

# CallRail

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## Speed-to-lead:

How law firms can convert clients faster than ever

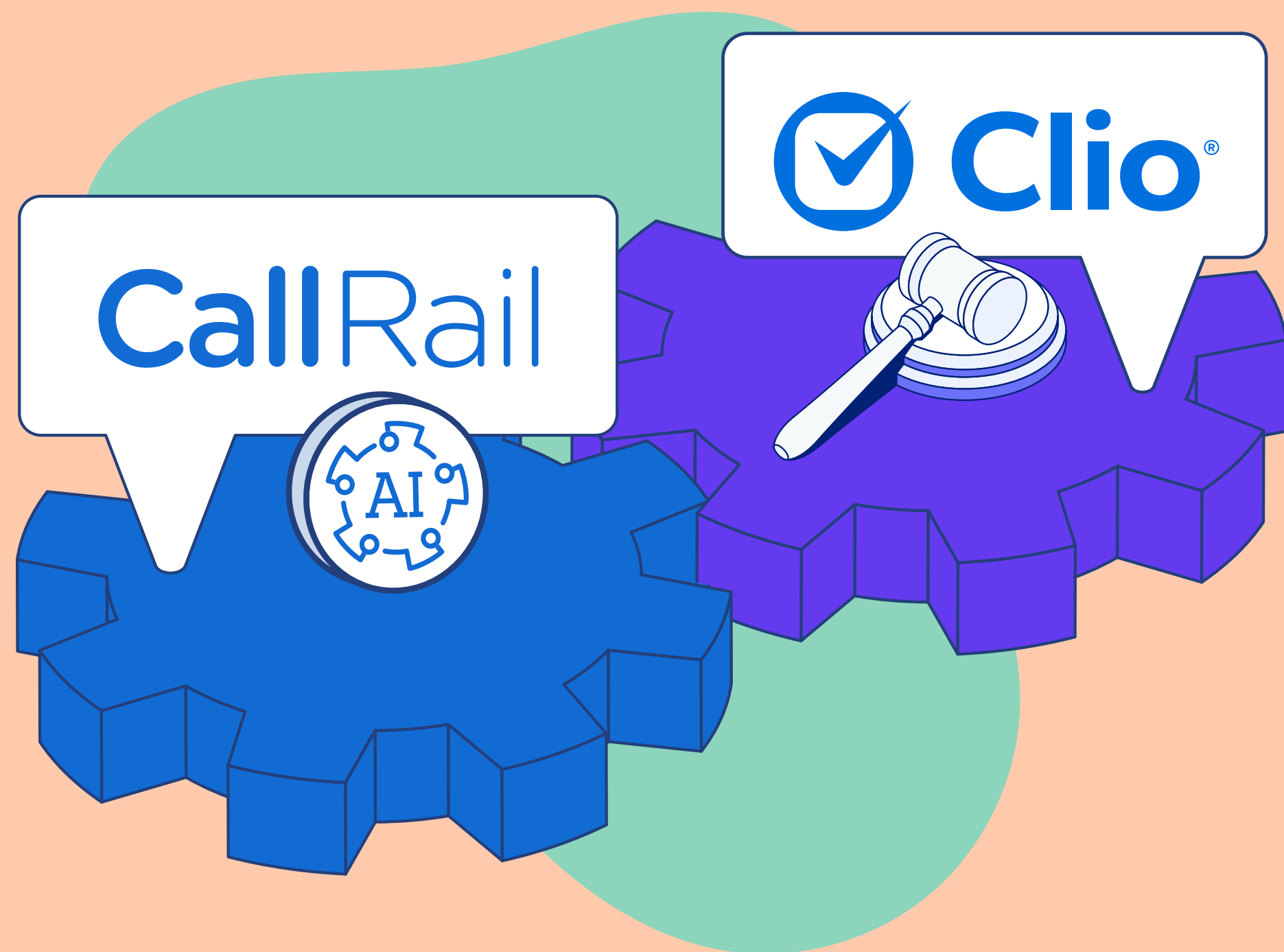


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## FORWARD PROVIDED BY CALLRAIL INTEGRATION PARTNER, CLIO



Success in legal practice goes beyond expertise—it's about being there when clients need you most. A firm's ability to respond quickly and effectively when a prospective client reaches out can mean the difference between securing a new case or losing it to a competitor. In today's dynamic legal industry, firms that embrace AI-driven tools and automation gain a decisive edge.

With features like call tracking and AI-powered follow-up, today's law firms can easily ensure no lead slips through the cracks. CallRail gives firms the power to automate routine tasks, track interactions with precision, and convert leads faster—all while maintaining a focus on high-value client service.

At Clio, we know speed-to-lead is an important competitive advantage. Together with CallRail, we're helping law firms meet the needs of their clients in a world where faster wins.

One of the most important metrics for the success of your law firm is your lead response time, also known as speed-to-lead. The faster you can respond to a prospective client, the more likely you are to clinch the case. Research shows that 78% of customers go with the first responder, but you don't need science to tell you this — just put yourself in your client's shoes.

So, how do you unlock the client insights you need to improve your speed-to-lead approach, win more clients, and provide a better client experience? Better yet, how do you do it efficiently?

