From Surviving to Thriving
Growth Levers for Law Firms

GNGF

Get Noticed Get Found

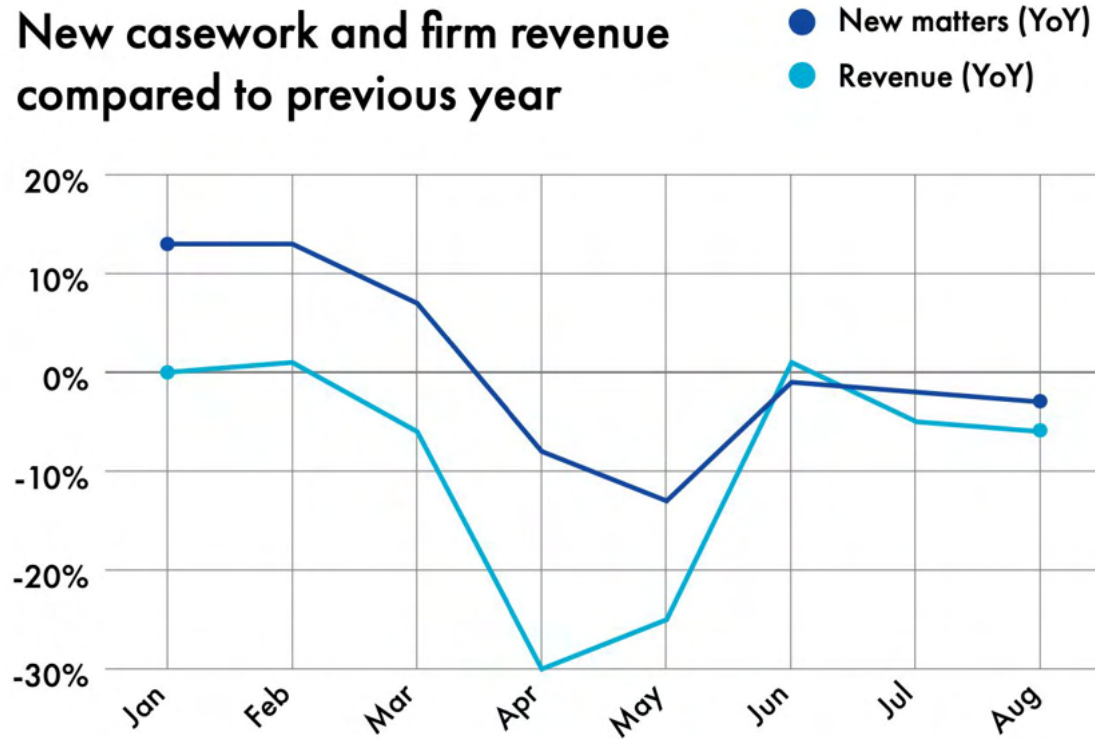# Key 2021 Marketing Trends and the Tactics to Help You Thrive

WHY MARKETING?

New casework and firm revenue compared to previous year

Legend: New matters (YoY), Revenue (YoY)

CLIO.COM/LTR

Law Firm Leads: 2019 vs. 2020
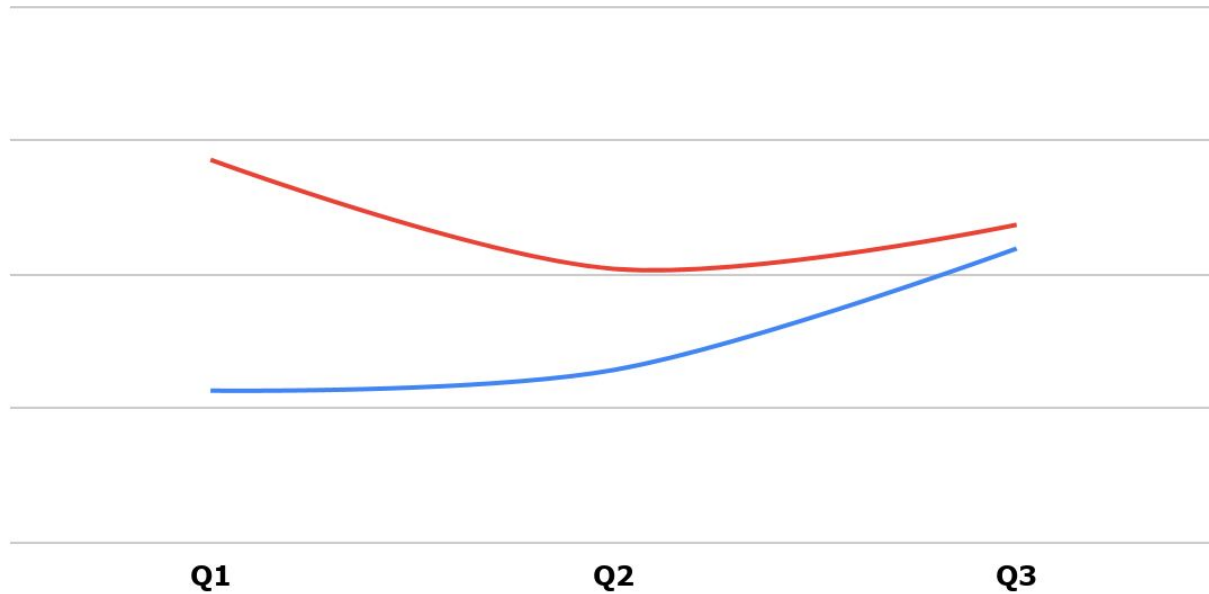
AVERAGE LAW FIRM*

Q1 2020: Revenues **UP 10%** vs 2019

Q2 2020: Revenues **DROP 8%** vs. 2019 (New Matters Drop 30%)

*from Clio Legal Trends Report 2020

LAW FIRMS INVESTING IN MARKETING*

Q1 2020: Leads **UP 55%** vs. 2019

Q2 2020: Leads **DROP 20%** vs. Q1

Q2 2020: Leads **UP 23%** vs 2019

*GNGF Data: Law Firms minimum spend of $12,000/year on Marketing

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Marketing Trend #1:

The way people find your Law Firm has become more fragmented

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Get Noticed Get Found
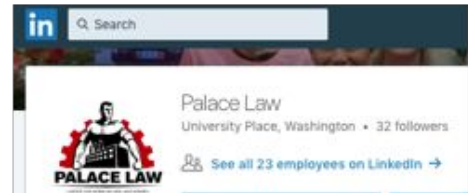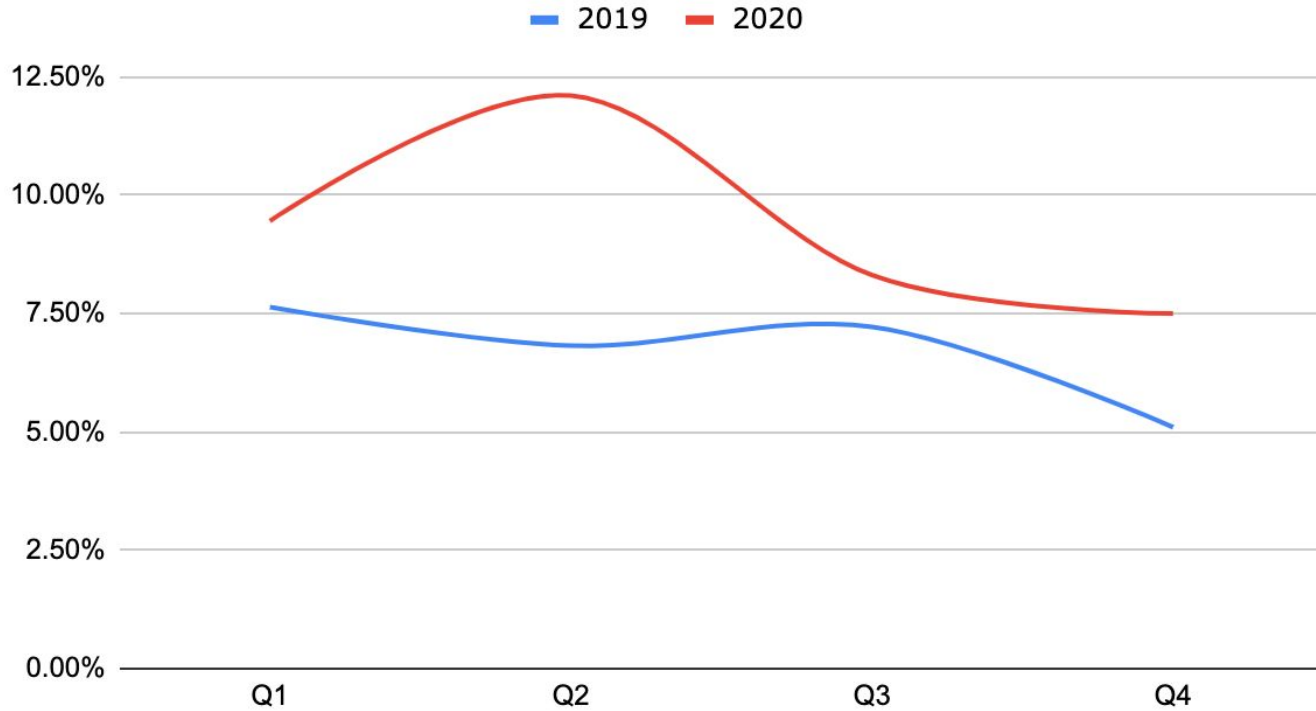
% of Websites Visits from Social Media

Your Marketing Strategy should be Multi-Channel

Build a Content strategy that incorporates at least 3 channels

Tactics:

- Website Content
- Email Newsletters
- Social Media Posting
- Video and Commercials on YouTube
- Google Paid Ads and Social Media Ads
- Google My Business
- Webinars
- TikTok?

Marketing Trend #2:

Consumers Expect Digital Service Options

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"Reimagining marketing in the next normal"

- Teladoc Health...reached 1.7 million people in the US in Q1 2020, twice as high as in Q3 2019...

- ...we have vaulted five years forward in consumer and business digital adoption in a matter of around eight weeks.

- Fully 75 percent of people using digital channels for the first time indicate that they will continue to use them when things return to "normal."

