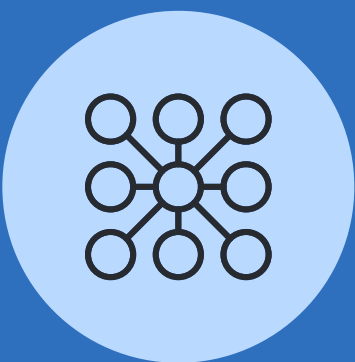


# 4 steps to improve your law firm's intake process



Without a documented and consistent process, client intake can be chaotic and unreliable—becoming a black hole for leads. Improve your law firm's operations and create a better client experience by following these steps to simplify your client intake process.

## 1. Generate and nurture leads



**Be strategic**  
Identify your ideal clients so you can generate more leads like them.



**Gain visibility**  
Publish ads and offers that make it easy for clients to find you.



**Return calls**  
Minimize missed calls and don't leave leads hanging. [Send quick text responses](#) to let potential clients know they are seen and appreciated.



**Target qualified leads**  
Tools like [CallRail's Conversation Intelligence](#) helps recognize and prioritize promising leads.

## 2. Set up initial client meetings



**Screen potential clients**  
Use an intake form and call recording tools to ensure they fit your ideal client profile, so you can qualify or disqualify leads faster and more easily.

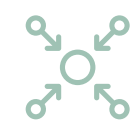


**Automate confirmations and reminders**  
Demonstrate your professionalism and increase the odds they will attend the consultation.



**Follow up**  
Contact leads after the initial consultation to send necessary documents like fee and representation agreements.

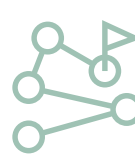
## 3. Manage leads



**Centralize contacts**  
Automatically collect and store lead information from all sources in one convenient location with [CallRail's interaction timeline](#).



**See client histories**  
Check for contacts' past activities to inform conversations.



**Track the journey**  
Use tools like [Call Tracking](#) and [Form Tracking](#) to learn more about clients' journeys.

## 4. Analyze and optimize



**Record calls**  
Highlight keywords and review intake calls to improve conversations.



**Transcribe and analyze calls**  
Conversation Intelligence will show which ads, keywords, and offers are most effective.



**Find insights**  
See which sources generate leads and why some clients become clients and others don't. Use data to optimize your marketing activities.

## Discover how CallRail's lead intelligence platform can improve your client intake process.

CallRail helps you market with confidence, generating and capturing leads, communicating with prospects, and turning those prospects into clients.

[Try it now for free →](#)

