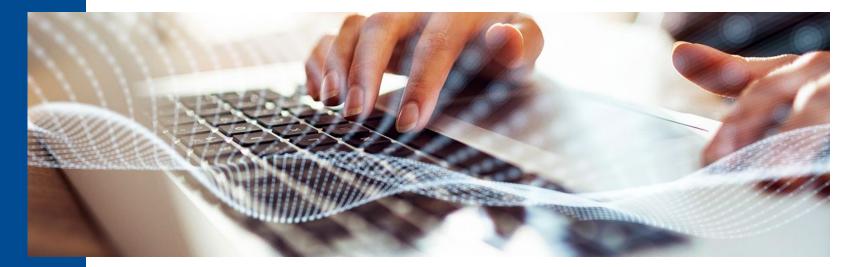
From Surviving to Thriving Growth Levers for Law Firms







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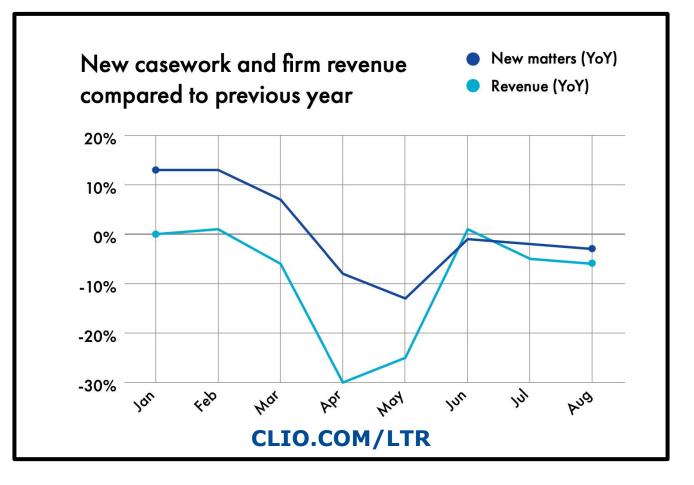
LAWCLERK



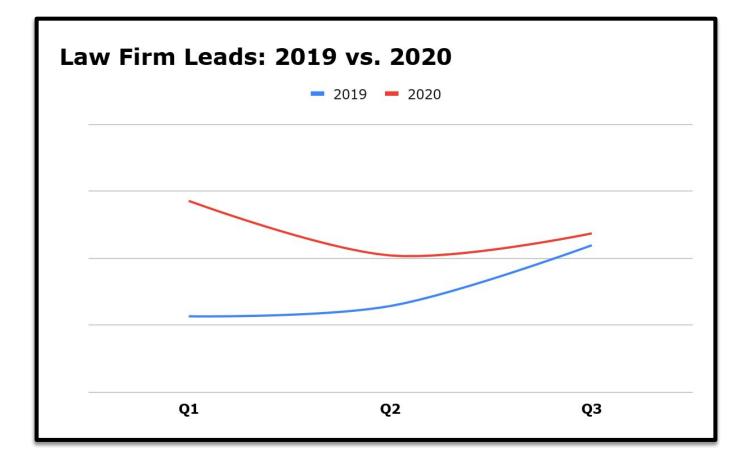
Key 2021 Marketing Trends and the Tactics to Help You Thrive













AVERAGE LAW FIRM*

Q1 2020: Revenues <u>UP</u> 10% vs 2019 Q2 2020: Revenues <u>DROP</u> 8% vs. 2019 (New Matters Drop 30%)

^{*}from Clio Legal Trends Report 2020

LAW FIRMS INVESTING IN MARKETING^{*}

Q1 2020: Leads <u>UP</u> 55% vs. 2019 Q2 2020: Leads <u>DROP</u> 20% vs. Q1 Q2 2020: Leads <u>UP</u> 23% vs 2019

*GNGF Data: Law Firms minimum spend of \$12,000/year on Marketing



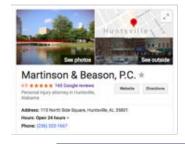
Marketing Trend #1:

