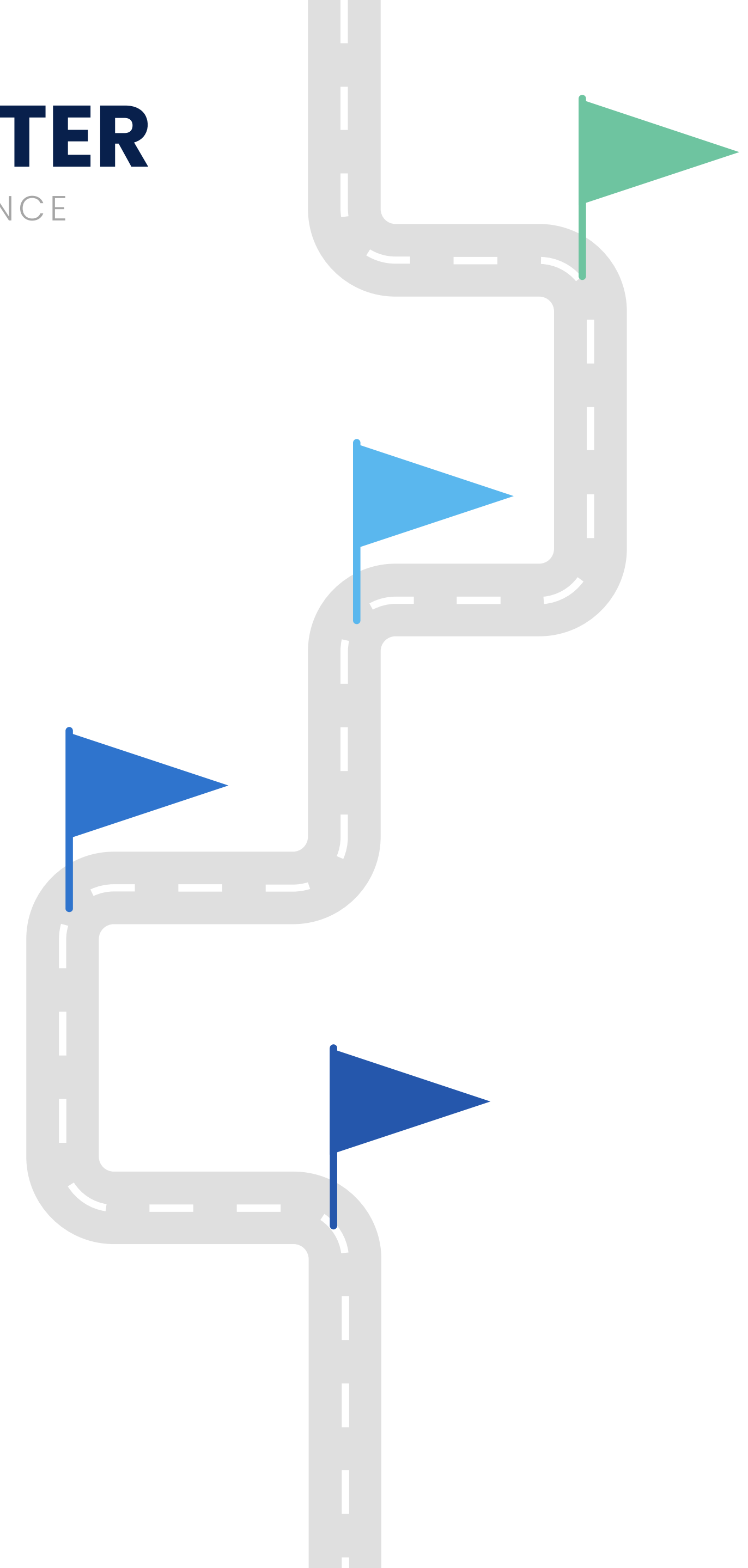
This is the easiest way to delight you client during this phase of their journey. Number 1 complaint at state bars is still attorney-client communication

- **MARKET**

It's ok to market to current clients. Your newsletter or other emails are a valuable tool at this stage

- **TECH**

Let your clients into your tech stack as much as you can, i.e. client portal



PHASE 3 – FORMER CLIENT

THE MOST NEGLECTED AND THE BIGGEST OPPORTUNITY

75%

OF LAW FIRM BUSINESS COMES FROM REFERRALS

PHASE 3 – FORMER CLIENT

WHAT ARE YOU DOING TO DELIGHT THEM INTO REFERRING BUSINESS?



SINGLE BIGGEST MISSED OPPORTUNITY

For too many law firms the relationship ends with the matter



ENGAGEMENT

Email drip campaigns and other engagement cadences is critical to the success of your firm



MILESTONES

Delight your customers with birthday emails, newsletters, etc



IT'S A RELATIONSHIP, NOT A CLIENT

Just remember that all clients are people and someone who you can have a relationship with. Treat them that way and they will pay dividends

MEASURE EVERYTHING

CRITICAL KPIs

KEY PERFORMANCE INDICATORS EVERY FIRM SHOULD HAVE AT THE READY



CONVERSION RATES

Percentage of leads that go on to become clients



CPL/CPC

How much does it cost you to obtain a lead and how much to obtain a client



Revenue by Source + Conversion Rate by Source

It's critical to know what marketing sources are working so you can spend more money on what works and less on what doesn't