This playbook is your guide to solving the speed-to-lead challenge.



# The 4 key steps to improve lead response times

For your clients, there's no such thing as responding too quickly. Seeking legal help is an uncommon, deeply personal, and, many times, uncomfortable experience. When they call you, it's because they need help fast. For you, following up with a new prospective client is one of many routine tasks to juggle throughout the busy week. For them, the divorce or accident they call to discuss is likely the most pressing issue in their lives. The longer you wait, the more likely they are to move on to a different firm.

In our recent report, the [2025 Marketing Outlook for Law Firms](#), 50% of law firms we surveyed reported responding to prospects within an hour, and nearly every law firm (98%) reported their clients were satisfied with their response times. But that's not what the phone call insights report tell us....

Our [call insights report](#) reveals that the legal industry has a high rate of missed calls, with a 28% missed call rate. This aligns with findings from [Clio's 2024 Legal Trends Report](#) which tested 500 firms using a secret shopper and found that only 52% answered or called back. The stark difference between how law firms view their performance and what the data reveals is a good indicator that there is room for improvement in the client intake experience. Especially in the age of online reviews, when no response can be much worse than a "no" response.

It would be nice if the advice here were simply, "Pick up the phone and call back faster than before," but there's a little bit more to it than that. Don't worry, though—taking this holistic approach will quickly pay off in better lead response times and better leads.



## Step 1



Identify lead types and origin

## Step 2



Stay on top of lead follow-up

## Step 3



Improve the conversion rate

## Step 4



Provide stellar case management to turn clients into loyal advocates



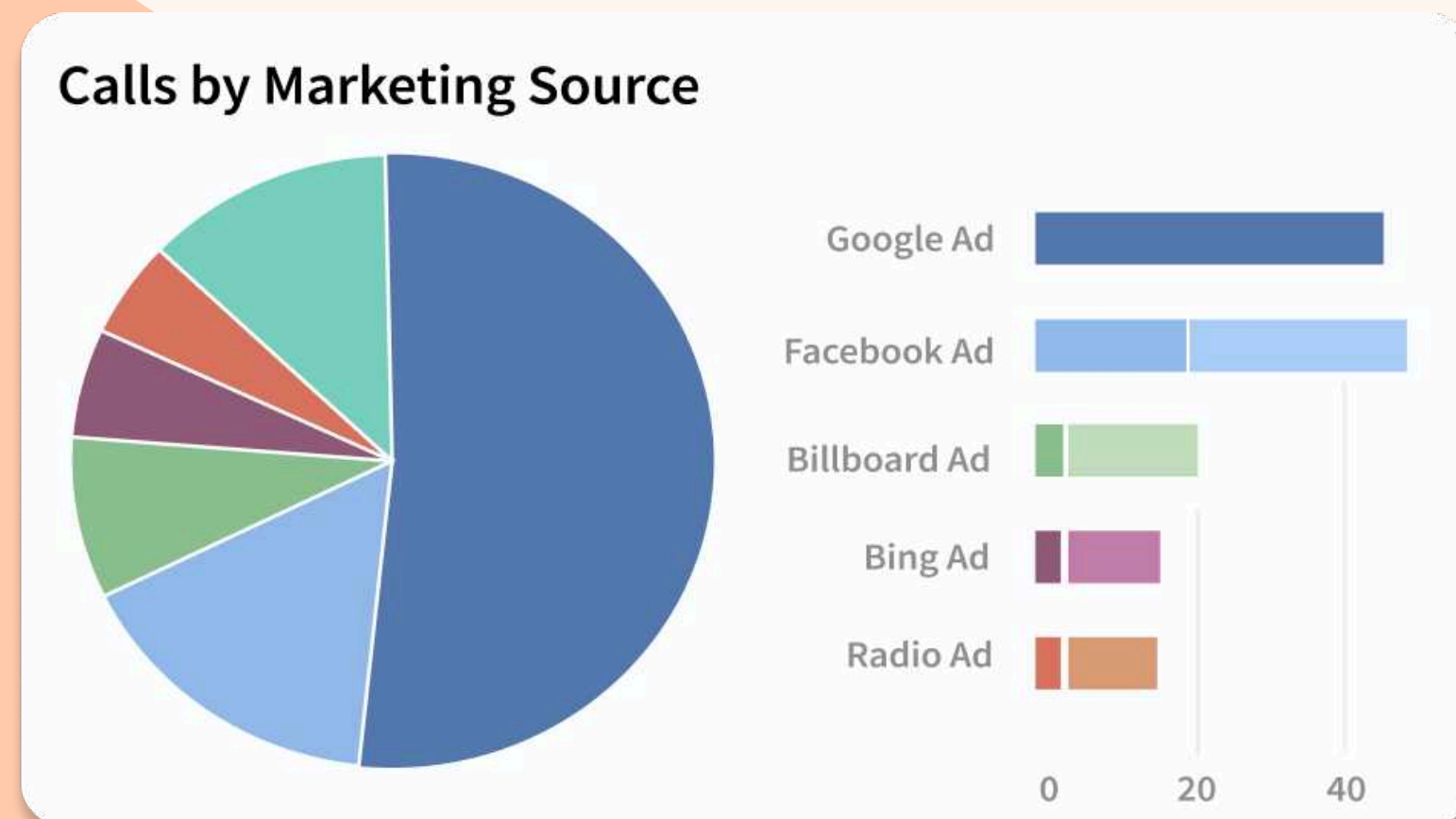
Any law firm can make marked improvements at each step and bring in more leads without sacrificing working on other cases. As you'll see, the right tools and know-how, combined with advances in automation and AI technology, can help solve your lead response time challenges and scale your business.