The way people find your Law Firm has become more fragmented











4.9 **** 165 Google reviews

Personal injury attorney in Huntsville, Alabama





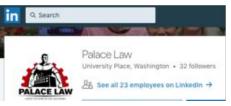




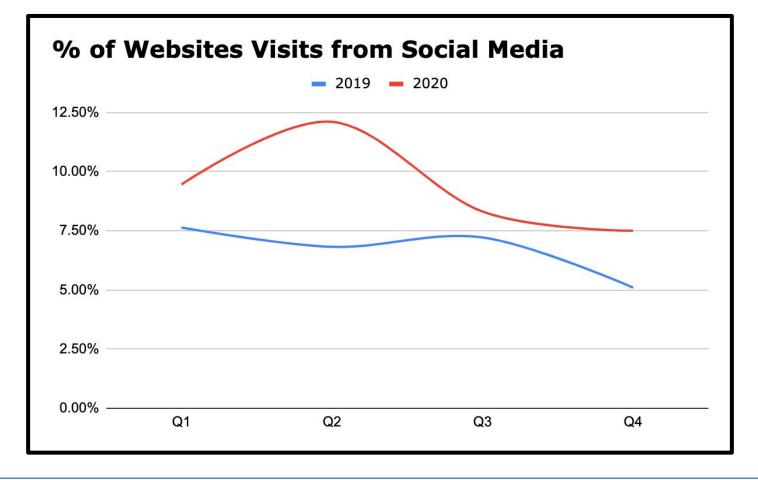














Your Marketing Strategy should be Multi-Channel

Build a Content strategy that incorporates at least 3 channels

Tactics:

- Website Content
- Email Newsletters
- Social Media Posting
- Video and Commercials on YouTube
- Google Paid Ads and Social Media Ads
- Google My Business
- Webinars
- TikTok?





Marketing Trend #2:

Consumers Expect Digital Service Options



"Reimagining marketing in the next normal"



- Teladoc Health...reached 1.7 million people in the US in Q1 2020, twice as high as in Q3 2019...
- ...we have vaulted five years forward in consumer and business digital adoption in a matter of around eight weeks.
- Fully 75 percent of people using digital channels for the first time indicate that they will continue to use them when things return to "normal."



CMO Survey

up to 1-2 years.

- Deloitte. DUKE FUQUA
- "increased value placed on digital experiences" is expected to "never return" to pre-pandemic days... this is viewed as a permanent change.
- 25.3% of B2C Services generated from internet based sales respectively.

The "return to normalcy" is not expected to occur for

• Small companies are also selling/servicing more online, with companies under 500 employees selling 26.1% over the Internet (more than larger companies)



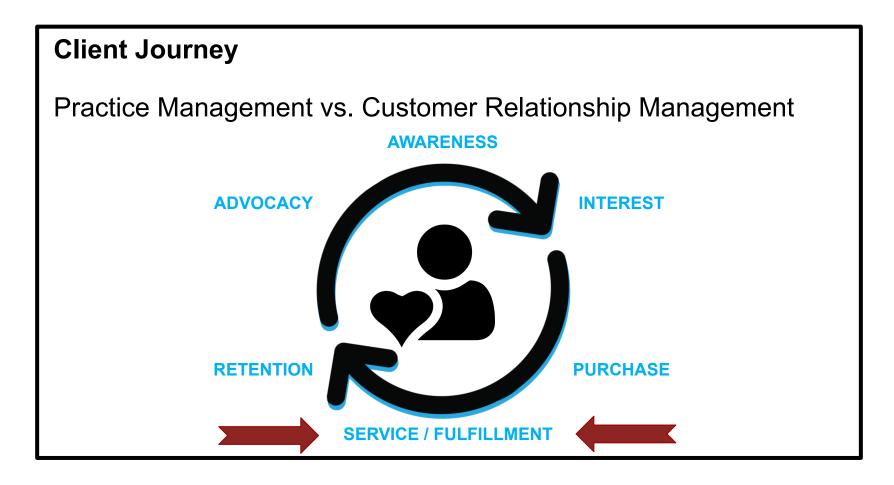
Highlight Your Customer Experience Improvements

Did you accelerate your operations to meet consumer needs? Include this in your brand message

- Ease of Online Consultations / Meetings
- Payment Plans, Credit Cards
- Productized Services, Flat Fee, Subscriptions
- Faster Turnaround
- Client portals, shared documents