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CMO Survey

- The "return to normalcy" is not expected to occur for up to 1-2 years.
- **"increased value placed on digital experiences"** is expected to "never return" to pre-pandemic days... **this is viewed as a permanent change**.
- 25.3% of B2C Services generated from internet based sales respectively.
- Small companies are also selling/servicing more online, with companies under 500 employees selling 26.1% over the Internet (more than larger companies)

Highlight Your Customer Experience Improvements

Did you accelerate your operations to meet consumer needs?
Include this in your brand message

- Ease of Online Consultations / Meetings
- Payment Plans, Credit Cards
- Productized Services, Flat Fee, Subscriptions
- Faster Turnaround
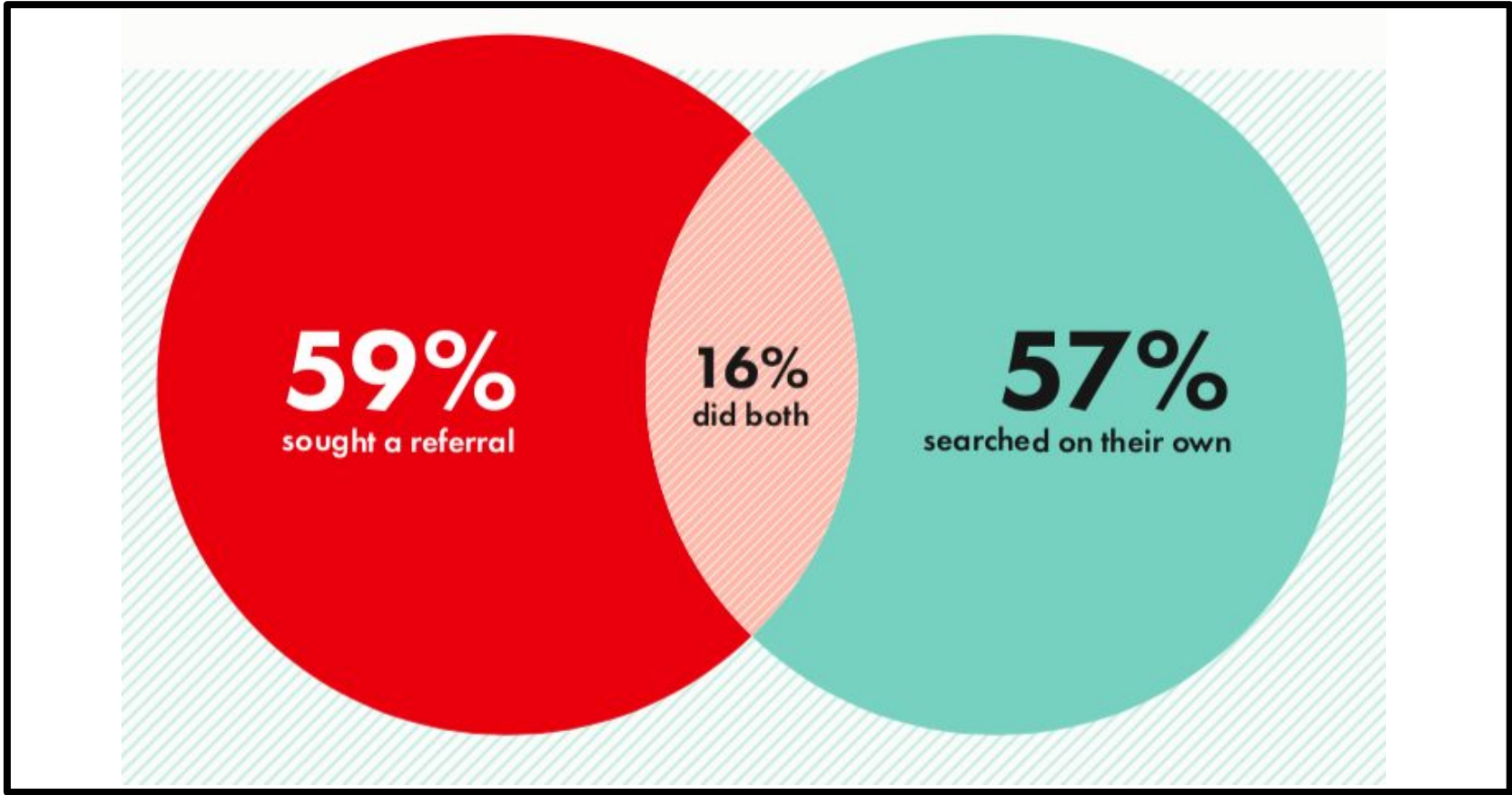- Client portals, shared documents

Client Journey

Practice Management vs. Customer Relationship Management

AWARENESS

ADVOCACY

INTEREST

RETENTION

PURCHASE

SERVICE / FULFILLMENT
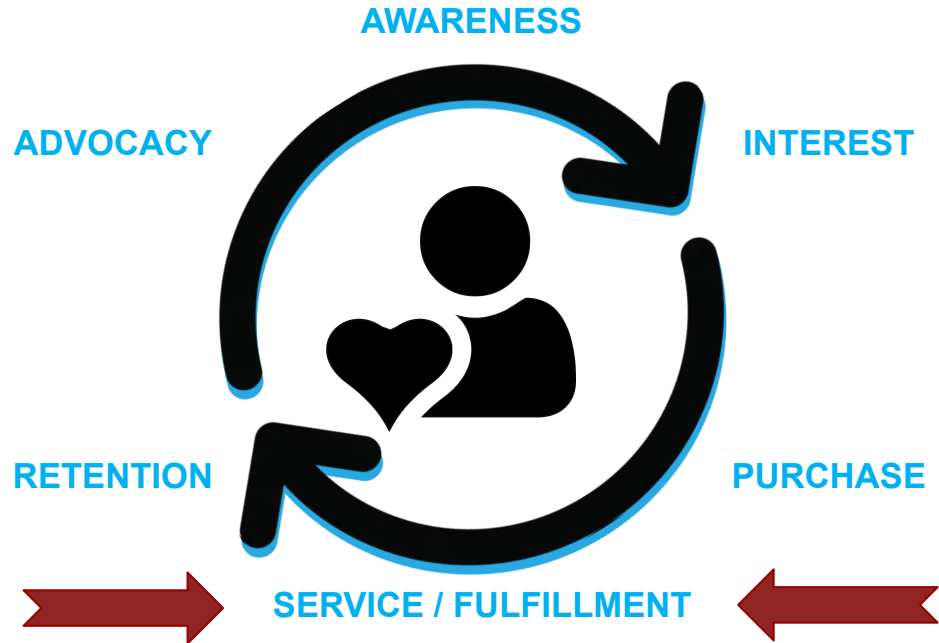
Marketing Trend #3:

Google is Now a Referral Partner

GNGF
Get Noticed Get Found

Use Digital Tools to Enhance Referrals

- Digital assets for referral partners: checklists, e-books, webinars

- Create email newsletters targeted to your referral partners

- Optimize your Google My Business Profile

- Get Reviews - twice the competition

- Google is a referral partner: Search Engine Optimization a must
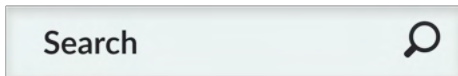
Complimentary Book

PDF eBook version of our best-selling book sent to your email
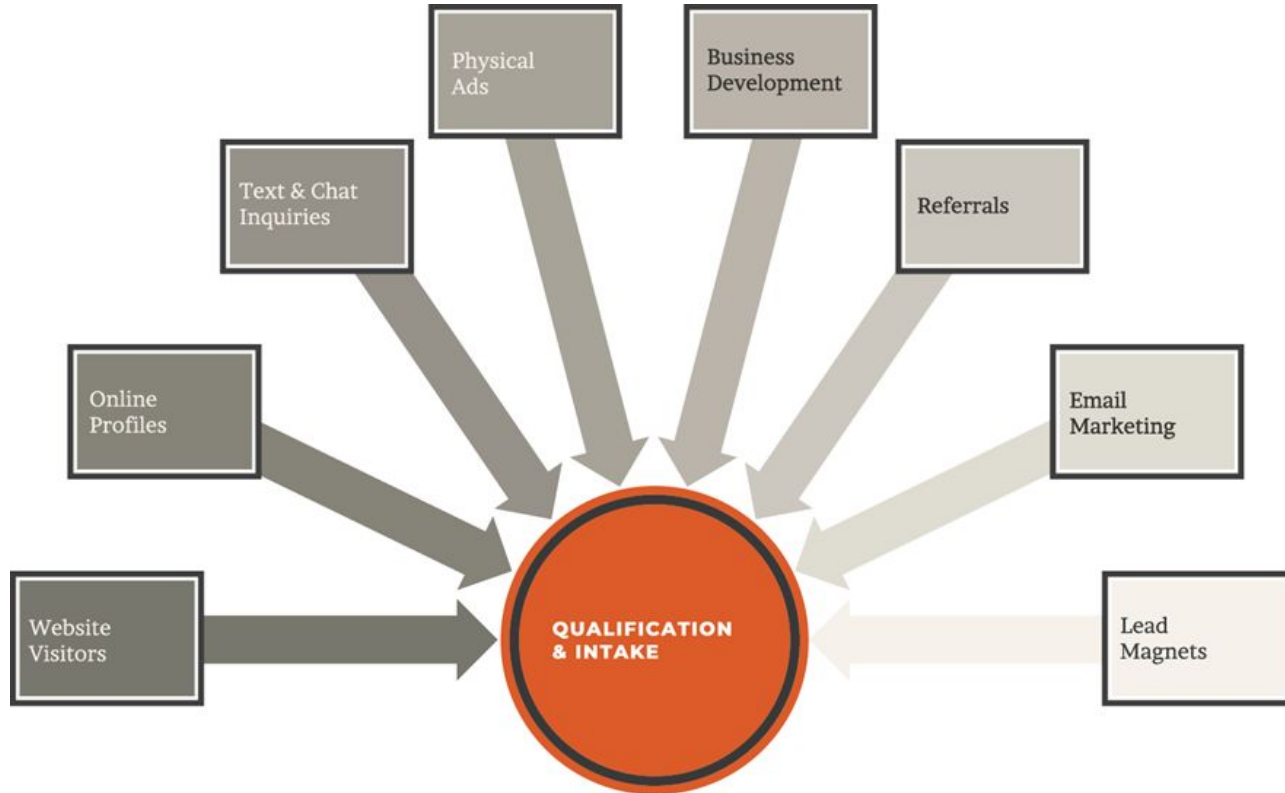
GNGF.COM/THRIVE
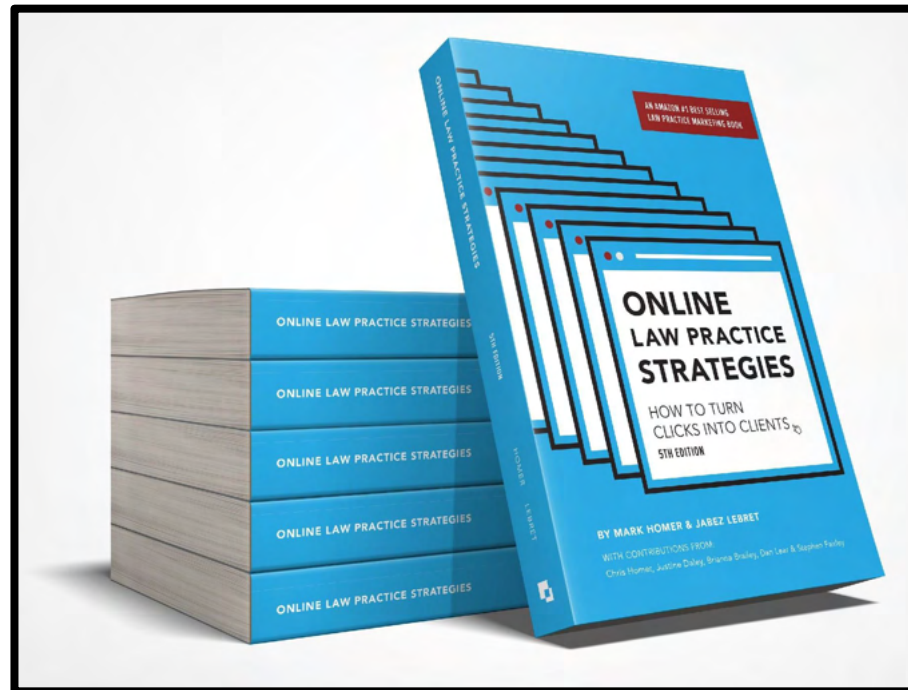
Reaping the Rewards of Responsiveness in a 24/7 World