# Step 1: Identify lead types and origin

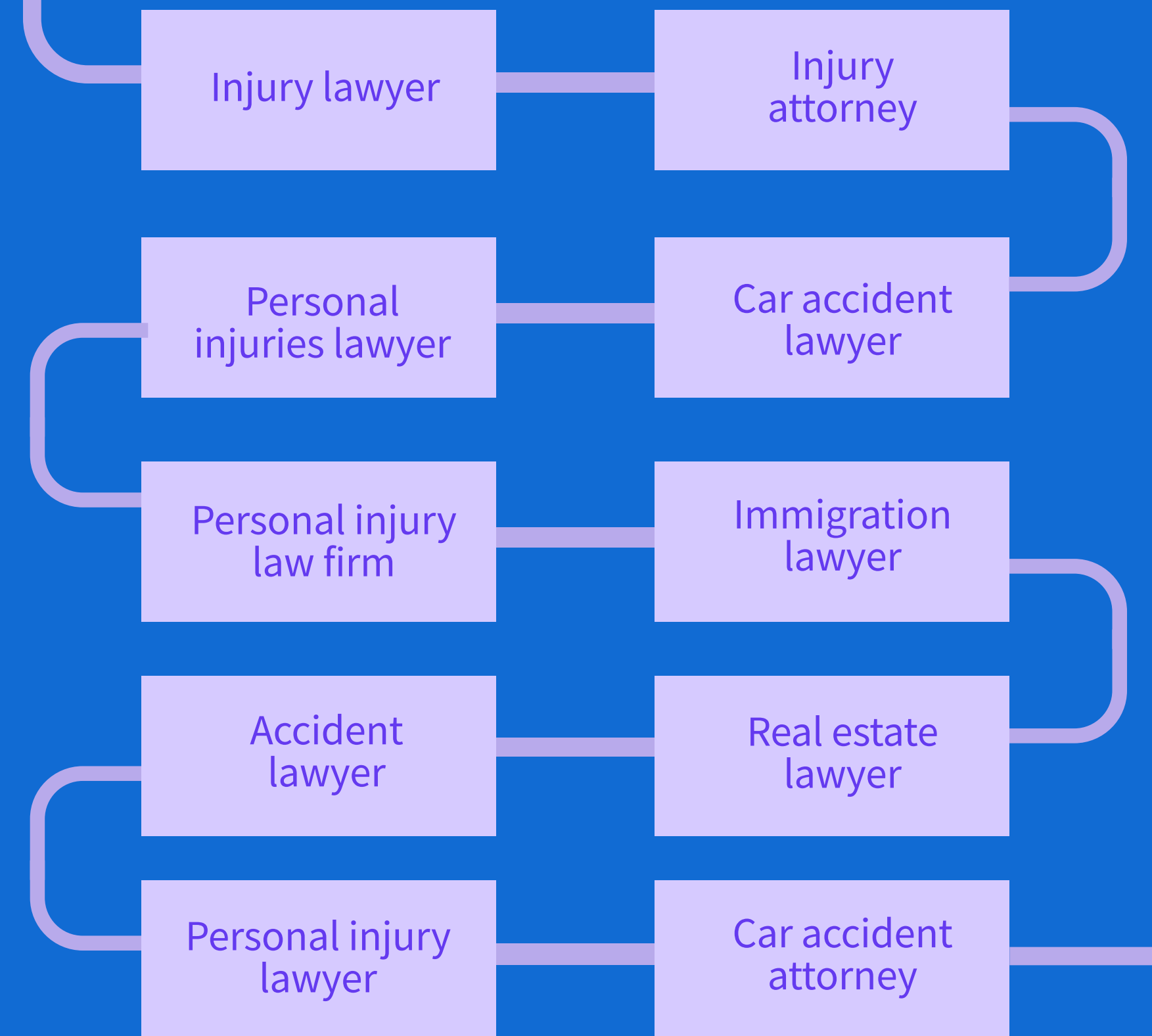
New clients don't just fall from the sky into your lap. Before they ever reach out, there is a wealth of data about your prospects, such as the campaigns, channels, and keywords that led to them reaching out to your firm — if you know how to tap into it.

The two most important pieces of information you need to improve your speed-to-lead:

- Where did the leads come from?
- What kind of lead are they?



## Top legal keywords based on insights from CallRail's research



Knowing the keywords your prospects use in their online searches can help you align your pay-per-click (PPC) ads and organic content marketing with the topics they're most interested in.