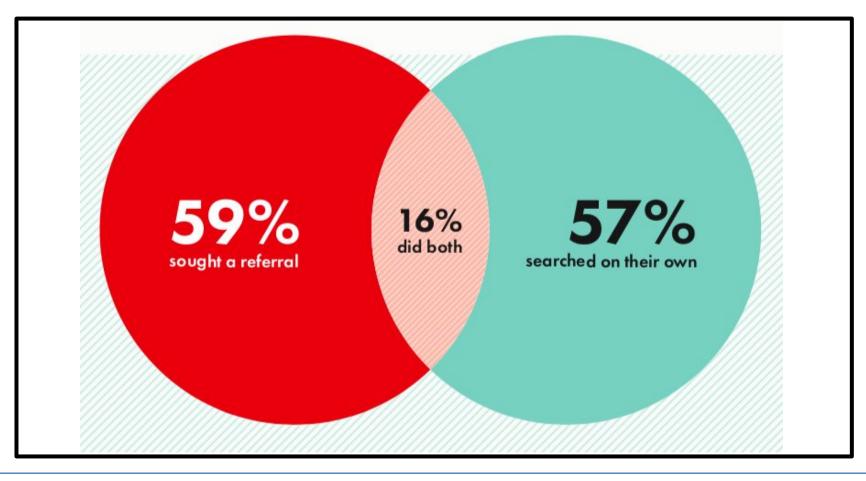




Marketing Trend #3:

Google is Now a Referral Partner







Use Digital Tools to Enhance Referrals

- Digital assets for referral partners: checklists, e-books, webinars
- Create email newsletters targeted to your referral partners
- Optimize your Google My Business Profile
- Get Reviews twice the competition



• Google is a referral partner: Search Engine Optimization a must

Search







Complimentary Book

PDF eBook version of our best-selling book sent to your email

GNGF.COM/THRIVE







Reaping the Rewards of Responsiveness in a 24/7 World

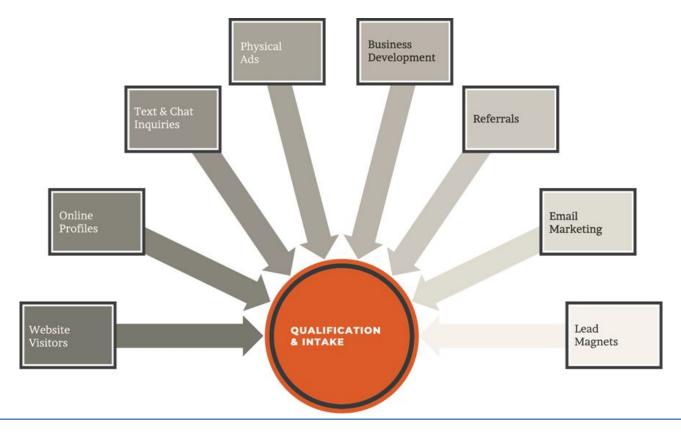
Let's Talk "Omnichannel" Communications

Responsiveness is a function not only of speed, but also of channel. Switching channels creates friction, and friction causes lost leads. Respond in-channel, instantly, to optimize conversions and client experience. Call answering is critical, but increased screen time now demands businesses to respond via text-based communications like chats, texts, and social messages.





Answering: From Every Angle



Meeting Consumer Expectations

Consumers are impatient

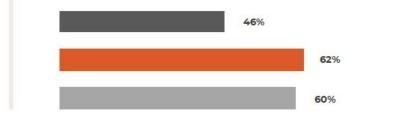
Speed is everything to today's buyers, and patience wears out at 10 minutes.

82%

of consumers rate an "immediate" response as important or very important when they have a marketing or sales question.

90%

of consumers rate an "immediate" response as important or very important when they have a customer service question. Percentage of consumers who define "immediate" as 10 minutes or less, by their stage in the customer journey.



Base: 1,000 consumers in the US, UK, Australia and Singapore Source: HubSpot Research Consumer Customer Support Survey, Q2 2018

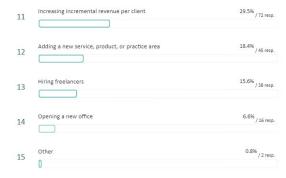
HUBSPOT RESEARCH

State of Small Service Businesses - 2021

Looking forward to 2021, what areas of your business are you most focused on improving?

244 out of 244 answered





Overall, how are you feeling your business will perform in 2021 compared to 2020?

244 out of 244 answered

I'll strongly outperform 2020	48.0% / 117 resp.
I'll moderately outperform 2020	40.2% / 98 resp.
It'll be about the same as 2020	11.1% / 27 resp.
l expect 2021 performance to be worse than 2020	0.8% / 2 resp.

