

3 Ways to Streamline Client Intake

78% of leads move forward with the first business they connect with. Don't fall behind.

Start every new relationship off on the right foot by creating a more convenient, timely intake process with Law Ruler.

CLIENT INTAKE PROBLEM #1:

Intake is Time Consuming

Clients don't want to spend unnecessary time filling out questionnaires or providing their matter and contact information more than once.

THE SOLUTION:

Logic-based intake forms & document automation

Improve Intake Forms to Boost Leads

- Personalize and automate client intake forms with custom fields
- Securely collect and store client information for auto-population into documents and marketing communications
- Qualify or disqualify leads automatically
- Eliminate human error via document automation



CLIENT INTAKE PROBLEM #2:

Response Times are Slow

Your law firm is 100x more likely to connect with a new client if your response time is less than five minutes.

THE SOLUTION:

Automated texts

Quickly Capture Your Leads' Attention

- Stand out from slower, less responsive competition
- Texts can be personalized via the information collected by logic-based intake forms
- Leads can reply directly to the text
- Consultation scheduling and confirmation is easier



CLIENT INTAKE PROBLEM #3:

Getting Signatures is a Hassle

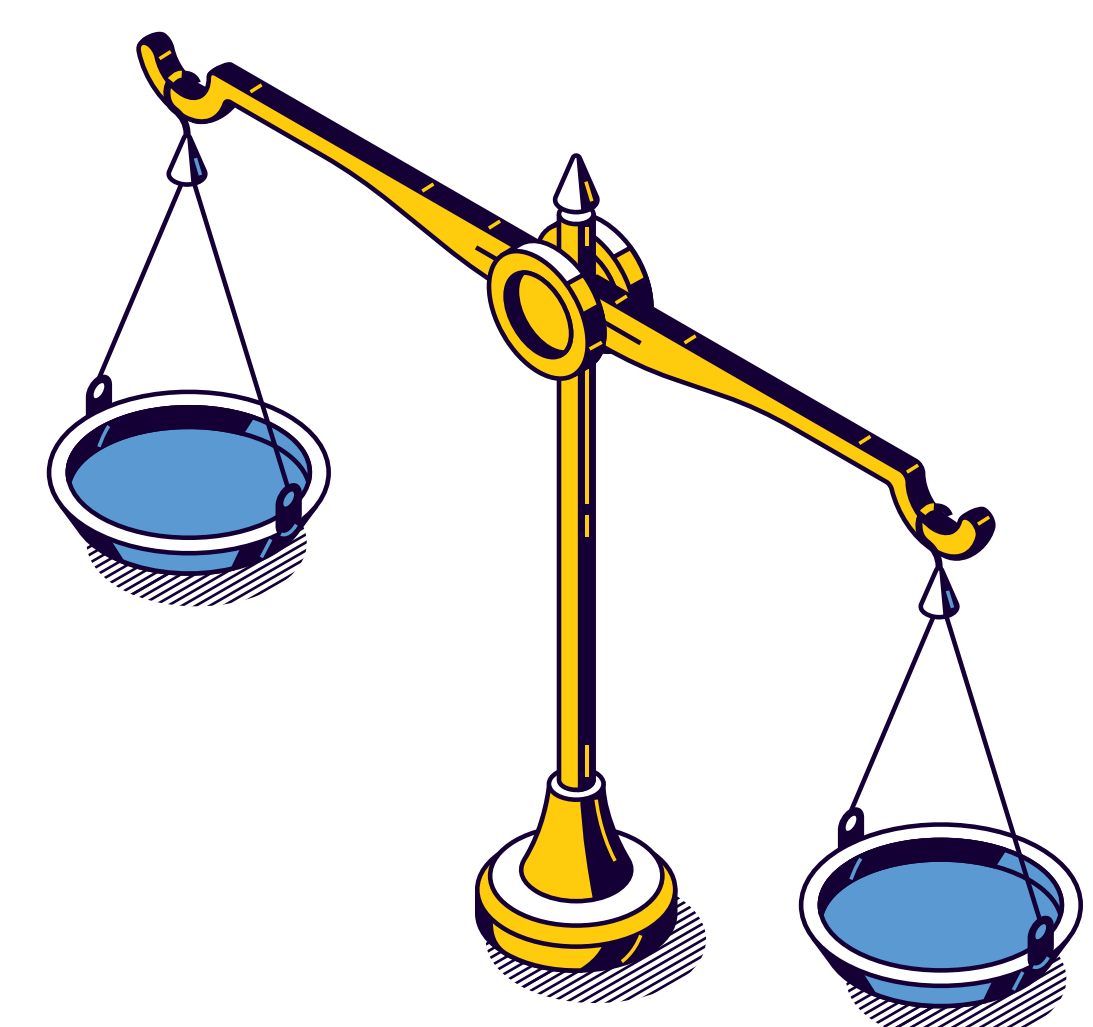
Collecting traditional paper and ink signatures is time-consuming and inconvenient for both attorneys and clients.

THE SOLUTION:

One-click e-signatures

Save Time and Get Peace of Mind

- Clients can sign and send on-the-go
- One-click e-signature is secure, ethical, and compliant
- Document automation and templates make drafting and sending agreements easy
- Frees attorneys to focus on billable tasks



Law Ruler's Legal CRM Meets Your Most Common Intake Challenges

With Law Ruler's robust legal CRM, your team can land more clients with less effort and in less time, leading to greater organization, time management, and profits for your law firm.

Contact us today to schedule a demo.

[Schedule a Demo](#)