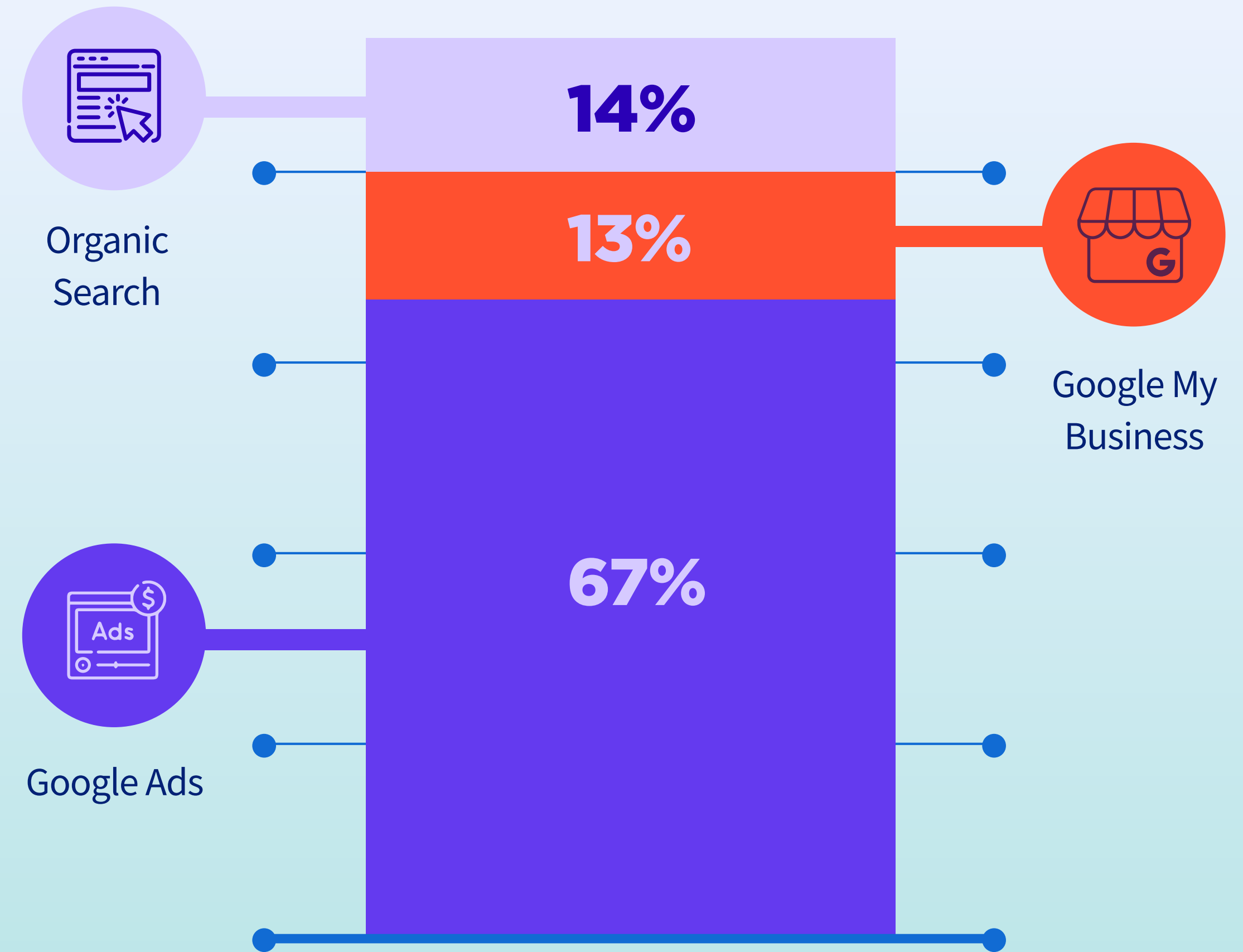
# Where did these leads come from?

Lead source is a critical data point for understanding your marketing performance and your prospects' experience with your firm before reaching out.

With [Call Tracking](#), you can see which channel, campaign, or search term led them to your firm. This is invaluable data for understanding what messaging and channels are most effective, letting you cut wasteful spending.

