



Law Ruler

# LAW RULER'S ULTIMATE GUIDE

TO AUTOMATING MARKETING FOR YOUR LAW FIRM



Ensuring your law firm runs more smoothly with automation has never been easier. From time tracking to secure file sharing, legal technology is readily available to automate a majority of your law firm's basic operating tasks. Now, marketing automation makes it possible to streamline and optimize your legal marketing efforts, too.

If you're ready to automate your law firm marketing strategy but aren't quite sure where to start, a [client relationship management software](#) (CRM) can help.

In this guide, we'll discuss:

- What a legal CRM is and why your legal firm needs one
- How marketing automation will benefit your law firm
- Why you should incorporate a legal CRM, such as Law Ruler, into your marketing plan
- The best marketing automation features for your law firm
- How to implement [Law Ruler](#) and improve your law firm marketing today

## LEVERAGING YOUR LEGAL CRM FOR LEGAL MARKETING

### What is a legal CRM?

A legal CRM is a centralized database that you can use to track, organize, and automate communications with your potential, current, and former clients. These powerful tools can serve as a major driver for growth in your law firm by helping you nurture potential leads, onboard new clients, and foster stronger relationships with your most well-established clients.





With a top-quality legal CRM at your side, tracking leads is more efficient, communicating the significant value that your law firm provides is effortless, and scheduling follow-ups with potential clients is done for you. You'll also gain access to robust analytics dashboards that track revenue and demonstrate the return on investment (ROI) of your marketing efforts.

#### **Advantages of marketing automation for law firms**

According to the American Bar Association's 2020 Legal Technology Survey Report, less than half of all legal firms (of any size) have a marketing budget. The same survey indicated that although firms of one hundred or more Without the benefit of having dedicated marketing professionals in-house, legal marketing presents several challenges for small to midsize law firms. Fortunately, law firms can overcome those challenges with ease by adopting a legal CRM that includes legal marketing automation tools.



## FOUR BENEFITS OF AUTOMATING YOUR LEGAL MARKETING WITH A CRM

### 1. REDUCE THE TIME ATTORNEYS SPEND ON NON-BILLABLE TASKS.

Every hour that attorneys spend manually managing your law firm's marketing tasks is one less billable hour on the books. What if you could attract potential clients and nurture them throughout every step of your [sales funnel](#), without manually typing and sending countless texts, calls, and emails? How many billable hours would you save?

Automation frees up your attorneys' time so they can focus on doing what they do best: serving your clients.

### 2. ESTABLISH TRUST WITH POTENTIAL CLIENTS BY GIVING THEM A "PREVIEW" OF YOUR EXCELLENT SERVICE.

Timely, relevant emails, voice messages, and text messages show potential clients that your law firm is receptive and reliable. With automation, these key communications are delivered to leads promptly, no matter what.

By contrast, without automation to fill in the gaps, clients are sometimes forced to wait hours or even days for an attorney to acknowledge that your firm has received their request for a consultation. These clients are much more likely to move forward with another law firm that they deem more responsive to their needs.



### **3. PROVIDE POTENTIAL CLIENTS WITH PERSONALIZED CONTENT THAT DRIVES CONVERSIONS.**

Many law firm partners are hesitant to adopt marketing automation due to concerns that the messages generated by legal marketing automation tools might be too impersonal. However, a high-quality legal CRM can automatically personalize messages with information from your firm's contact and client intake forms.

Your automated marketing workflows can take into account a potential client's name, location, and specific legal needs. You can also use Law Ruler to nurture leads with value-packed content that's targeted to their specific situation. This automated legal marketing approach leaves your leads with the impression that your law firm is not only aware of their specific pain points but capable of providing exactly the legal services they require.

### **4. PREVENT LEADS FROM FALLING THROUGH COMMUNICATION CRACKS.**

While searching for a law firm, potential clients are more likely to favor attorneys that respond to their questions quickly. Delivering automated texts, emails, voice calls, and videos as leads reach key stages of your sales funnel keeps your law firm top of mind.

Plus, when client communications are closely tracked within a legal CRM, your team can easily identify the highest-value leads that might need additional nurturing to convert.



## MAKING A LEGAL MARKETING PLAN

Implementing a legal CRM with marketing automation features is an advantageous legal marketing strategy in 2022, but it's not enough on its own. Purchasing the best legal technology on the market is a great first step, but you won't get far unless you use it strategically.

If you want your legal marketing efforts to succeed, lay the groundwork by setting SMART marketing goals.

### SMART GOALS ARE:

#### Specific

Imagine you're asking someone for directions to an explicit destination and all they tell you is "West." Trying to find your way with such vague information would be guesswork, at best. Yet, if the person providing directions gave you a map, you'd be able to navigate with more trust.

Making marketing goals for your law firm is similar. Creating a plan to achieve a specific, detailed goal is less stressful and more efficient than simply aiming for a general outcome because it helps you to determine which steps you should take next.





## Measurable

Unless you make measurable legal marketing goals, it's impossible to determine whether or not your marketing efforts are actually successful. Measurable goals also make it possible to determine where your marketing spend is (and isn't) really paying off.

The marketing analytics included in a CRM empower you to track your law firm's progress.