Consumer Buying Statistics Affecting Law Firms



82% of consumers expect an immediate response when inquiring about services



67% of law firm clients say their "decision to hire" is most influenced by an attorney's initial responsiveness to their first contact



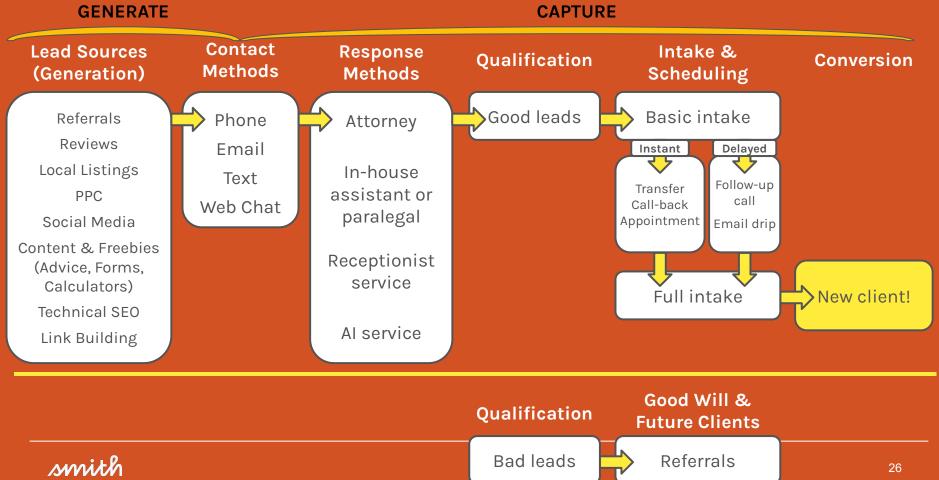
64% of legal consumers look for an attorney who offers a free initial consult



59% of PNCs did not hire an attorney after the consult

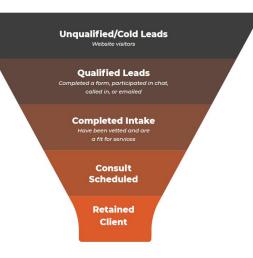


LEAD CONVERSION FLOW



Leads come in, but who's responding to them?

Know your gains and losses at every stage to begin optimizing.



CONVERSION METRICS	COST AND REVENUE	MARKETING COA & ROI
1,000 Visitors	\$5,000	\$5.00 Visitor
80 Leads		\$62.50 Lead
40 Qualified Opportunities		\$125.00 Opportunity
20 Consultations		\$250.00 Consultation
10 Retained Clients	\$20,000	\$500.00 Client



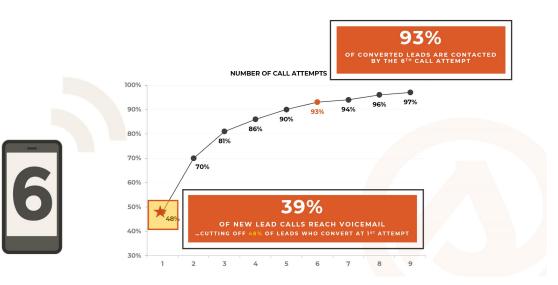
Inconsistencies are solved by better systems & service that leverage outsourcing and automation

OUTSOURCING FITS MID-FUNNEL...



Phone Systems & Services: Low-Hanging Fruit

- Mobility & Accessibility In-the-loop w/o interruptions
- Menus & routing
 - \circ $\;$ Leads vs. clients vs. court staff
 - Prioritization & delegation
- Don't neglect "outbound" responsiveness
- Blasts & sequences
- Overflow call handling
- After-hours handling
- Blocking spam & sales calls
- Services:
 - IVR vs. answering vs. receptionists
 - Messages vs. workflows
 - **Cost:** considering net value, not just upfront expenditure



Phone Precautions

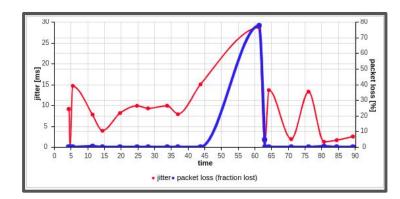
Potential Issues & Common Complaints

• Phone systems

- Ring delays (latency, mainly)
- No real-time support (Google Voice forums)
- No tracking or analytics (How will you track marketing ROI? Answers: CallRail, Google Tags, ASK!)

