



**SIMPLE** LEAD TRACKING FOR LAW FIRMS

# CASE STUDY

Before switching to Lead Docket, our firm had used a variety of intake solutions, ranging from our own spreadsheets to various CRM software solutions, including ones geared to law firms. At the time I first became aware of Lead Docket, we were using one software that assisted us in following up on leads and had some reports that were very helpful. We had integrated email follow up as well. I was willing to demo Lead Docket but I wasn't anticipating making a change. After seeing it in action, I was convinced it would increase our signed clients.

I was a little worried about moving to a different system, as staff training can take some time and can cause some discontent. I prepared the intake staff to go through a demo so I could see what they thought. I made clear to them that we weren't going to consider a switch unless we all believed it would be worthwhile. Everyone was blown away by the intuitive design and ease of use and were unanimous about making a switch. Training was easy and quick as the software is very intuitive. It did help that we were already familiar with CRM software and the basic templates and phases needed only a little tweaking to fit our system. Cameron was great to work with and prompt in resolving any concerns or requests of ours.

Lead Docket has everything we liked about our past software plus other things that we wanted but couldn't get. The texting and email follow up templates are easy to design and implement. The automated follow up tasks help our intake team stay on top of leads and has increased our conversion rate. The dashboards make it easier for our team to communicate about specific leads and keep up with leads that need follow up or an attorney review. The texting feature adds an extra layer of communication with potential clients that has also resulted in high retention.

I really appreciate the enhanced reporting features. Reports are easy to set up and automate. I get weekly and monthly reports in my email inbox, but I also can go directly into Lead Docket and quickly drill down to see more details about a particular lead source or marketing campaign. After using Lead Docket for 6 months, we are even more comfortable with our decision. Retention has increased and I was better able to identify lead sources that were underperforming at the end of the year and make adjustments that will save us money next year.

The integration with Filevine is an added bonus that has reduced hours of repeat data entry. It also behaves in a similar fashion to Filevine, which probably helped the transition and made training easy.



## **FOCUS**

Personal Injury

## **TIMEFRAME**

June 2019 - Present

## **LOCATION**

Little Rock, AR

## **CASE MANAGEMENT SYSTEM**

Filevine

## **Attorneys**

6

## **CONTACT**

Alan LeVar

[alan@levarlaw.com](mailto:alan@levarlaw.com)