## Achievable

"Shoot for the moon and land amongst the stars," is an optimistic cliché. However, it's not a suitable approach to legal marketing. Your team is probably much more motivated to strive toward goals they actually believe in. Ticking a goal off the list is also great for your law firm's overall morale.

When you're deciding whether or not a particular goal may be achievable, consider whether your law firm has the resources necessary to accommodate it. If the missing resource is time or people, adopting marketing automation software could make an otherwise impossible goal more doable.



## Relevant

To see true growth in your firm, your legal marketing goals need to tie into your overall business goals. For example, if you want to expand into a new practice area, you might set a goal to attract a certain number of clients that require that particular legal service.

## Timely

Creating a precise starting date and deadline for each of your legal marketing goals makes them more measurable. Meanwhile, setting a timeline for your goals creates a sense of urgency and drives more incentive than collectively aiming to finish them “someday.”

## EXAMPLE:

Imagine that your legal firm currently provides services to clients with slip and fall, automobile accidents, and wrongful death personal injury claims. Recently, though, your legal firm has started to accept clients with product liability claims. You’ve discovered that these cases require few non-billable hours and are quite profitable.





One SMART goal could be, “Convert 50% more potential product liability leads in the next quarter than the last quarter.” This goal is specific, measurable, achievable, and relevant. It also includes a timeline.

By contrast, “Get more engagement from potential personal injury leads,” is much less specific. This vague “goal” is more of a wish. It’s not relevant to the new practice area. It’s also too broad to measure and lacks a trackable timeline.





### **Tracking results: A necessary step in any legal marketing plan**

Spending time and money to set up marketing automation tools that don't even work for your business model cuts into billable hours and revenue. The only way to determine which steps of your current marketing pipeline are truly attracting high-value clients and generating a profit for your legal firm is to regularly track the results of your marketing efforts.

Fortunately, a law firm CRM's dashboard analytics offer instant insight into your marketing ROI so you can evaluate the success of your SMART marketing goals. Then, you can use that data to set new, more profitable goals.

### **Selecting the right marketing automation tools for the job**

Experts agree that building positive relationships is the key to law firm marketing success. Delivering relevant, timely messages to leads, new clients, and your existing clients is simple with a legal CRM—no matter how busy your attorneys get. Law Ruler's unique combination of CRM features plus legal marketing automation tools keeps your legal firm top of mind with potential clients. By making Law Ruler's legal CRM the foundation of your law firm marketing plan, you can foster better relationships at every stage of the sales funnel.



### Email marketing automation

A potential slip and fall personal injury client will respond to different messaging than a prospective family law client who's filing for divorce. Automating relevant, personalized email drip campaigns is an excellent way to show prospective clients that your legal firm has just the expertise they're looking for.

Delivering targeted content that's relevant to every lead's unique circumstances is an engaging way to prove that the attorneys at your law firm are industry thought leaders, capable of leading each client to a favorable outcome.

Although it's possible to develop an automated drip email campaign via email marketing software or SaaS email services, only Law Ruler provides a complete audit trail of all client communications. This data empowers your staff to collaborate with transparency, decreasing the likelihood of fumbling away a potential client due to inconsistent or missed communication.

98% of clients and prospects read their text messages, so meet those clients where they're at! Law Ruler is the only



### Text message marketing automation & voice calling campaigns

legal CRM capable of text message marketing automation and provides a number that potential clients can actually respond to with questions.

When potential clients respond to automated text messages sent from Law Ruler, those texts can be easily read from the CRM interface, creating a sense of transparency and accountability within your intake and marketing teams.



CRM software also tracks and prioritizes leads, so it's easy to determine which leads are most likely to move forward and should be called or texted first.

Pre-recorded videos and voice messages are another automated communication avenue that frees up billable hours while still providing personalized communication that's tailored to leads' needs.

### Automated follow-ups

Following up with leads and new clients is a core component of any successful legal marketing strategy, but these tasks are often neglected because of busy schedules and an overall lack of organization. The result is a major revenue leak. Clients opt to work with a competing legal firm instead of waiting for a response.

A robust legal CRM like Law Ruler makes follow-ups effortless with automated texts, emails, and voice messages that remind new leads of their next steps.





## Automated legal marketing workflows

Streamlining the entire legal marketing process with automation is possible—without the need for attorneys to become marketing masterminds overnight. Law Ruler’s automated legal marketing workflows guide your leads through your sales funnel and free up attorneys for billable tasks.

Law Ruler’s automated workflows also make it easy for any member of your team to determine each contact’s status at a glance, so your team can better serve every person that contacts your firm, whether they’re long-time clients that deserve a show of appreciation or potential leads in need of an extra nudge.

## Implementing your legal CRM and marketing automation tools

Schedule a **personalized, one-on-one** demo of Law Ruler today. Whether you choose to set up the software on your own or have our certified consultants tackle the job for you, we’re here to help you achieve your legal marketing goals!

To get the greatest ROI on your new legal technology, you’ll need a basic understanding of CRM best practices. Our world-class support team is available for live phone and email support, and our **FAQ video series** and **resource library** are available online 24/7. You can also access our virtual training and support forum to teach your team how to use Law Ruler most effectively as you automate your legal firm’s marketing strategy.