Answering Services & Receptionists

- Limited impact (answer/transfer/message vs. workflows & integrations — consider impact on time-to-conversion & opportunity cost of key staff's time)
- Adherence to directions
- Language gaps (no Spanish speakers)
- Single-channel vs. multi-channel coverage for chat, text, Facebook



MORE: Read Smith.ai guest blog post "<u>How to Get Crystal-Clear VoIP</u>" by Graham Nelson-Zutter, Cofounder & CTO of <u>Corvum.io</u>, a Clio-integrated VoIP provider dedicated to legal professionals.

After the "Answer:" Basic Intake (Capture-to-Help Model)

Standard intake form : Cooper Law, LLC online intake form

Get started with Cooper Law by submitting an online yourself for a consultation.	Home Who We Are What We Do Where We Work N	Vews Contact 1	
Cooper Law Online Intake Form			
	oking for family law representation or social security disability representation. After you fill out and submit o determine if your legal matter is a good fit for Cooper Law, LLC.	the form, you can	
Name *		Phone *	
			Lead selects:
First Address	Last	Email	
Address			- Practice area
Street Address Address Line 2		How did you hear about Cooper Law, LLC? *	- Whether a
City	State / Province / Region	What is your legal issue? *	court hearing is scheduled
		Social Security Disability	Scheddled
po (ter form completion, tential client is given option to book free -minute consultation.	 Other Is there a court hearing scheduled in your case? * Yes No I don't know 	*These are <u>required</u> fields.

After the "Answer:" Help-First Model (then Capture)

Alternative forms that double as basic intake forms:

- Traffic ticket estimate request form vs. standard traffic ticket intake
- Eviction notice (see below)

Use this form to create an eviction notice. After you click the button on the bottom, you'll be able to review your entry. After that, click Create My	Tenant One *	Is this a multi-unit property? * You must include a unit/floor number if they rent out a portion of the property.	
Notice!, and a notice will be generated and sent to you within seconds! Check your email.	First Last	Yes 🔻	Landlord receives
Step 1 of 2 - Prepare Your Notice	Tenant Two	Unit / Floor Number *	completed eviction
	First Last		notice via email
Notice Type	Tenant Three	County	
5 Day 🔻		Cook 🔻	with submission
Landlord Info	First Last	Notice Information	instructions
Please enter all information with proper capitalization.	Tenant Four	Rent Per Month *	
Landlord Name *			Louis firms to postifical
Please list the property owner's name, business entity, or	First Last	Total Rent Owed *	Law firm is notified
management company	Tenant Five	No late fees or penalties	of new lead
Contact Name *	First Last	Last Time Tenant Paid Rent or Full Rent *	
If a business entity or management company, please enter a point of contact	Tenant Address *		Reminder is
	You must include all parts of the address. If there's a unit	Signature *	scheduled for
	number, it MUST be listed or the day notice is invalid and can enter that on the next section.	DO NOT SERVE AN UNSIGNED EVICTION NOTICE!	
Email *	STREET ADDRESS ONLY. NO UNIT NUMBER. TI		follow-up based on
	STREET Address only. No unit number		"notice type"
Phone *	Illinois	▼	
	City		timing, e.g., 5 days
Address *	State	0	
Enter a location	ZIP Code	Next	

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Tip: Require agreement to website terms & conditions upon form completion, so emails (e.g., lead nurturing campaigns) can be sent as follow-up communications to increase lead-to-client conversion. Agreement to terms = permission to email.

Smart Calendaring Solutions: Book Leads & Much More

- Integration for web, email, workflows
- Reduce scheduling back-and-forth
 - ▷ 2 people: Clio, Calendly
 - ▷ 3+ people: Doodle
- Outsourcing & automation
- Precaution: Don't block time using deadlines

Wisestamp



Doodle

	Mar 4 MON 10:00 AM 11:00 AM	Mar 4 MON 11:00 AM 12:00 PM	Mar 7 THU 10:00 AM 11:00 AM	Mar 7 THU 11:00 AM 12:00 PM
5 participants +	✓0	✓1	✓5	✔3
e Steve			~	
Estelle			~	× .
e Mike			~	~
🕒 Val			~	
🌍 Maddy Martin 🧪		~	~	~