Let's Talk "Omnichannel" Communications

Responsiveness is a function not only of speed, but also of channel. Switching channels creates friction, and friction causes lost leads. Respond in-channel, instantly, to optimize conversions and client experience. Call answering is critical, but increased screen time now demands businesses to respond via text-based communications like chats, texts, and social messages.

Answering: From Every Angle

Physical Ads

Business Development

Text & Chat Inquiries

Referrals

Online Profiles

Email Marketing

Website Visitors

QUALIFICATION & INTAKE

Lead Magnets

smith

Meeting Consumer Expectations

Consumers are impatient

Speed is everything to today's buyers, and patience wears out at 10 minutes.

82%
of consumers rate an "immediate" response as important or very important when they have a marketing or sales question.

90%
of consumers rate an "immediate" response as important or very important when they have a customer service question.

Percentage of consumers who define "immediate" as 10 minutes or less, by their stage in the customer journey.
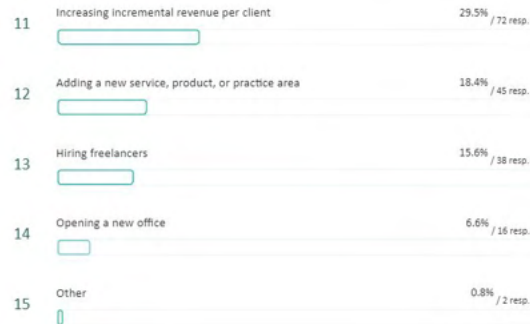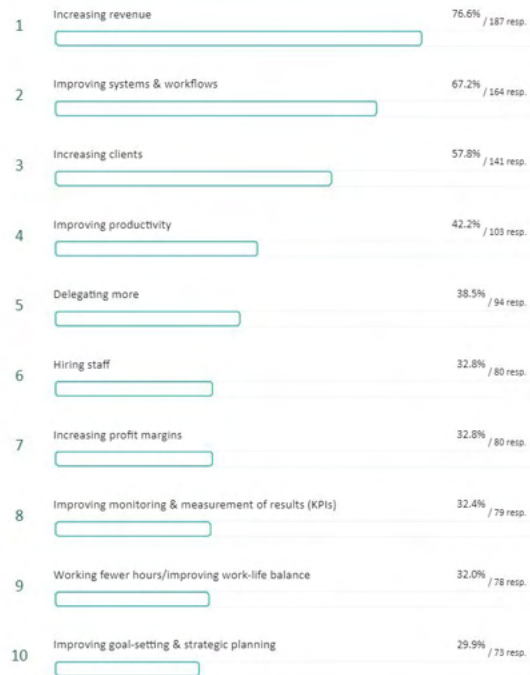
46%

62%

60%
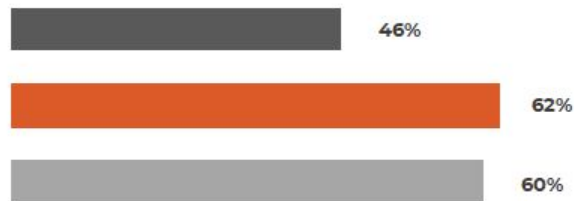
Base: 1,000 consumers in the US, UK, Australia and Singapore
Source: HubSpot Research Consumer Customer Support Survey, Q2 2018

HUBSPOT RESEARCH
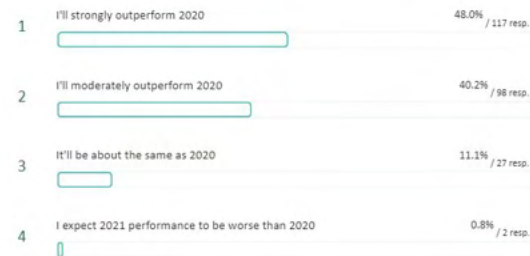
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State of Small Service Businesses - 2021

Looking forward to 2021, what areas of your business are you most focused on improving?

244 out of 244 answered

#	Area		
1	Increasing revenue	76.6%	/ 187 resp.
2	Improving systems & workflows	67.2%	/ 164 resp.
3	Increasing clients	57.8%	/ 141 resp.
4	Improving productivity	42.2%	/ 103 resp.
5	Delegating more	38.5%	/ 94 resp.
6	Hiring staff	32.8%	/ 80 resp.
7	Increasing profit margins	32.8%	/ 80 resp.
8	Improving monitoring & measurement of results (KPIs)	32.4%	/ 79 resp.
9	Working fewer hours/improving work-life balance	32.0%	/ 78 resp.
10	Improving goal-setting & strategic planning	29.9%	/ 73 resp.
11	Increasing incremental revenue per client	29.5%	/ 72 resp.
12	Adding a new service, product, or practice area	18.4%	/ 45 resp.
13	Hiring freelancers	15.6%	/ 38 resp.
14	Opening a new office	6.6%	/ 16 resp.
15	Other	0.8%	/ 2 resp.

Overall, how are you feeling your business will perform in 2021 compared to 2020?

244 out of 244 answered

#	Response		
1	I'll strongly outperform 2020	48.0%	/ 117 resp.
2	I'll moderately outperform 2020	40.2%	/ 98 resp.
3	It'll be about the same as 2020	11.1%	/ 27 resp.
4	I expect 2021 performance to be worse than 2020	0.8%	/ 2 resp.

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Consumer Buying Statistics Affecting Law Firms

82% of consumers expect an immediate response when inquiring about services

67% of law firm clients say their "decision to hire" is most influenced by an attorney's initial responsiveness to their first contact

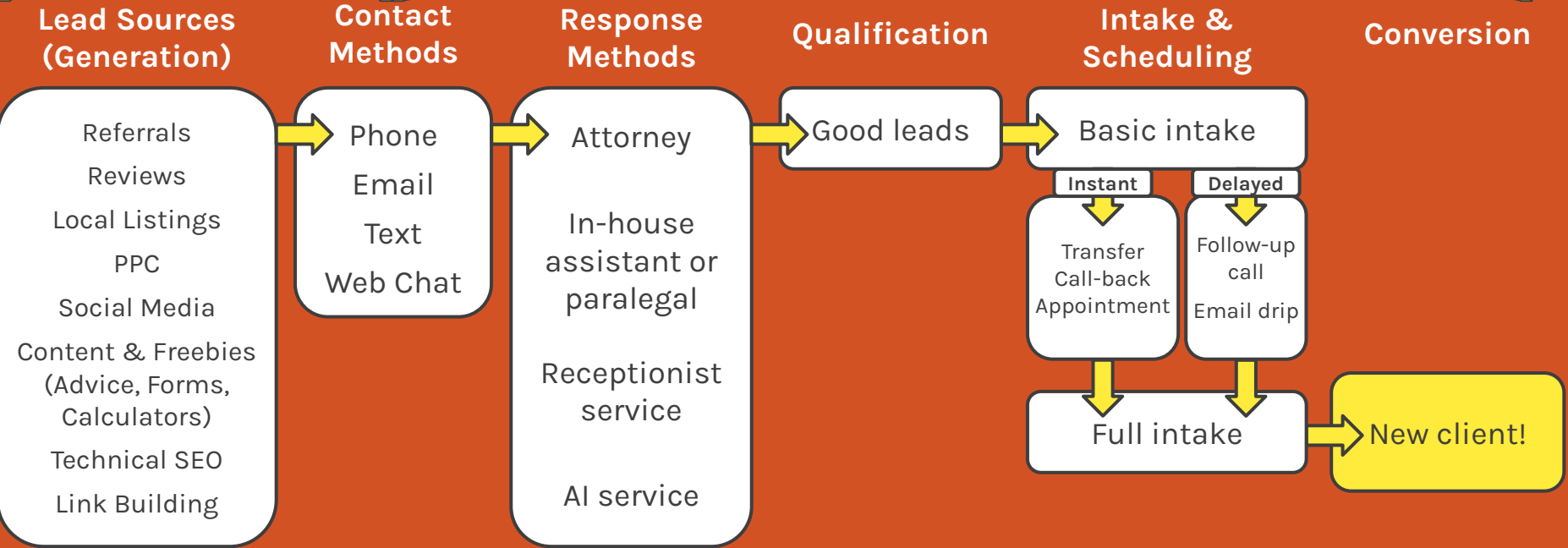**64%** of legal consumers look for an attorney who offers a free initial consult