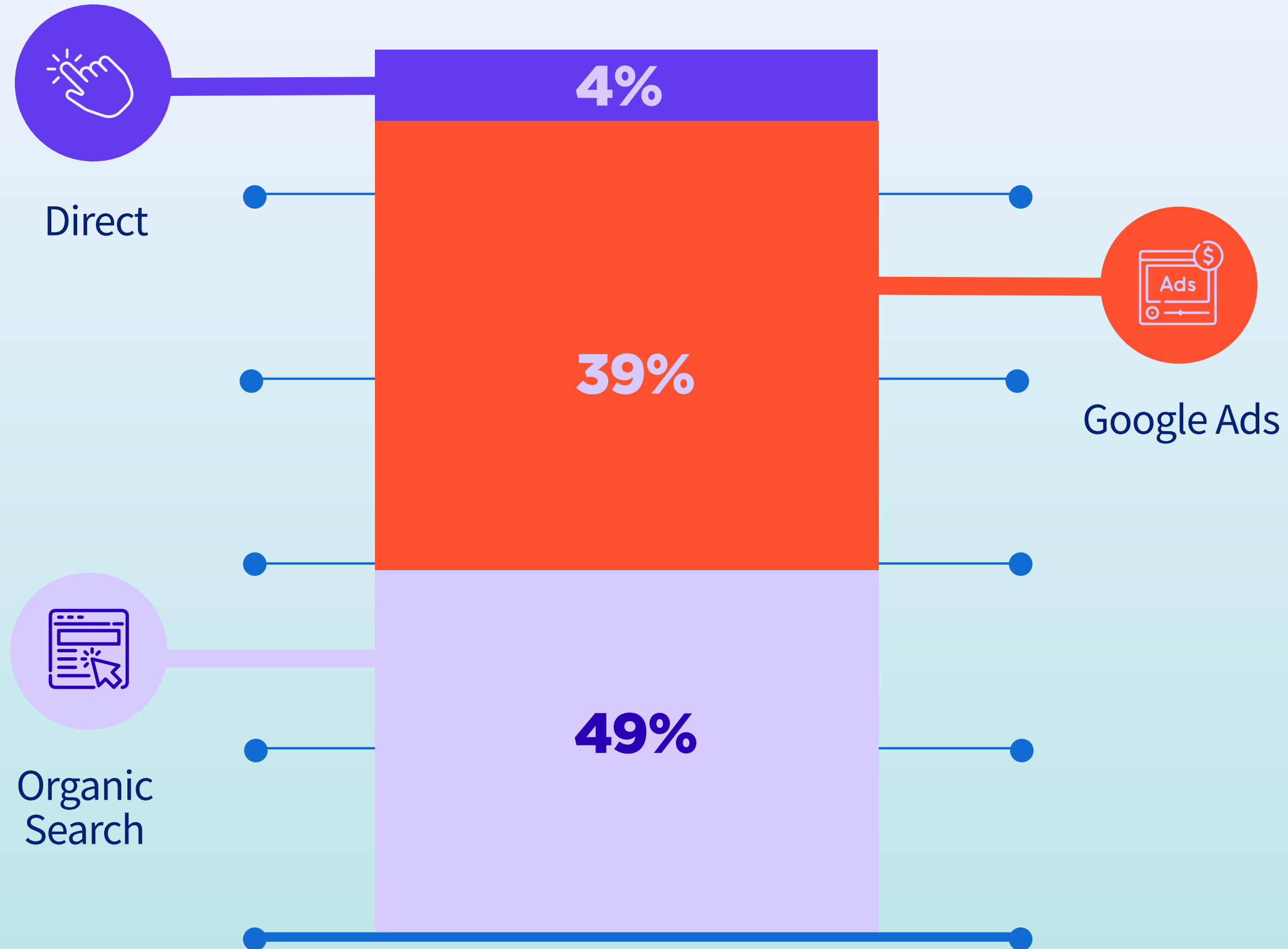
An analysis of nearly 100,000 calls to law firms highlights the critical role of organic search in legal marketing. For law firms, organic search and Google Ads drive the majority of qualified leads, outperforming other channels. But when you look at the next stage in the funnel — setting up a consultation — organic search becomes a more effective channel. Measuring each conversion point and tying it back to source data is critical for seeing the whole story.

## Top 3 Sources Driving Qualified Leads for Law Firms





## Top Channels for Generating Consultations for Law Firms



## How do you tell a good lead from a great lead?

Knowing where a lead came from is only half the equation: being able to quickly tell a hot lead from a cold lead and a workers' compensation case from a mesothelioma case can help you focus your responses. You can prioritize without reading every email or even listening to every voicemail.

With AI-powered Call Tracking from CallRail, you can use automation rules to qualify your calls and form submissions based on criteria you select, such as lead source or high-value keywords in the transcripts.

The Botnick Law Firm, a DUI and criminal defense firm in Cleveland, Ohio, used CallRail's call summaries to quickly spot and prioritize great leads and avoid losing out on a likely client. The firm was also surprised to learn they were generating unqualified leads from prospects searching for legal help in one of the two dozen other Clevelands in the U.S. By identifying that with CallRail, they were able to refine their SEO to exclude those places and prioritize their spending to only attract local leads to their firm.



“One issue we encountered was people calling for a Cleveland criminal lawyer. We’re practicing in Cleveland, Ohio, but there are Clevelands all over the place. With this data, we could adjust our SEO settings and block out certain geographic locations so we were attracting the right clients.”

**Robert Botnick, Founding Partner of The Botnick Law Firm**

Botnick Law Firm’s experience shows how paying attention to where your leads are coming from and what kind of leads they are allows you to focus your marketing dollars and your time and provide better client experiences when it matters most.



# Step 2: Stay on top of lead follow-up

You miss 100% of the clients you don't follow up with. It's an obvious statement, but it's also a guiding principle for law firms looking to grow their business. The more leads you can follow up with, the more clients you can bring on board.