Calendly

Webinar prep							
Bryan Marble (c	lientsherpa.com)					
Webinar prep							
Hi Bryan,							
Let's review our webinar game plan!							
Please select the	e time that works b	pest for you.					
Event: 30-Minute Phone Call Time zone: Pacific Time - US & Canada Change							
WED	THU	FRI					
Feb 13	Feb 14	Feb 15					
1:30pm	12:30pm	<u>6:00am</u>					
2:00pm		<u>6:30am</u>					
		9:00am					
Need another time? See full list of times							
Powered by <u>Calendly</u> Thanks! Maddy - Maddy Martin Head of Growth & Education Smith.al 650.603.6173							
				Send	<u>A</u> () GO	😀 🛆 🗖 Ş	

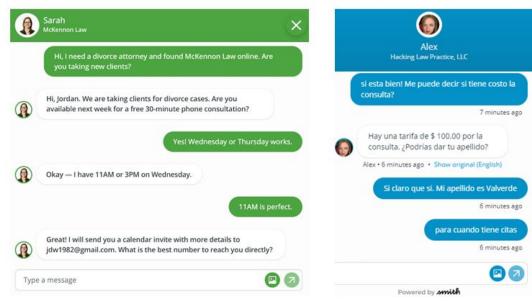
The Move to Chat. Exposing What You've Been Missing Chat lets you get in front of the call (or even eliminate it)

MORE CLIENTS, MORE PRIVACY FEWER INTERRUPTIONS



Professional services firms that use website chat see a 20-30% increase in lead conversion. Expect 1 net-new chat lead for every 4 calls

LEAD QUALIFICATION



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REAL-TIME

ENGLISH-SPANISH

TRANSLATION

The Difference Between Live Chat and Chat Bots



A **Chat Bot** is an automated service that lives on your website. Powered by artificial intelligence, it can offer simple answers to common questions that have been programmed into the system, such as the location of the office, practice areas of the firm, process for setting up a consultation, and more.

Chat bots get smarter over time thanks to interactive training with the firm's attorneys and staff.



Live Chat is when messages initiated by a website visitor are addressed by a live person who has the ability to answer questions, carry out complete workflows (such as lead qualification and consult scheduling), and help existing clients obtain information or connect with staff or an attorney. Live Chat can be staffed by in-house teams or remotely by third-party vendors.

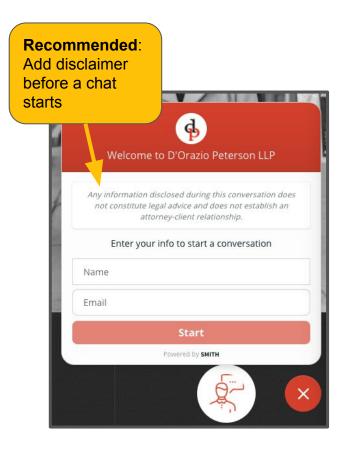


Hybrid Chat combines Live Chat and Chat Bots for the accuracy of an automated system with the sensitivity of a real person.



Chat Best Practices

- Proactive: Staff with live agents, and choose proactive, yet patient, engagement
- **Page-specific help**: Reduce cost, focus on top-converting pages
- Gatekeeping: Serve as "gatekeeper" to online calendar for consultations to reduce no-shows and cancellations
- Sentiment sells. Focus on sentiment first, goal second.
- Lead qualification & referrals: Identify leads with your custom criteria
 - Schedule consults & initiate call-backs with qualified leads
 - Refer out "bad" leads
- Chat-to-call: Instant transcripts and chat-to-call flow allow immediate, informed intake by remote or in-house staff



Sounds great? Wait! None of this works without identifying what makes a good lead. Document THEN delegate.