59% of PNCs did not hire an attorney after the consult
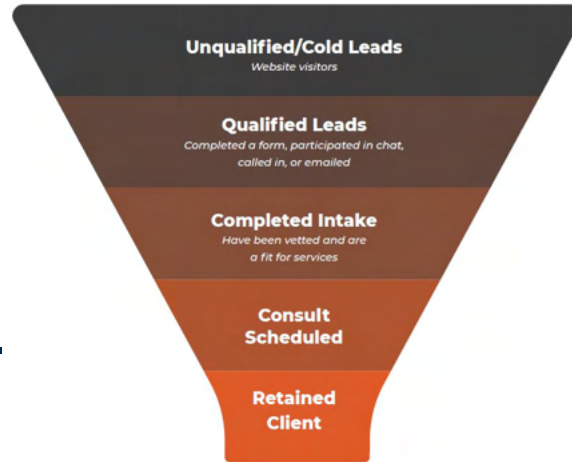
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LEAD CONVERSION FLOW

GENERATE

CAPTURE

Lead Sources (Generation)	Contact Methods	Response Methods	Qualification	Intake & Scheduling	Conversion

Lead Sources (Generation)

Referrals
Reviews
Local Listings
PPC
Social Media
Content & Freebies (Advice, Forms, Calculators)
Technical SEO
Link Building

Contact Methods

Phone
Email
Text
Web Chat

Response Methods

Attorney

In-house assistant or paralegal

Receptionist service

AI service

Qualification

Good leads

Intake & Scheduling

Basic intake

Instant
Transfer
Call-back
Appointment

Delayed
Follow-up call
Email drip

Full intake

Conversion

New client!

Qualification

Bad leads

Good Will & Future Clients

Referrals

Leads come in, but who's responding to them?

Know your gains
and losses at
every stage
to begin optimizing.

| Unqualified/Cold Leads |
| Website visitors |

| Qualified Leads |
| Completed a form, participated in chat, called in, or emailed |

| Completed Intake |
| Have been vetted and are a fit for services |

| Consult Scheduled |

| Retained Client |

CONVERSION METRICS	COST AND REVENUE	MARKETING COA & ROI
1,000 Visitors	$5,000	$5.00 Visitor
80 Leads		$62.50 Lead
40 Qualified Opportunities		$125.00 Opportunity
20 Consultations		$250.00 Consultation
10 Retained Clients	$20,000	$500.00 Client

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Inconsistencies are solved by better systems & service that leverage outsourcing and automation

OUTSOURCING FITS MID-FUNNEL...

New Leads
Website visitors, referrals, readers, followers

Contacted Leads
Completed a form, used web tool, participated in chat, called in, texted, emailed

Qualified Leads
Have been vetted, and are a fit for services

Consult Scheduled

Assessed & Retained
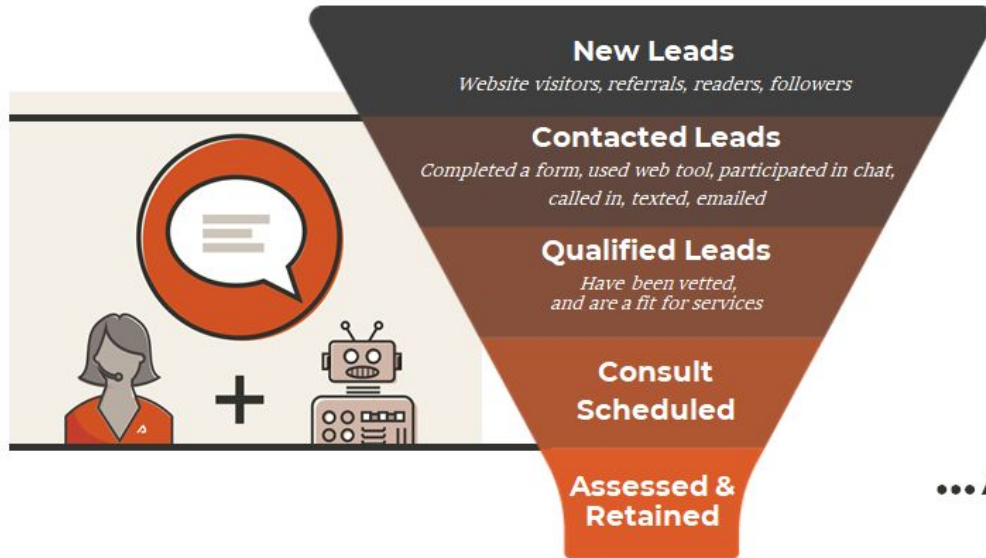
...AND DURING SERVICE DELIVERY

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Phone Systems & Services: Low-Hanging Fruit

- **Mobility & Accessibility**
  In-the-loop w/o interruptions
- **Menus & routing**
  - Leads vs. clients vs. court staff
  - Prioritization & delegation
- **Don't neglect "outbound" responsiveness**
- **Blasts & sequences**
- **Overflow call handling**
- **After-hours handling**
- **Blocking spam & sales calls**

Services:
- **IVR vs. answering vs. receptionists**
- **Messages vs. workflows**
- **Cost:** considering net value, not just upfront expenditure

93% OF CONVERTED LEADS ARE CONTACTED BY THE 6TH CALL ATTEMPT

NUMBER OF CALL ATTEMPTS

39% OF NEW LEAD CALLS REACH VOICEMAIL
…CUTTING OFF 48% OF LEADS WHO CONVERT AT 1ST ATTEMPT
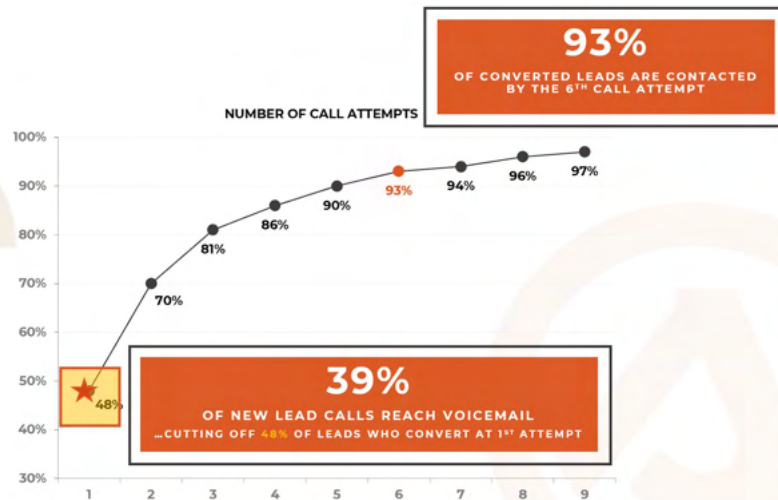
Phone Precautions

Potential Issues & Common Complaints
- **Phone systems**
  - Ring delays (latency, mainly)
  - No real-time support (Google Voice forums)
  - No tracking or analytics
    (How will you track marketing ROI?
    Answers: CallRail, Google Tags, ASK!)
- **Answering Services & Receptionists**
  - Limited impact (answer/transfer/message vs. workflows & integrations — consider impact on time-to-conversion & opportunity cost of key staff's time)
  - Adherence to directions
  - Language gaps (no Spanish speakers)
  - Single-channel vs. multi-channel coverage for chat, text, Facebook
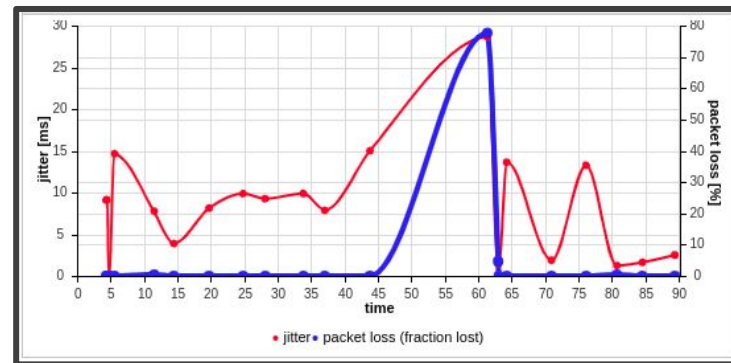
MORE: Read Smith.ai guest blog post "How to Get Crystal-Clear VoIP" by Graham Nelson-Zutter, Cofounder & CTO of Corvum.io, a Clio-integrated VoIP provider dedicated to legal professionals.

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After the "Answer:" Basic Intake (Capture-to-Help Model)

Standard intake form : Cooper Law, LLC online intake form

Lead selects:

- Practice area

- Whether a court hearing is scheduled

*These are required fields.

After form completion, potential client is given option to book free 15-minute consultation.

After the "Answer:" Help-First Model (*then* Capture)

Alternative forms that double as basic intake forms:

▸ [Traffic ticket estimate request form](#) vs. [standard traffic ticket intake](#)
▸ [Eviction notice](#) (see below)

Landlord receives completed eviction notice via email with submission instructions

Law firm is notified of new lead

Reminder is scheduled for follow-up based on "notice type" timing, e.g., 5 days

---

Tip: Require agreement to website terms & conditions upon form completion, so emails (e.g., lead nurturing campaigns) can be sent as follow-up communications to increase lead-to-client conversion. Agreement to terms = permission to email.

