4 CRM Options Built for Lawyers

A few months ago, I wrote a blog entitled "Choosing Law Firm CRM Software? Here are the Pros and Cons of Each Option." That blog focused primarily on case and practice management systems, most of which do not include a true customer *relationship* management (CRM) component. I received several comments from readers asking for recommendations for bona fide CRM systems. In this blog, I focus on those platforms that are known for their CRM capabilities.

What Is CRM?

Customer relationship management software is a tool that helps you manage your business relationships effectively. Not only does the right CRM software assist with the logistics of handling your client relationships (including automated contact management and progress tracking), but it also allows you to manage leads and extract data to help you analyze relationships, your pipeline, and your success rate with leads and clients.

Implementing a law firm CRM system is one of the best ways to maximize your revenue. Using a CRM platform will ensure that every single lead gets tracked and will increase the likelihood of retention by streamlining communications.

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Which CRM System Is Right for You?

When researching CRM systems, it's important to answer the following questions before you dive in:

- What are your goals for the system?
- What core features are important to you?
- What customization needs do you have?
- Will the software interface with other software you already use?

Here are four CRM systems that are designed specifically for attorneys and law firms. Note that there are also many generic CRM systems out there that, with customization, may work for your firm (Nutshell, ZohoCRM, SugarCRM and Pipedrive are just a few), but I am not reviewing those here.

(This list was compiled by reviewing the product website, multiple product reviews and user reviews. The product specifications listed are the most up-to-date details to our knowledge, but keep in mind that software developers are constantly updating their products.)

Base

Base offers a secure way to manage legal client relationships and cases. You can access

it from anywhere, share information and extract historical information into analytics reports that will help you continually improve the profitability of your law firm. Use it for business development, following up on leads, staying in touch with clients, and sharing information and tasks within your firm. Base integrates with Outlook, Google, LinkedIn and MailChimp, making email marketing campaigns a cinch.

System Features Include:

- Lead Tracking
- Sales Management
- Customer Management
- Mobile Sales Management
- Task Management
- Email Automation
- Plugins & Integrations
- Sales Reporting & Analytics

Why it may work for you: very intuitive; robust sales analytics; email integration; excellent customer service.

Law Ruler

Law Ruler is a legal CRM system that solves the problem of converting leads to signed clients and automates much of the intake process for firms. Law Ruler is unique in that it combines five different apps: CRM/contact management, text message marketing, email marketing, referral management and phone call tracking. A stand-alone CRM system, Law Ruler integrates with Needles or Clio legal practice management systems to provide one comprehensive CRM and case/practice management program to meet all of your firm's needs.

System Features Include:

- Contact Management
- Email Newsletter and Drip Marketing
- Integration with MailChimp
- Phone/Call Tracking
- Referral Management
- Calendar and Task Management
- Dashboard Analytics
- Integration with many practice management programs, including Clio and Needles

Why it may work for you: automated email and texting system; easy to learn and use; cost-effective; great customer service.

Lexicata

Lexicata is designed exclusively for law firms and focuses only on CRM, including lead management, client intake and client retention. Lexicata's goal is to help you track your client from the moment you meet them to the moment you formally retain them. If your

practice is lead-generation–heavy and you need to track a lot of leads from first contact to signing, Lexicata will streamline that process.

System Features Include:

- Contact and Lead Management
- Task Management
- Form Builder
- Analytics
- Notes & Tasks
- Email Templates and Syncing
- Client Intake Tools
- Integration with Clio, WordPress, MailChimp and a variety of other email programs.

Why it may work for you: If you already are using Clio, combining Lexicata to create a comprehensive lead management/case management system is a no brainer.

OnSite CRM

Comprehensive in its slate of features, OnSite CRM saves your law firm time and money by providing an integrated application that tracks clients, court dates, contact requests, filing dates and more. With OnSite CRM, you can move beyond simple customer relationship management to integrating all the forms, calendars and other data you need to grow your firm's business and track important dates, including filing deadlines.

System Features Include:

- Campaign Dashboard
- Email and SMS Marketing
- Social Media
- Lead Management
- Billing/Invoicing
- Document and Case Management
- Detailed Analytics and Reporting
- Responsive Design
- API and integrations with a variety of platforms, including Quickbooks, MailChimp, Google and more

Why it may work for you: appears to provide a more comprehensive system that includes both a customer relationship system and case/practice management features.

Before you invest in a CRM system, take advantage of the free trial periods most of these providers offer – better to spend time upfront trying out different systems than to settle on something blindly. You might also want to create an informal focus group of attorneys and staff to be the guinea pigs who test the CRM. That way, you can solicit feedback to better determine whether the solution is right for your firm.

If you have questions or comments regarding CRM systems, I'd love to hear from you. Email me, Jennifer Faivre, at jfaivre@jaffepr.com.