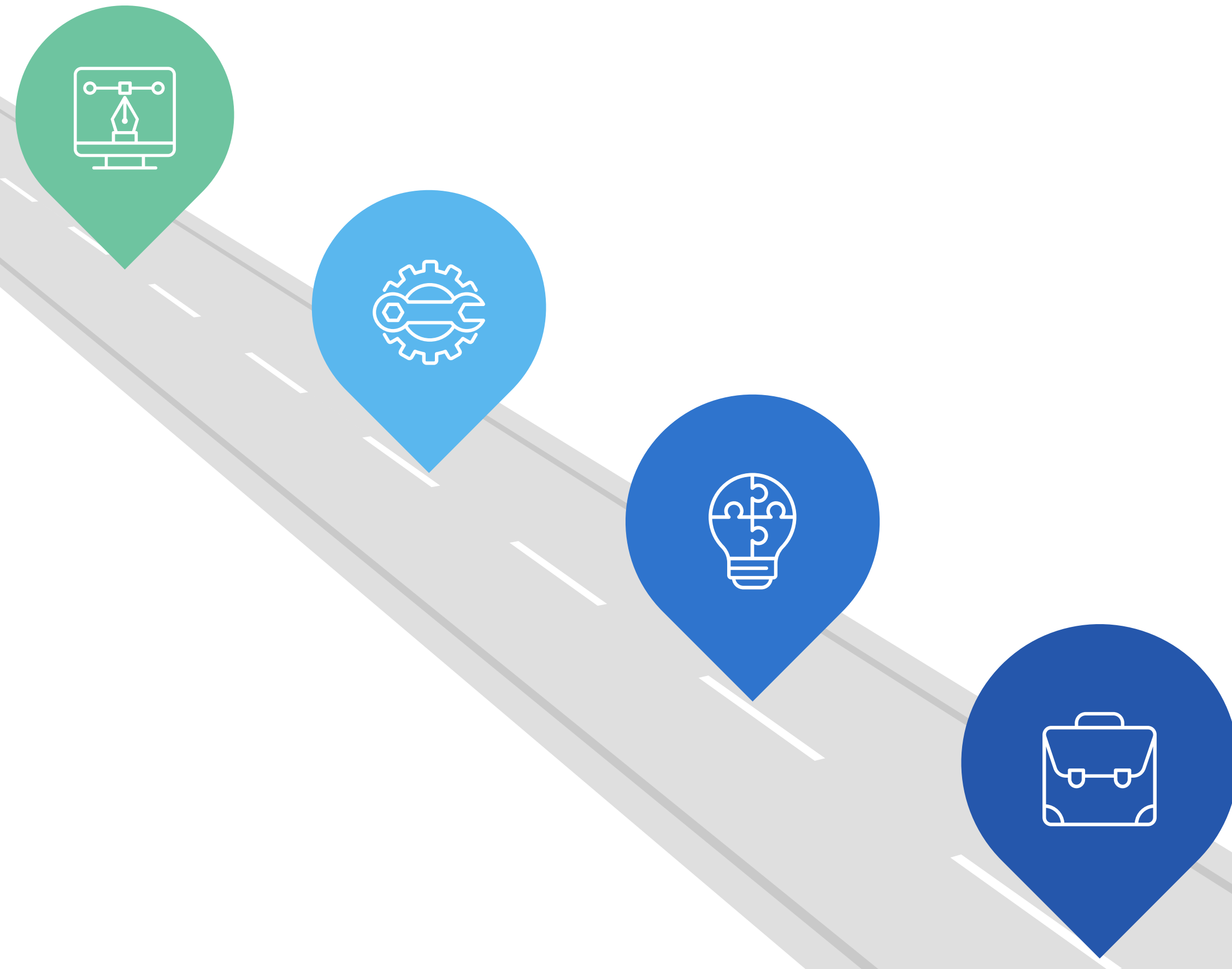


CONSULTATION SHOW RATE

If they don't show up they can't hire you

AUTOMATION STRATEGY

HOW TO APPROACH BUILDING AUTOMATIONS



● **KNOW YOUR PROCESS**

Understand what you have processes for and create processes where necessary

● **WRITE THEM OUT**

Literally write down on paper all the different processes that you have or that you would like to have

● **DETERMINE TRIGGERS**

Each process will need a trigger, something that indicates that the process/workflow is to begin

● **LIST EACH ACTION**

Once you have your triggers, list out each action, step by step, needed to complete the process/workflow

TECH STACK FOR THE JOURNEY

What tech do you need to cover the full lifecycle



01

INTAKE

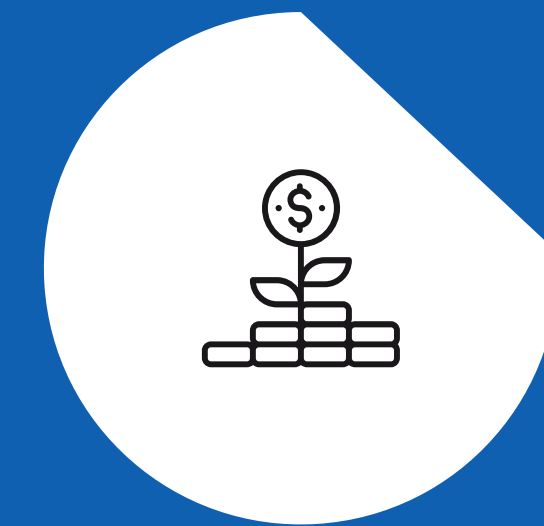
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