Smart Calendaring Solutions: Book Leads & Much More

▸ **Integration for web, email, workflows**

▸ **Reduce scheduling back-and-forth**
  ▷ 2 people: Clio, Calendly
  ▷ 3+ people: Doodle
▸ **Outsourcing & automation**
▸ **Precaution:** Don't block time using deadlines

Wisestamp

Doodle

Calendly

The Move to Chat. Exposing What You've Been Missing
Chat lets you get in front of the call (or even eliminate it)

MORE CLIENTS, MORE PRIVACY FEWER INTERRUPTIONS
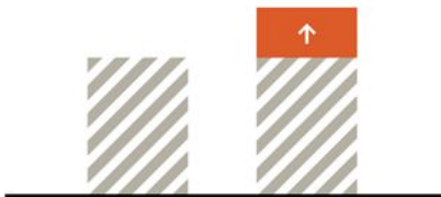
Professional services firms that use website chat see a **20-30%** increase in lead conversion. Expect **1 net-new chat lead for every 4 calls**

LEAD QUALIFICATION

Sarah
McKennon Law

Hi, I need a divorce attorney and found McKennon Law online. Are you taking new clients?

Hi, Jordan. We are taking clients for divorce cases. Are you available next week for a free 30-minute phone consultation?

Yes! Wednesday or Thursday works.

Okay — I have 11AM or 3PM on Wednesday.

11AM is perfect.

Great! I will send you a calendar invite with more details to jdw1982@gmail.com. What is the best number to reach you directly?

Type a message

REAL-TIME ENGLISH-SPANISH TRANSLATION

Alex
Hacking Law Practice, LLC

si esta bien! Me puede decir si tiene costo la consulta?

7 minutes ago

Hay una tarifa de $ 100.00 por la consulta. ¿Podrías dar tu apellido?

Alex • 6 minutes ago • Show original (English)

Si claro que si. Mi apellido es Valverde

6 minutes ago

para cuando tiene citas

6 minutes ago

Powered by *smith*

The Difference Between Live Chat and Chat Bots
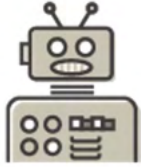
A **Chat Bot** is an automated service that lives on your website. Powered by artificial intelligence, it can offer simple answers to common questions that have been programmed into the system, such as the location of the office, practice areas of the firm, process for setting up a consultation, and more.
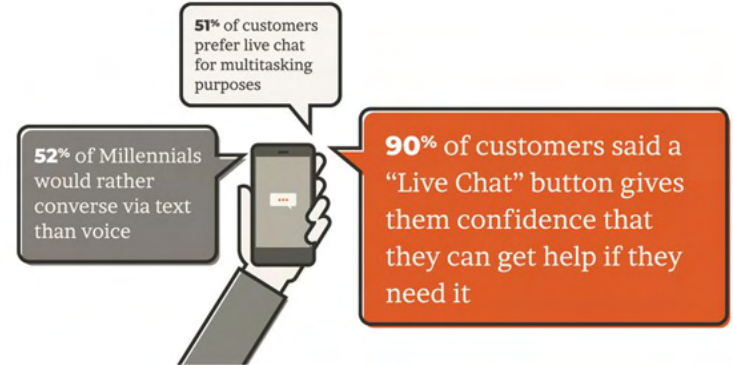
Chat bots get smarter over time thanks to interactive training with the firm's attorneys and staff.

Live Chat is when messages initiated by a website visitor are addressed by a live person who has the ability to answer questions, carry out complete workflows (such as lead qualification and consult scheduling), and help existing clients obtain information or connect with staff or an attorney. Live Chat can be staffed by in-house teams or remotely by third-party vendors.

Hybrid Chat combines Live Chat and Chat Bots for the accuracy of an automated system with the sensitivity of a real person.

51% of customers prefer live chat for multitasking purposes

52% of Millennials would rather converse via text than voice

90% of customers said a "Live Chat" button gives them confidence that they can get help if they need it

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Chat Best Practices

- **Proactive**: Staff with live agents, and choose proactive, yet patient, engagement

- **Page-specific help**: Reduce cost, focus on top-converting pages

- **Gatekeeping**: Serve as "gatekeeper" to online calendar for consultations to reduce no-shows and cancellations

- **Sentiment sells.** Focus on sentiment first, goal second.

- **Lead qualification & referrals**: Identify leads with your custom criteria
  - Schedule consults & initiate call-backs with qualified leads
  - Refer out "bad" leads

- **Chat-to-call**: Instant transcripts and chat-to-call flow allow immediate, informed intake by remote or in-house staff

Recommended: Add disclaimer before a chat starts

Welcome to D'Orazio Peterson LLP

Any information disclosed during this conversation does not constitute legal advice and does not establish an attorney-client relationship.

Enter your info to start a conversation

Name

Email

Start

Powered by **SMITH**

Sounds great? Wait! None of this works without identifying what makes a good lead. Document THEN delegate.

CREATE YOUR IDEAL INTAKE FORM

GOAL
Standardize data collection to consistently capture, qualify, and route PNCs.

INSTRUCTIONS
Within each section, add the information you need to collect to effectively and efficiently screen PNCs.

FORM SECTION	FIELDS
Contact Details	
Case Details	
Financial Details	
Payment Preference	
Expected Time to Close (Urgency)	
Case Value	
Source	
Other	

EXAMPLE
Intake Form

FORM SECTION	FIELDS
Contact details	Name, address, phone, email
Case details	Date of accident, court date, marital status, names of other parties involved
Financial details	Annual income, employment status
Payment preference	Credit card, cash, check, ACH, payment plan
Expected time to close (urgency)	Considering options, urgent, 2–3 months, 6 months, within 1 year
Case value	$_____
Source	Google search, Facebook, individual, organization
Other	Police report, damage photos, doctor, insurance

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Now, it's game time

- **Identify 5-10 preliminary lead-qualification questions**
  - ▷ Focus on "must have" qualities to filter leads: good vs. bad
- **Build a basic, shareable intake form** (publicly accessible link)
- **Define qualification & intake processes, and consider how to handle each step:**
  - ▷ Self (continue doing)
  - ▷ Streamline (cut/reduce/ease)
  - ▷ Automate (w/ software or app)
  - ▷ Outsource (w/ service)

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Get in position to win

- **Prioritize fixes by greatest time consumption, importance (lawyering) & urgency**
  - Consider [Eisenhower Decision Matrix](#)
  - Tips:
    - **Qualification & payments** are often most time consuming & most easily outsourced
    - **Data entry & lead follow-up** are most easily automated
- **Implement new form & process in next 30-60 days**, depending on scope, cost & difficulty.
- **Wait 1-2 months to re-stabilize.** Evaluate impact: savings, earnings, leads, clients, work/life balance, stress levels, sleep quality, etc.
- **Re-evaluate process & improvement opportunities 1-4 times per year.**

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Far-reaching impacts on your firm

Win more clients

Boost marketing results

Extend hours & capacity

Reduce interruptions

Improve client happiness

Increase staff productivity

Free resources to help you identify & implement responsive practices
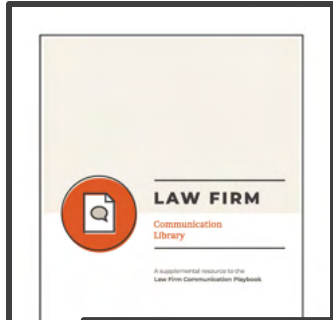
The Law Firm Communication Library

The Law Firm Communication Playbook

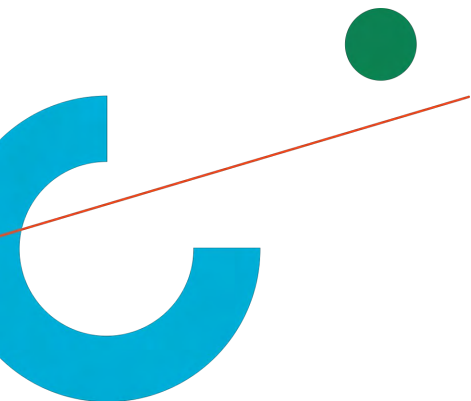**[eBook] Fortifying Your Frontlines: How to use Virtual Receptionists for Small-Business Growth**

Key to Thriving: Time Saving Legal Technology Solutions

Our Data Inputs

All results are anonymized and aggregated

Clio's app data

Aggregated and anonymized data contributed from tens of thousands of legal professionals.

Surveys of US legal professionals

Multiple surveys with over 1,000 responses containing qualitative and quantitative results from practicing legal professionals.

Surveys of US general population consumers

Multiple surveys of over 1,000 responses from members of the general population.

Survey Data

Survey of US legal professionals.

- April 3 to 9: 485 respondents

- April 20 to 24: 654 respondents

- May 4 to 14: 609 respondents

- May 18 to 29: 783 respondents

- June 15 to 22: 566 respondents

- July 13 to 22: 635 respondents

- August 6 to 22: 1,044 respondents

Survey of US general population consumers.