52%



The percent of law firms that answered or returned a phone call, according to a secret shopper survey of 500 firms (Clio)



Maria Rodriguez  
maria@email.com  
Source: Organic Search



### Call summary

Inbound call on Feb.6 4:44pm

Maria called to schedule a consultation due to an **injury** she suffered in a car accident. She lives in Chicago and wants to meet **within the next week.** Maria indicated her **neighbor** had a successful case because of your law firm.



Convert Assist

Action plan   Smart follow-up   Coaching

Subject: Griffin Law Group Follow Up



Hi Maria,  
Thank you for your call today. There are just a few final steps before we can...

Regards,  
Patty P.



Clio Grow and CallRail work together to streamline lead management and follow-ups. Clio Grow's automated intake process ensures no lead slips through the cracks, while CallRail's AI-powered insights help prioritize high-value calls. By integrating both solutions, firms can automatically capture, categorize, and follow up on leads, and know exactly where the lead came from — making it easier to optimize marketing and improve the client experience.

Whether you're juggling a lot of clients on your own or handing the clients off to multiple people in the office through the intake process, Call Tracking and AI tools can streamline the experience. Phone calls are recorded and transcribed for full review before a follow-up call. Or, use our powerful AI to generate short 3-5 sentence call summaries to quickly catch up between meetings.



AI and automation help law firms spend 50% less time qualifying leads. ([CallRail](#))

Take things one step further with CallRail, which generates smart, context-aware responses based on your phone conversations. When a call ends—or even if it's missed—CallRail automatically drafts ready-to-send messages for quick re-engagement. Whether via text or email, these AI-generated responses can be sent with just a click, ensuring no lead or client request goes unanswered.

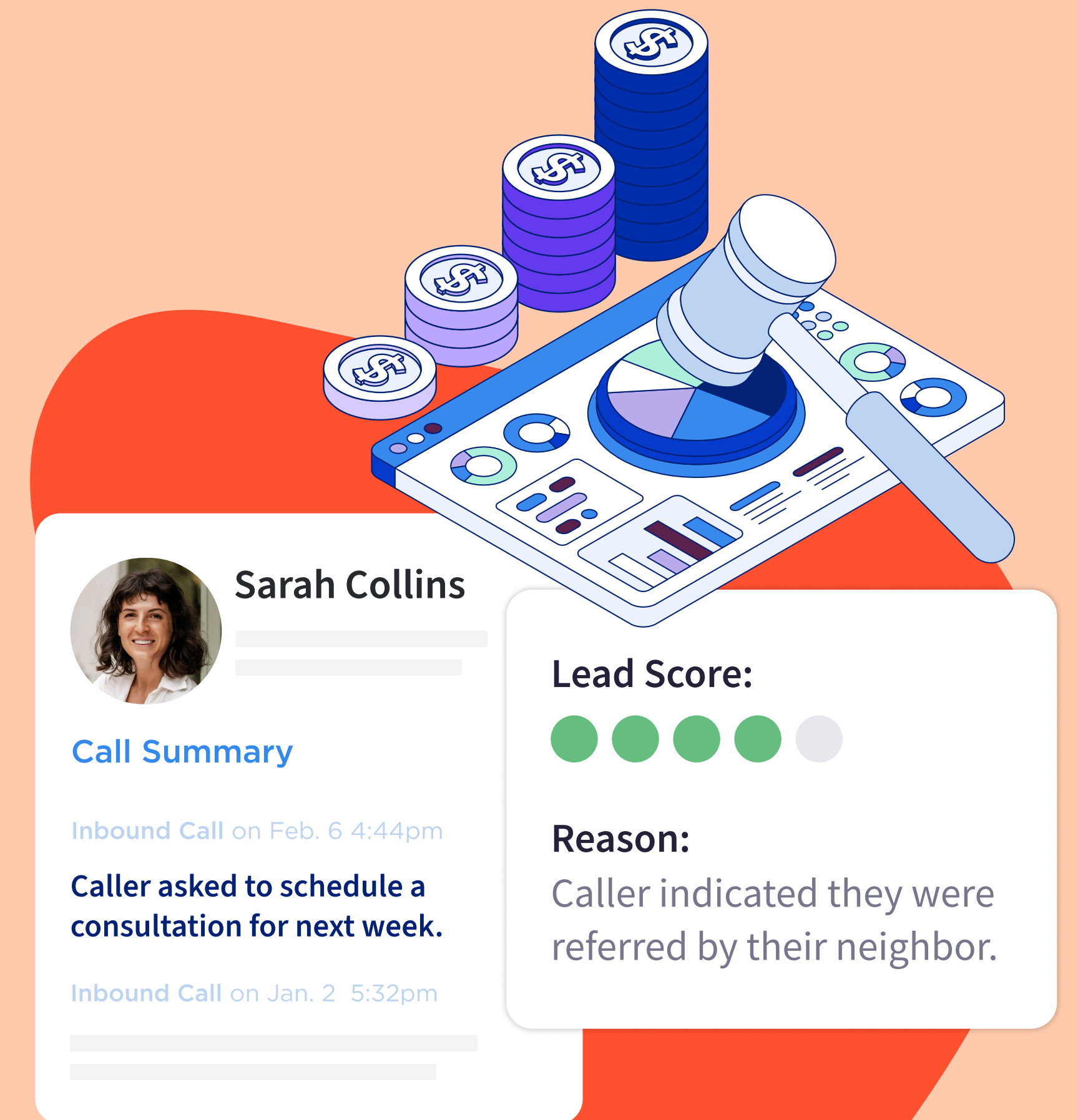
Need to make a call back? CallRail provides a personalized call script, so your team can pick up where the conversation left off — without scrambling for notes on a random legal pad. By automating follow-ups, Convert Assist helps you engage prospects faster, reduce response times, and convert more clients with limited effort. That means you've got more time to work on cases, follow up with more leads, or even take more than five minutes to eat your lunch.

