



**SIMPLE** LEAD TRACKING FOR LAW FIRMS

# CASE STUDY

Before Lead Docket, our intake department was comprised of 2 full time employees and one backup employee. Before Lead Docket, we were considering hiring a third full time intake specialist. After implementing Lead Docket, intake is now efficiently managed by two employees. The removal of the time consuming clerical duties allows our intake team to concentrate on simply qualifying the cases we want and getting them scheduled.

We often have a high number of after hours leads, particularly on weekends. This made Monday mornings somewhat chaotic as these leads needed entered as new calls were coming in. Previously, it could take as long as 90 minutes to process 8 after hours leads. Now that same task takes as little as 15 minutes.

On average, we have increased our sign up numbers by 20 to 30 percent in the first few months after implementing Lead Docket. We hit an all-time record in September 2017. While there are many external factors that affect our business, Lead Docket has certainly contributed to our intake team capturing these new leads more efficiently. We rarely, if ever, lose track of a lead now. We're certain we were losing leads due to the inefficiency of our systems in the past and feel that concern has been eliminated by using Lead Docket.

Lead Docket has significantly simplified our lead-tracking system. We're no longer calling around to the paralegals and attorneys' offices trying to find out what happened to a "No Show" or a "Re Schedule". These were the kinds of leads that would frequently end up getting lost with time. Now, anyone who is party to a lead can use the Notes and Messages function in Lead Docket to track it. This has saved us an immense amount of time and has absolutely prevented the loss of good leads.

Because of Lead Docket's efficiency, our intake team is now far better equipped to qualify new leads. They're spending less time with manual spreadsheets and much more time on the important tasks – qualifying and capturing each and every lead. They can even afford to spend more time on the phone with each lead as they talk them through details.

We now have a clear, streamlined referral system. Previously we had referred out hundreds of potential clients but couldn't find an efficient way to monetize this. The idea of additional spreadsheets, follow ups, and tracking was being pushed down the priority list due to time/staff restrictions. Lead Docket has allowed us to implement a referral system with barely any impact on the Intake Department. Over the past 6-7 months, we have had hundreds of referrals reviewed, resulting in over 90 new clients signed up with other law firms.

The ability of Lead Docket to generate maps with Scheduled appointments may seem like an "extra", but it allows us to immediately locate their homes and work so we can quickly refer them to the best medical professionals in their area.



## **FOCUS**

Personal Injury Law

## **TIMEFRAME**

March – September 2017

## **LOCATION**

Salt Lake City, UT

## **CASE MANAGEMENT SYSTEM**

Needles

## **Attorneys**

18

## **CONTACT**

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