



## *The Straightforward Breakdown for Law Firms*

### **Q1: What exactly does a legal CRM do?**

A legal CRM (Client Relationship Management system) helps your firm manage every stage of your client journey from first contact to case closed.

Key features include:

- Lead tracking + intake forms
  - Task management + workflows
  - Automated follow-ups + reminders
  - Document generation
  - Pipeline visibility (what's pending, what's moving)
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### **Q2: Is it just for intake?**

Not at all. Intake is just the beginning.

With the right CRM, you can:

- Assign tasks based on practice area
  - Trigger emails/texts when a case stage changes
  - Set automatic reminders for staff or clients
  - Generate contracts or fee agreements instantly
  - Track referrals, closed cases, lost leads, and more
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### **Q3: Is it too expensive for a small firm?**

Many CRMs offer affordable plans for solos and small firms. And when used right, they pay for themselves through:

- Time saved
- Fewer no-shows or missed follow-ups
- More closed leads
- Better team coordination

Even 1–2 hours saved per week is worth it.

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## 💡 Q4: Which CRM is best for my firm?

It depends on:

Firm Size	Top CRMs to Consider
Solo	Clio Grow, PracticePanther, Lawmatics (Starter)
Small (2–5 users)	Clio Suite, MyCase, Lawmatics
Medium (5–15)	Filevine, Smokeball, Lawcus, Clio + Zapier
PI/Immigration Heavy	Filevine, Law Ruler, CasePeer

Need help choosing? I'll recommend based on your practice type, team size, and what matters most (automation, intake, tracking, etc.).

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## 💡 Q5: What if my staff won't use it?

Most resistance comes from:

- Tools being too complicated
- Poor training
- Lack of customization

✅ I help law firms set up CRMs *the right way* customized to their real daily workflow, simplified for the team, and with automation already in place.

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## 📦 Want Help?

- ✉️ DM me “CRM Setup” and I'll personally:
- Recommend a CRM based on your practice
  - Share 3 automation ideas you can implement in 1 day
  - Walk you through the setup (or do it for you 🧑🏻)