- April 14: 1,042 respondents

- May 4 and 5: 1,019 respondents

- May 18 and 19: 1,055 respondents

- June 16 to 18: 1,004 respondents

- July 13 to 14: 1,003 respondents

- August 4 to 7: 1,002 respondents

Impact: Casework and Revenue

New casework and firm revenue compared to previous year
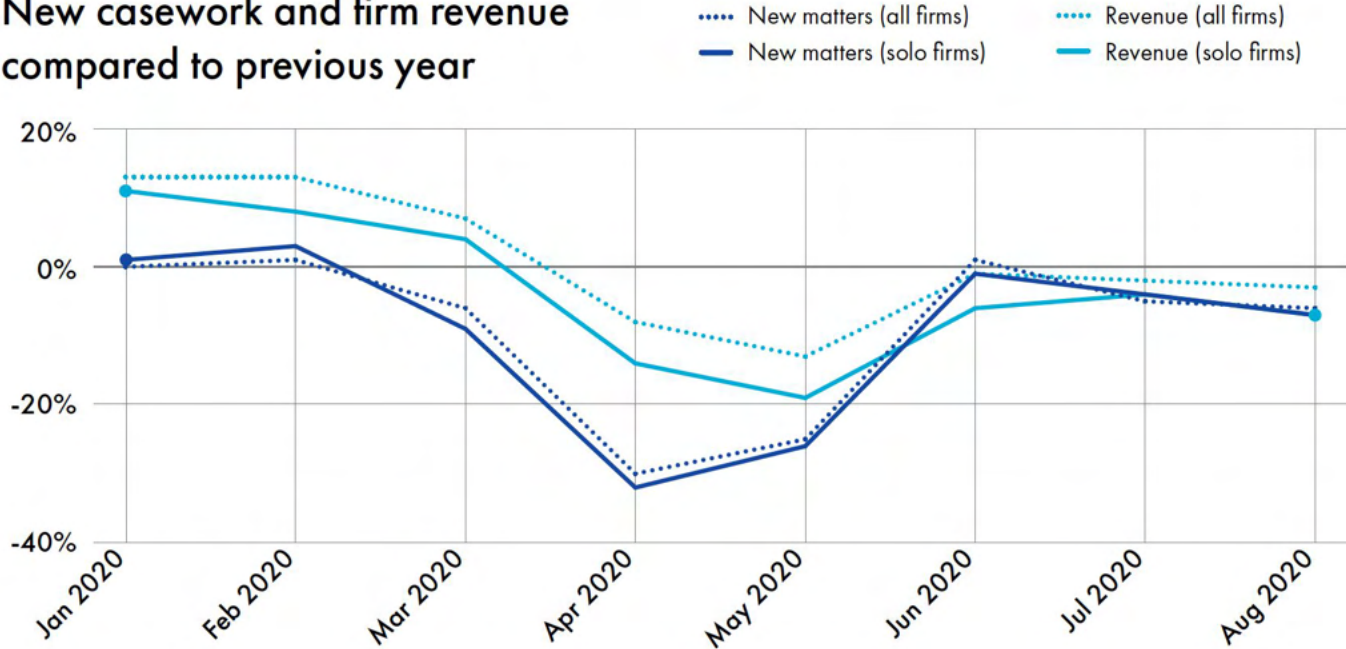
Legend:
- New matters (all firms)
- New matters (solo firms)
- Revenue (all firms)
- Revenue (solo firms)

Additional revenue collected by firms using multiple solutions* (per lawyer)

- Solo firms
- All firms

Solo firms 2019: $27,904
All firms 2019: $19,541
Solo firms 2020 (estimated): $52,507
All firms 2020 (estimated): $37,622

*Electronic payments, client portals, and client intake and CRM

LEGAL TRENDS REPORT
PUBLISHED BY CLIO

Clio

47
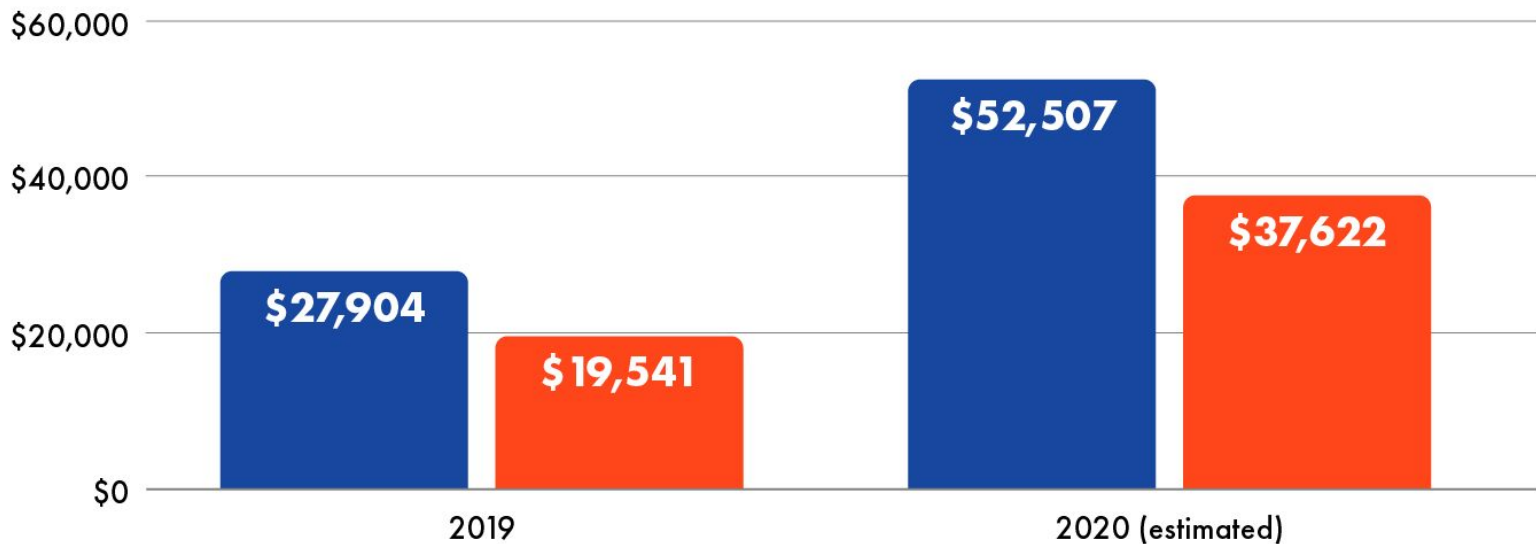
66%

are concerned about the success of their legal practice

47%

are concerned about even making a living at all

72%

are concerned that their clients won't be able to pay them

Clio

There are tangible reasons for their concern. They've seen their businesses suffer.

From our Survey Data

60% of solos reported seeing a decrease in the number of clients reaching out to their firms.

24% had to forfeit revenue by June 2020.

15% of solo lawyers had to lay off staff by July of last year.

Clio

How have client expectation changed?

58%

OF CONSUMERS SAID THAT
TECHNOLOGY IS MORE
IMPORTANT TO THEM NOW
THAN IT WAS BEFORE THE
CORONAVIRUS PANDEMIC.

52%

OF CONSUMERS SAY THEY USE MORE TYPES OF TECHNOLOGY.

50%

OF CONSUMERS SAY THEY'RE MORE COMFORTABLE WITH TECHNOLOGY.

Clio

56%

of consumers would prefer videoconferencing with a lawyer over a phone call.

65%

of consumers prefer paying for legal services electronically.

Clio

69%

of consumers prefer working with a lawyer who can share documents electronically.

Clio

Despite the benefits of adopting technology, solos are slower than other practitioners at adopting.

Technology adoption among law firms

Solo firms
Non-solo firms

Using software (rather than paper-based systems) to organize their practice
- 83%
- 89%

Meeting clients virtually
- 82%
- 88%

Saving information, documents, client files, and other firm information to the cloud (rather than a local hard drive)
- 80%
- 81%

Allowing clients to pay invoices electronically by credit or debit
- 74%
- 75%

Offering clients the option to securely share and sign documents online
- 55%
- 67%

LEGAL TRENDS REPORT
PUBLISHED BY CLIO

Clio

Technology adoption in 3 key areas drove performance.

1. Client Intake and Legal CRM

2. Online Payments

3. Client Portals

Clio

Another look

Additional revenue collected by firms
using multiple solutions* (per lawyer)

● Solo firms
● All firms

*Electronic payments, client portals, and client intake and CRM

LEGAL
TRENDS
REPORT
PUBLISHED BY CLIO
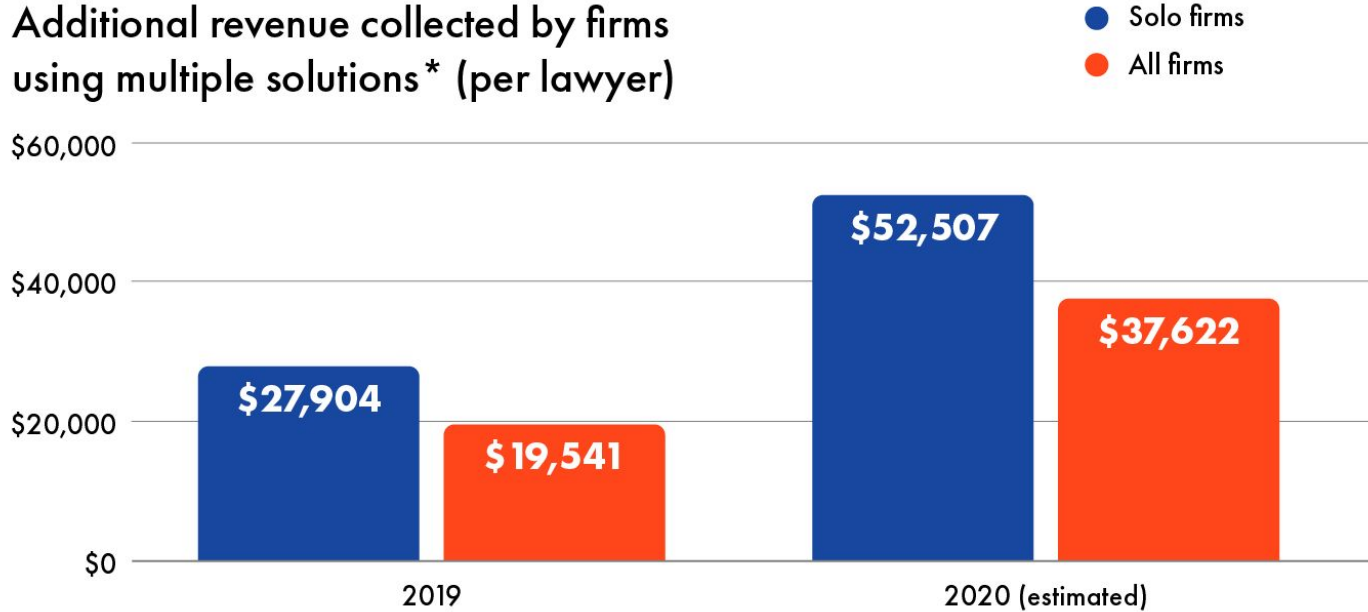
Advantages to using multiple solutions