CREATE YOUR IDEAL INTAK	E FORM		
GOAL Standardize data collection to consistently	INSTRUCTIONS Within each section, add the information you need to collect to effectively and efficiently screen PNCs.	EXAMPLE Intake Form	
capture, qualify, and route PNCs.	effectively and efficiently screen rives.	FORM SECTION	FIELDS
		Contact details	Name, address, phone, email
FORM SECTION FIELDS		Case details	Date of accident, court date, marital status, names of other parties involved
Contact Details		Financial details	Annual income, employment status
Case Details			
Financial Details		Payment preference	Credit card, cash, check, ACH, payment plan
Payment Preference		Expected time to	Considering options, urgent, 2-3 months,
Expected Time to Close (Urgency)		close (urgency)	6 months, within 1 year
Case Value		Case value	\$
Source			
Other		Source	Google search, Facebook, individual, organization
		Other	Police report, damage photos, doctor, insurance

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Now, it's game time

- Identify 5-10 preliminary lead-qualification questions
 - Focus on "must have" qualities to filter leads: good vs. bad
- Build a basic, shareable intake form (publicly accessible link)
- Define qualification & intake processes, and consider how to handle each step:
 - Self (continue doing)
 - Streamline (cut/reduce/ease)
 - Automate (w/ software or app)
 - Outsource (w/ service)



Get in position to win

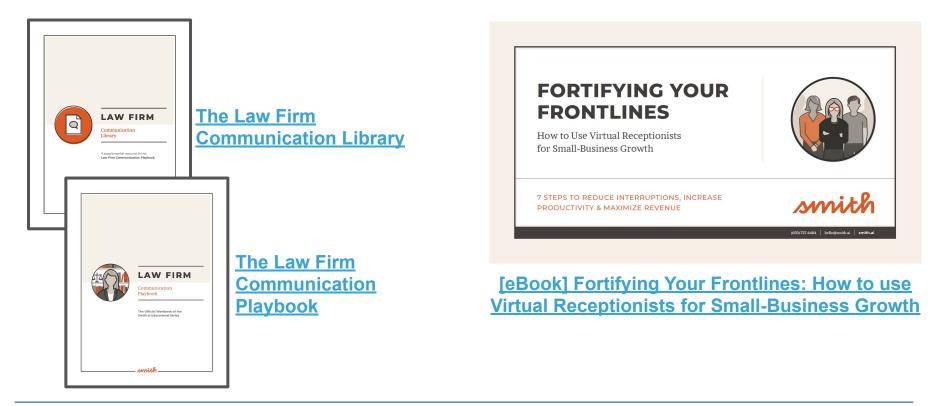
- Prioritize fixes by greatest time consumption, importance (lawyering) & urgency
 - Consider <u>Eisenhower Decision Matrix</u>
 - ⊳ Tips:
 - Qualification & payments are often most time consuming & most easily outsourced
 - **Data entry & lead follow-up** are most easily automated
- Implement new form & process in next 30-60 days, depending on scope, cost & difficulty.
- Wait 1-2 months to re-stabilize. Evaluate impact: savings, earnings, leads, clients, work/life balance, stress levels, sleep quality, etc.
- ► Re-evaluate process & improvement opportunities 1-4 times per year.

Far-reaching impacts on your firm





Free resources to help you identify & implement responsive practices



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Key to Thriving: Time Saving Legal Technology Solutions

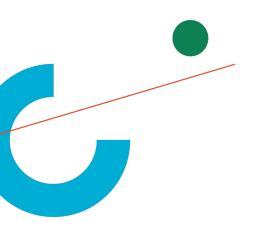






Our Data Inputs

All results are anonymized and aggregated



Clio's app data

Aggregated and anonymized data contributed from tens of thousands of legal professionals.

Surveys of US legal professionals

Multiple surveys with over 1,000 responses containing qualitative and quantitative results from practicing legal professionals.

Surveys of US general population consumers

Multiple surveys of over 1,000 responses from members of the general population.





Survey of US legal professionals.

- April 3 to 9: 485 respondents
- April 20 to 24: 654 respondents
- May 4 to 14: 609 respondents
- May 18 to 29: 783 respondents
- June 15 to 22: 566 respondents
- July 13 to 22: 635 respondents
- August 6 to 22: 1,044
 respondents

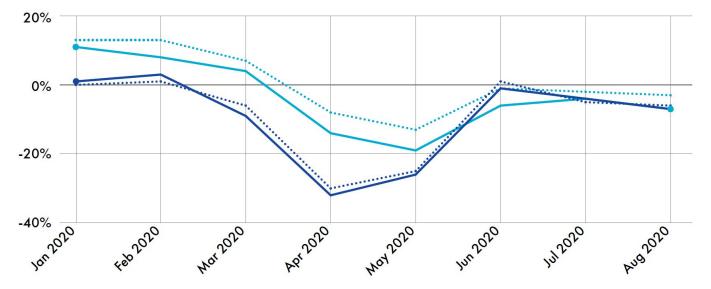
Survey of US general population consumers.

