

Guides Created By Akeem Oluwasegun

Stop the Frustration: 7 Things Holding Back Your CRM and How to Fix Them

- **Prepared for:** solo lawyers and lean legal teams who are tired of wasting time and money
- **By:** Akeem Oluwasegun. | Legal Technology Specialist | Founder of HakeemSolutions LegalOps
- **Date:** 20/06/2025

Here's a breakdown of problem you might be facing and solution to it

Introduction

Does this sound like you?

- Your CRM is full of features but feels too complicated
- You're still doing intake and follow-up manually
- You paid for features you never use
- You can't get clean documents out of your system

 *You're not alone.*

This short guide breaks down the *real* reasons law firms struggle and what you can fix right now (without switching platforms).

7 Common Legal CRM Problems

1. **Wrong merge fields in documents**

- Why it happens: incorrect or missing tokens
 - Quick fix: test using preview mode + correct token names
2. **Too many unused features**
 - You're paying for 10 tools and using 2
 - Solution: focus on 3 core needs — intake, document, follow-up
 3. **Overpromised support**
 - Some vendors don't train your staff properly
 - Fix: hire a legal tech consultant or get 1:1 training
 4. **Manual workflows everywhere**
 - Re-typing emails, copying contact info, chasing tasks
 - Fix: set up automation triggers (client signs → doc sent → task created)
 5. **Buying tools that don't match your practice**
 - Immigration firms using tools built for litigation?
 - Fix: customize fields and workflows, or switch to niche tools
 6. **No one checking the status page**
 - System bugs? Delays? You're not even aware
 - Strategy: check CRM status weekly (e.g. Filevine status page)
 7. **Confusing team onboarding**
 - Your staff doesn't know what to click
 - Fix: create SOPs or hire someone to build walkthroughs
-

What You Can Do Next

Here's how to start fixing your CRM without getting overwhelmed:

✅ Focus on 3 areas first:

1. **Document Automation**
2. **Workflow Setup**
3. **Client Intake + Follow-Up**

✅ Use tools like:

- Zapier (for automation)
- API integrations (if needed)
- Embedded forms for leads

✅ Ask for help early don't waste months trying random fixes

Let's Fix Your CRM

If this guide sounds like your daily struggle, don't stress.

I help legal professionals:

- Audit your CRM
- Automate client communication
- Clean up your workflows
- Make your tools simple to use

👉 **Want a free 15-min audit or quote?**

Gmail: akeemtijani987@gmail.com