Legend:
- % difference in total matter volume (all firms)
- % difference in total matter volume (solo firms)
- % difference in total revenue (all firms)
- % difference in total revenue (solo firms)
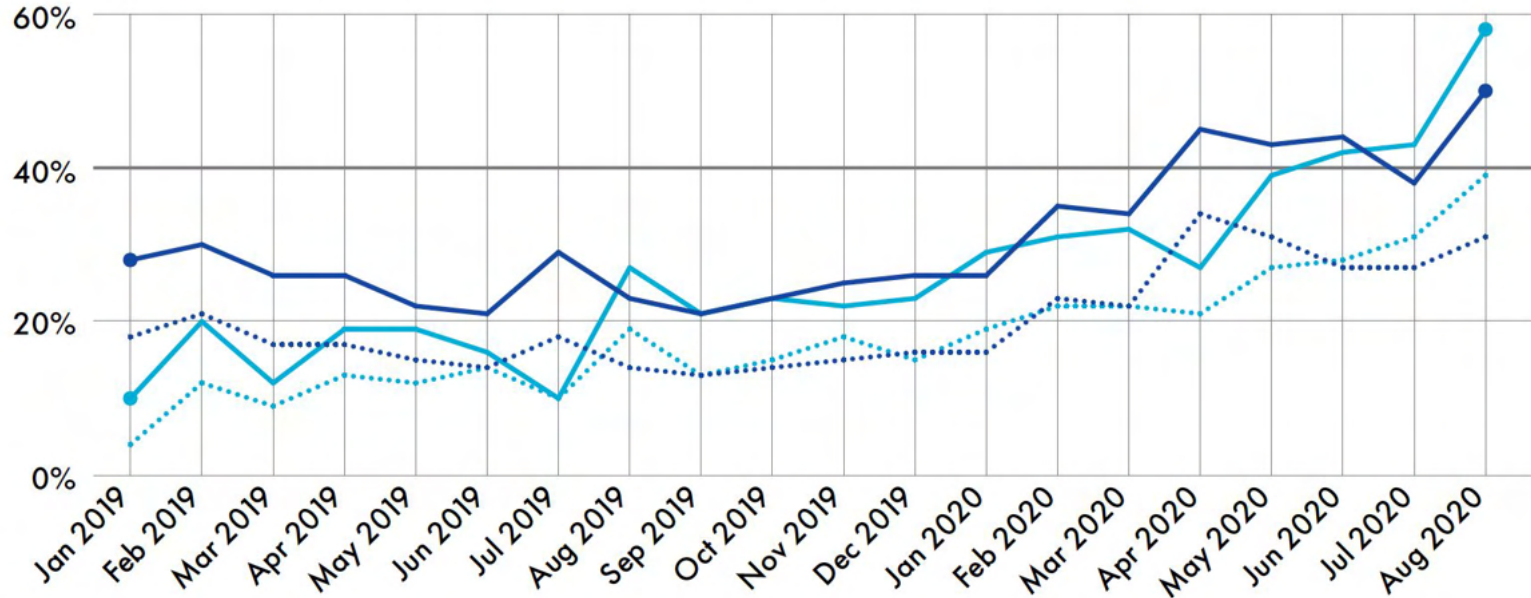
Improving Acquisition

- Improving acquisition: Scheduler + automated follow-ups
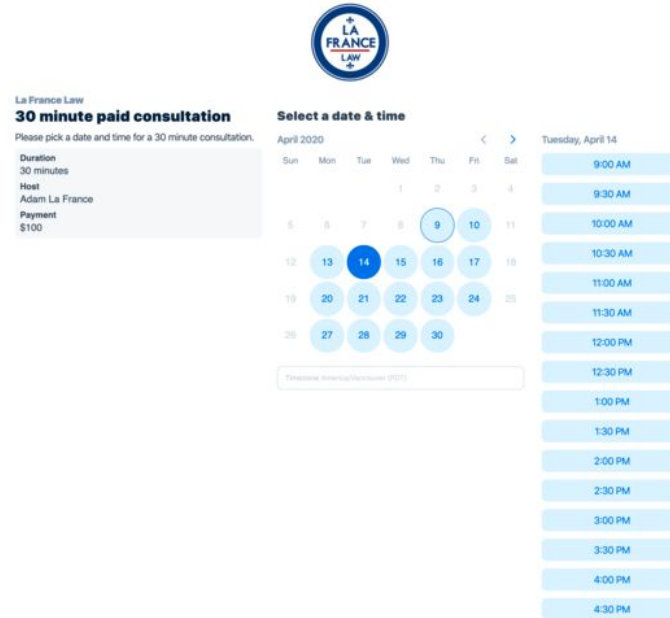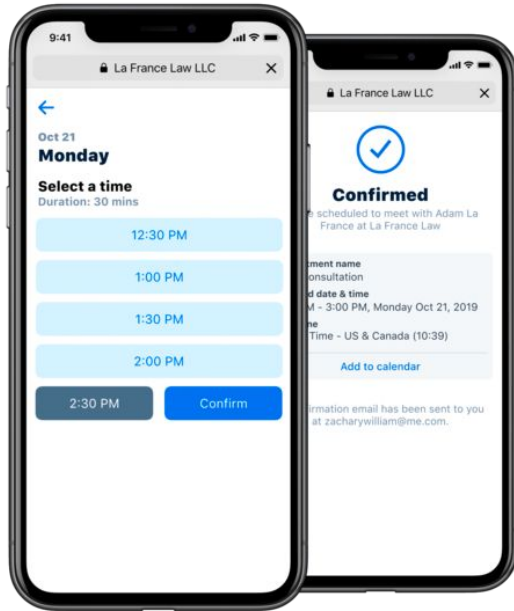
Streamlining Intake With Clio Grow

- Make the client intake process more efficient—and personal
- Automate tasks, so you can focus on what matters most
- Know which matters and clients drive your success

LawPay

AN AFFINIPAY SOLUTION
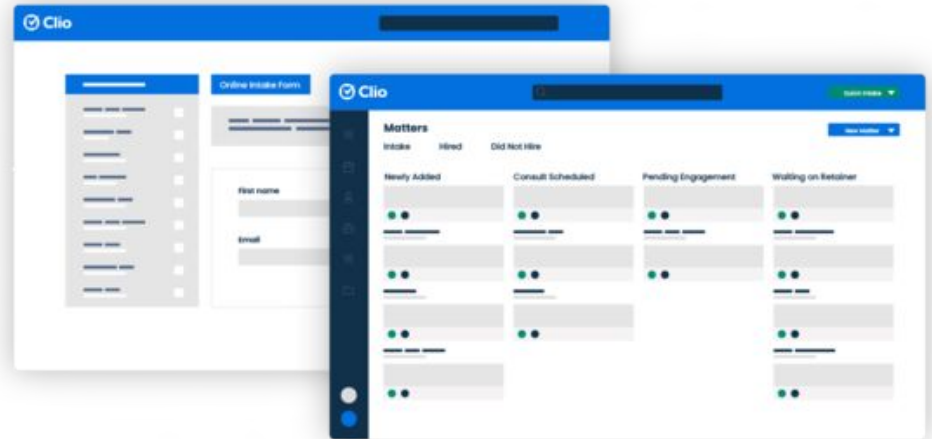
Give the People What they Want: Thriving with Online Payment Technology

If billing and collections are the lifeblood of your practice, you need to do everything you can to reduce friction and increase predictable, reliable, and on-time payments in your practice.

Today, your clients want payment options
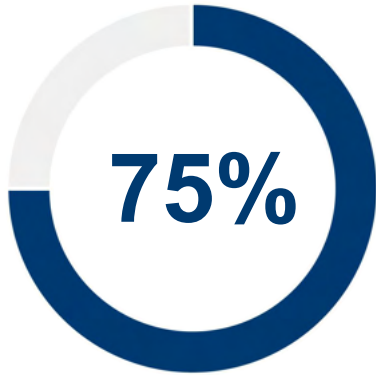
75%
people now prefer to pay with a credit or debit card
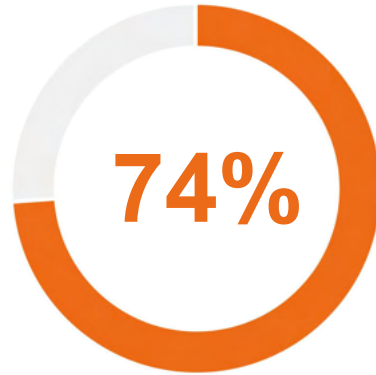
74%
online households report paying bills online
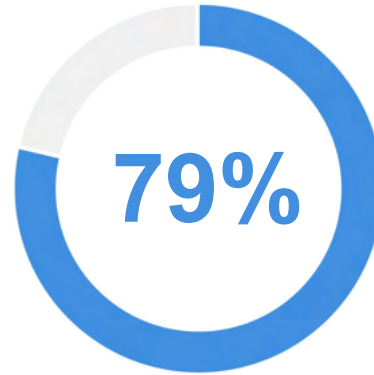
79%
consumers have switched to paperless billing
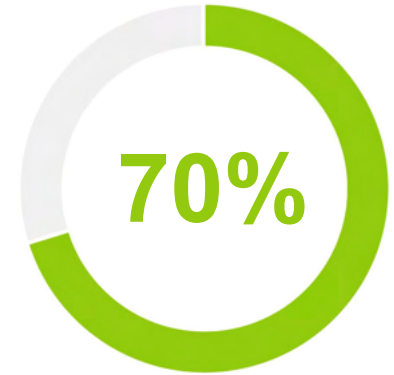
70%
say having multiple ways to pay a bill increases their satisfaction

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Electronic payments

72% of consumers would prefer to pay their legal fees via payment plan

28%

72%
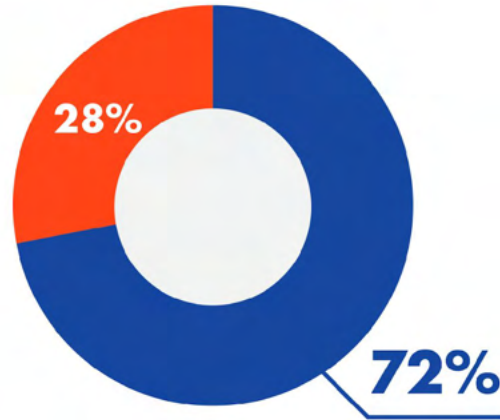
53% of law firms are equipped to offer payment plans

47%

53%

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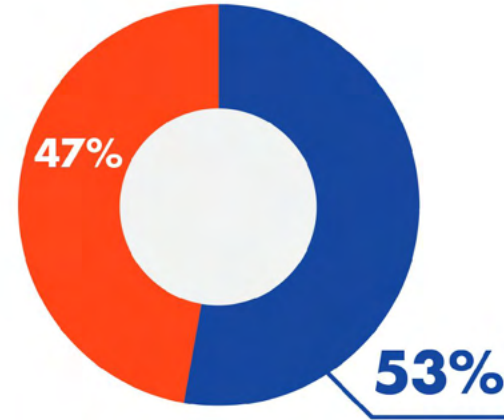
Pricing and payment options offered at law firms

