Building a Sales & Marketing Funnel for Your Law Office

What makes a curious prospect become a loyal, satisfied client? To answer this, law offices need to build and refine a sales and marketing funnel that familiarizes prospects with your firm and the intake process.

Here's a look at common challenges your practice may encounter while optimizing each stage of the funnel, and how CallRail can help solve them.

Top of the funnel

Opening Arguments

Brand Awareness and Lead Generation

Where potential clients learn about your law firm. Ad campaigns, SEO marketing, and local search ads can help drive people to call or visit your site — hopefully kicking off the client intake process.

Key Challenges

- Fractured and costly media environment makes it more difficult than ever to target high-value, best-fit prospects
- Increased competition and costs for ad placements and keywords
- It's not always clear where to start, how to prioritize, or determine which marketing tactics are working

How CallRail can help

To improve performance at the top of the funnel, you need to know which campaigns, channels, and activities are working. With Call Tracking and Form Tracking, you can track what's delivering new leads — and what's not — to better optimize your current marketing strategy, cutting wasteful ad spend, and identifying high performing tactics. Furthermore, CallRail's deep integrations into your practice management tech stack can automate lead creation and extend those insights further, giving you the clearest picture of the client journey.

Middle of the funnel

Making the case and presenting evidence

Nurture leads & start the client intake process

Where prospective clients learn more about your law firm and areas of practice, and you build trust with them. In turn, it's a chance to learn more about the prospect as well, helping you deliver more relevant messaging.

Key Challenges

- Prospects and cases that are a poor fit take too much time to qualify, and don't convert
- Delayed response times cause prospects to search elsewhere
- It's unclear why prospects are calling in and how your staff is handling those calls

How CallRail Can Help

As conversations with prospects deepen, insights from these calls can help you qualify prospects, improve call handling, develop better messaging, and identify new marketing campaigns.

With CallRail's Conversation Intelligence®, you have transcriptions and analysis of every prospect call. Use keyword insights and sentiment analysis of prospect calls to uncover trends, pain points, common questions, and opportunities for better conversations and process improvements.

Bottom of the funnel

Jury deliberations and the verdict

Client Conversion

Where the final case is made for the value of your firm's services, important details like a retainer agreement, or terms of service are laid out to the prospect, who now choose whether to become clients or walk away.

Key Challenges

- An unorganized and poorly structured intake process creates a negative client experience
- Lack of visibility across multiple conversations with a single prospect can create qualification inefficiencies.
- Time-consuming or inconsistent follow-up to keep prospects engaged and moving down the funnel.

How CallRail Can Help

CallRail can help save you time at the bottom of the funnel by making it easier to improve your intake process to convert more prospects into clients.

Conversation Intelligence helps you evaluate leads with automated summaries and sentiment scores for every call. Convert Assist helps you convert more leads with AI-generated call feedback, customized next steps, and email follow-up drafts. Converting your best leads into clients has never been easier."

See how CallRail can supercharge your case pipeline.

Get started with a free 14-day trial today.