# Step 3: Improve the conversion rate

There's nothing worse than investing your precious time following up with a prospect, only to lose out at the finish line. Increasing your conversion rate ensures you get more clients and that your marketing dollars are spent efficiently, generating revenue for the practice.

One way to do this is by ensuring seamless integration between your key technologies, like intake tools, CRMs, and call tracking. Clio Grow's automated intake tools help law firms onboard clients faster by eliminating manual data entry, scheduling consultations, and tracking lead progress. When combined with CallRail's AI-powered call summaries and lead scoring, law firms can prioritize their most urgent cases and improve conversion rates with less effort.

But improving your conversion rate requires more than just the right tools — it takes having the right conversations with clients. According to [Clio's Legal Trends Report](#), 73% of secret shoppers had bad client experiences during the intake process and wouldn't recommend the firm. On top of that, the firm's website was not helpful, as 70% of shoppers couldn't easily understand the process of hiring a law firm.



Providing a better client experience at the critical point of converting from prospect to client requires better service from your team. With call coaching, busy firms don't have to sacrifice untold hours to monitor customer service performance. Using AI to analyze your team's calls, this Convert Assist feature provides actionable advice for improvement, so your team can improve the client experience and convert more leads to clients.



## Coaching feedback might include suggestions like:

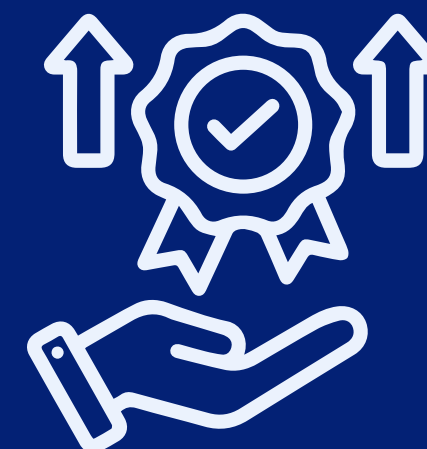
### Positive:



You provided clear answers to the caller's questions about services and processes.

You successfully scheduled a follow-up consultation.

### Areas to improve:



Avoid reading scripts word-for-word. Try to sound more natural.

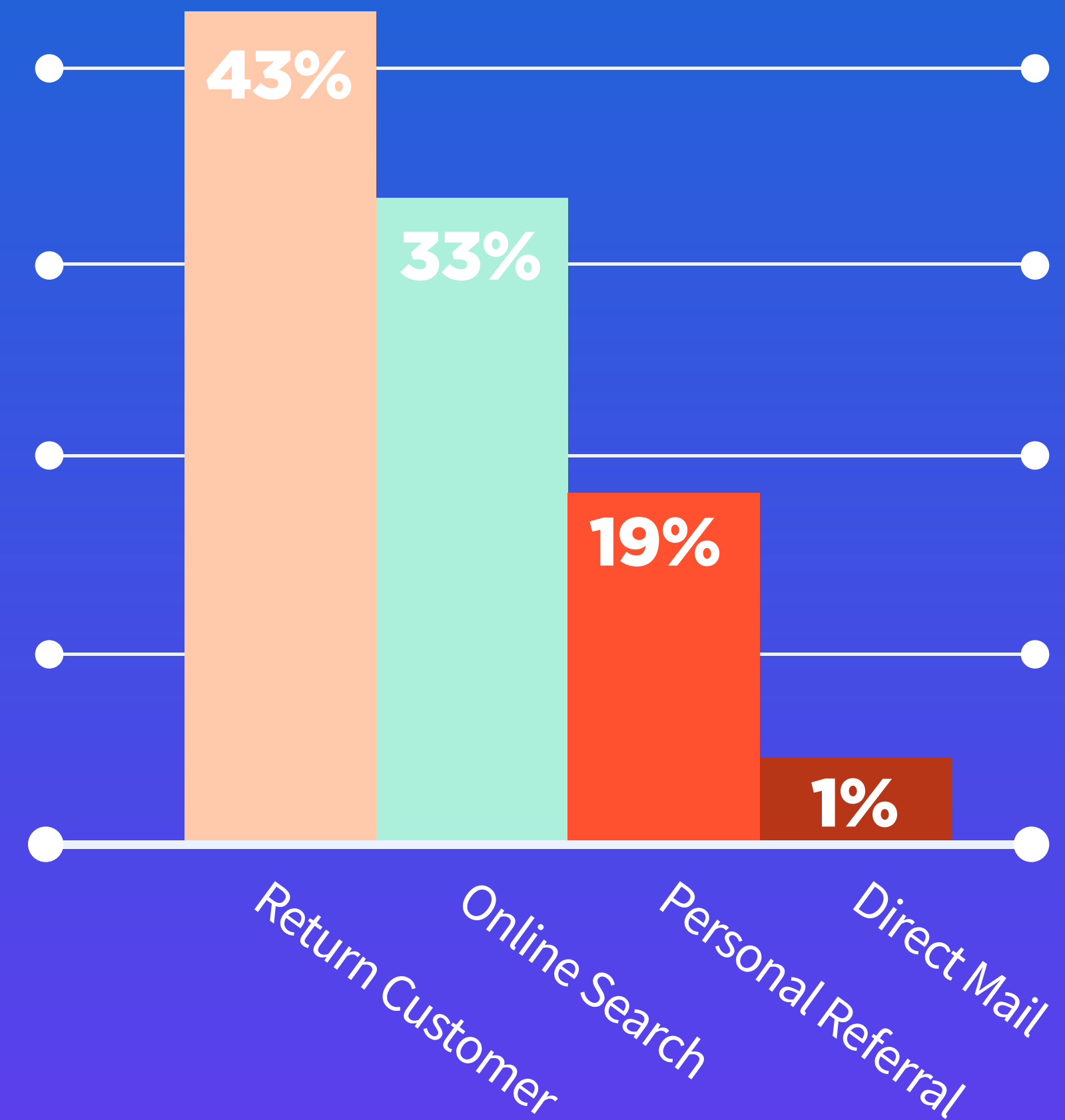
Cite the number of past clients and years of experience to help build confidence.