● Solo firms
● Non-solo firms

Offering payment plans: 52% / 52%

Offering lower prices or discounts: 38% / 42%

Offering services at fixed fees: 70% / 62%

Allowing clients to choose what aspects of the case they want to handle themselves (rather than automatically handling the entire case for them): 30% / 29%

Offering clients subscription plans for legal services: 8% / 8%
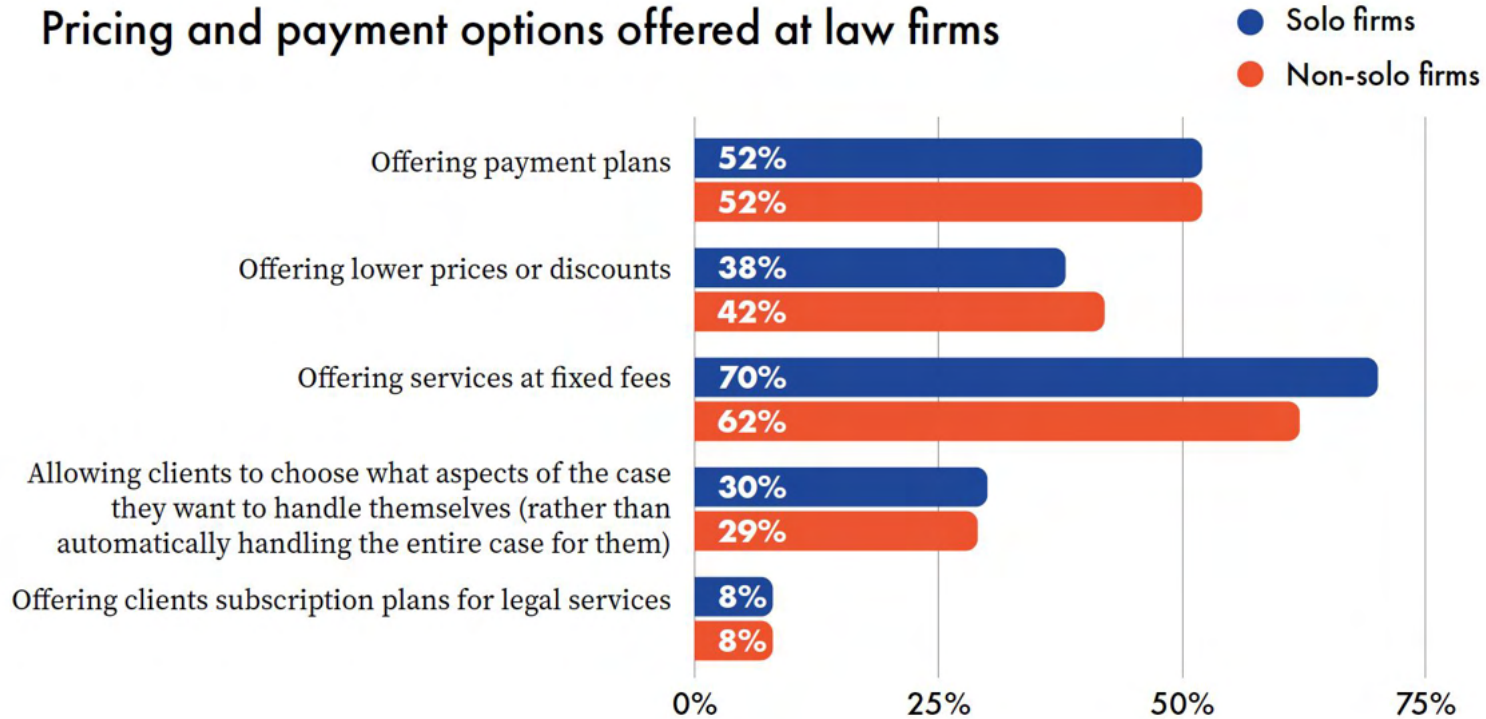
Online payments lets you...

✔ Improve communication

✔ Offer a 24-hour virtual service

✔ Put the ability to pay right in your clients' hands

✔ Provide instant payment confirmation

✔ Appeal to younger, tech-savvy clients

Improving your processes: billing and collections

Billing and collections

- Use credit cards/online payments to your advantage

- Get paid the same day (or hour) an invoice is sent out

- Send clients payment links for exact amounts

- Set clients up on a payment plan with authorization forms

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#ProTip on authorization forms

Have your fee agreement echo your credit card authorization forms

Tips for getting money in the door

- Don't be shy

- Be practical and organized

- Bill clients regularly, predictably, and close to payday

- Follow up on unpaid invoices EARLY and REGULARLY

  - Have the attorney working on the case be the one to reach out

  - Give people an immediate and frictionless way to pay

  - Consider offering discounts for immediate payment remittance

LAWPAY
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Online payments in the age of COVID-19

Stories from
the front line

LAWCLERK

Thriving with Improved Law Firm Business Models

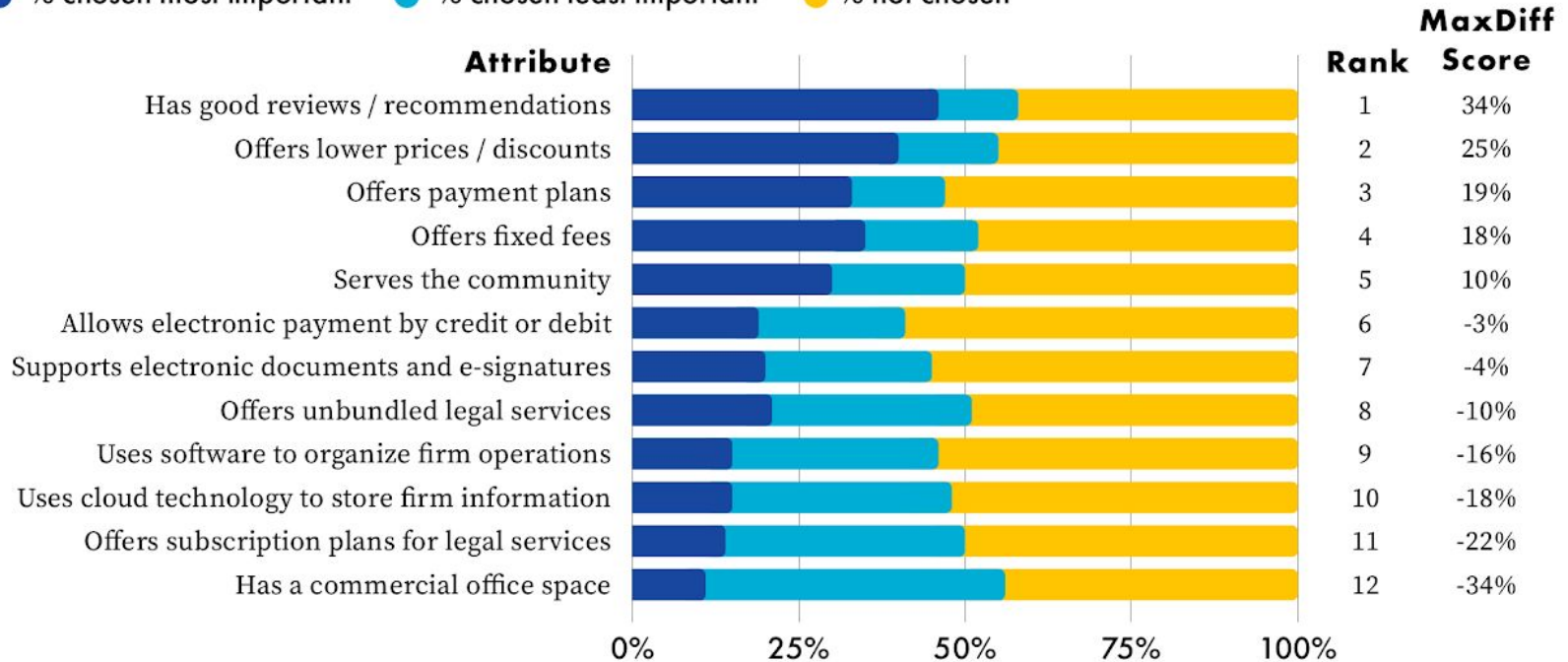# Now is our Chance to Do Law Better

CLIENTS WANT CERTAINTY

MaxDiff analysis on what makes a lawyer hireable according to consumers

● % chosen most important   ● % chosen least important   ● % not chosen

Attribute	Rank	MaxDiff Score
Has good reviews / recommendations	1	34%
Offers lower prices / discounts	2	25%
Offers payment plans	3	19%
Offers fixed fees	4	18%
Serves the community	5	10%
Allows electronic payment by credit or debit	6	-3%
Supports electronic documents and e-signatures	7	-4%
Offers unbundled legal services	8	-10%
Uses software to organize firm operations	9	-16%
Uses cloud technology to store firm information	10	-18%
Offers subscription plans for legal services	11	-22%
Has a commercial office space	12	-34%

0%   25%   50%   75%   100%

Clients Want Non-Hourly Billing

Flat Fees   *Unbundled Services*

Minimum Fees   *Subscription Plans*

Managing Growth

Modern Staffing

Why outsourcing makes sense

Grow your firm

Minimize stress

Make more money

Access expertise ...
and more!

On Demand Access to Top Talent

County
prosecutor
by day

Has her own
solo practice
in Texas

Retired Harvard
law grad who
loves to write

Former RN,
now full time
freelance lawyer

On Demand Access to Top Talent

Works at UN
High Commission
for Refugees

9th Circuit extern,
now bankruptcy
freelancer

Associate GC at
large bank
with JD/MBA

Stay at home
mom with 10+
years experience

LET'S DO THE MATH ...

- Flat fee project to freelancer: $1,000

- Hours worked 8.5

- Reasonable market rate: $200

- 8.5 x $200 = $1,700 billed to client

- Profit = $700

If you've been dreaming of a freelance career ....

Get in Touch!

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Questions?

Thank you for attending!