# Step 4: Provide stellar case management to turn clients into loyal advocates

A strong client intake system doesn't end when a case is closed — it extends into ongoing client relationships. With Clio Grow's automated follow-up tools, firms can stay connected by sending email updates, requesting reviews, and encouraging referrals, all of which help generate repeat business and build long-term loyalty.

This investment in client retention pays off. Acquiring a new customer is 5 to 10 times more expensive than retaining an existing one. Findings from our call insights report further emphasize the value of these relationships — 43% of the leads we analyzed for law firms were returning clients, while 15% came from personal referrals.

Self-Reported Attribution by Channel for Law Firms



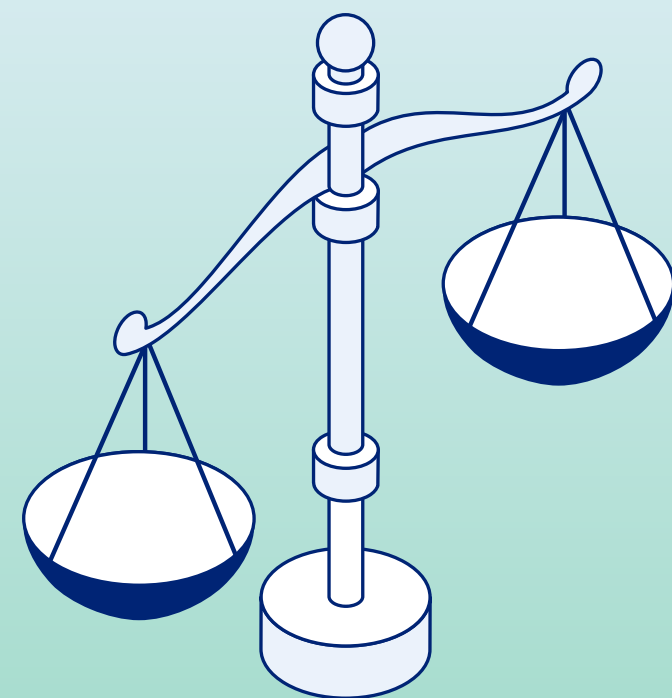
Hi, is this Griffin Law Group? You **represented my neighbor** in their injury case from a car accident and I'm interested in scheduling a consultation for my injury from a recent car accident.

It is 5-10x more expensive to acquire a new customer than to sell to a returning customer. ([BIA Advisory](#))

Amy Willis  
Source: **Organic Search**  
Reported Attribution:  
**Personal Referral**

However, many law firms struggle to capture this data. In contrast to a source like Google Ads, returning customers and referrals must be self-reported by clients and tracked by the intake rep. The under-reported data can mean you're planning your marketing strategy around attracting new clients when in reality, you need to focus on the post-client experience.

Pro-Tip: CallRail's AI-powered self-reported attribution feature captures when your lead shares how they found your firm and seamlessly blends it with your digital attribution to give you a full picture of your client's journey.



After all the effort you put into delivering the experience and outcome your client wants, there are a few simple things you can do to build loyalty and keep high-quality leads coming into the funnel.



Stay in touch with your past clients with an email nurture program. This will keep them up-to-date on your practice, and top-of-mind the next time they need legal advice.



Ask for reviews on Google and Yelp from satisfied clients to increase the number and average rating for your business.



Encourage word-of-mouth marketing with a referral program.



# Got the need for speed?

See how fast CallRail can make an impact on your firm's ability to bring in leads and convert new clients.

**Start your free 14-day trial today**



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