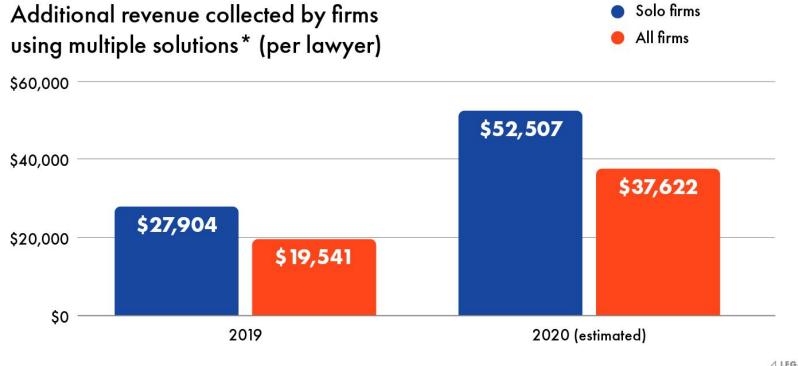
- April 14: 1,042 respondents
- May 4 and 5: 1,019 respondents
- May 18 and 19: 1,055 respondents
- June 16 to 18: 1,004 respondents
- July 13 to 14: 1,003 respondents
- August 4 to 7: 1,002 respondents

Impact: Casework and Revenue

New casework and firm revenue compared to previous year







*Electronic payments, client portals, and client intake and CRM



66%

are concerned about the success of their legal practice



are concerned about even making a living at all

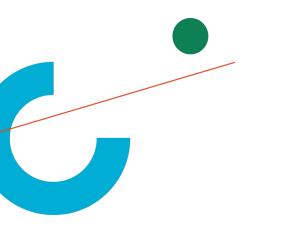




are concerned that their clients won't be able to pay them



There are tangible reasons for their concern. They've seen their businesses suffer.



From our Survey Data

60% of solos reported seeing a decrease in the number of clients reaching out to their firms.

24% had to forfeit revenue by June 2020.

15% of solo lawyers had to lay off staff by July of last year.

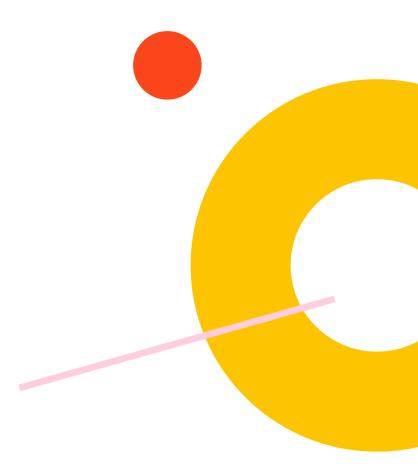


How have client expectation changed?





OF CONSUMERS SAID THAT TECHNOLOGY IS MORE IMPORTANT TO THEM NOW THAN IT WAS BEFORE THE CORONAVIRUS PANDEMIC.







OF CONSUMERS SAY THEY USE MORE TYPES OF TECHNOLOGY.



OF CONSUMERS SAY THEY'RE MORE COMFORTABLE WITH TECHNOLOGY.



56%

of consumers would prefer videoconferencing with a lawyer over a phone call.



of consumers prefer paying for legal services electronically.





of consumers prefer working with a lawyer who can share documents electronically.



Despite the benefits of adopting technology, solos are slower than other practitioners at adopting.



Technology adoption among law firms

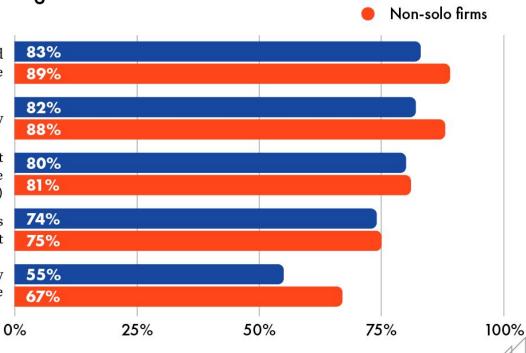
Using software (rather than paper-based systems) to organize their practice

Meeting clients virtually

Saving information, documents, client files, and other firm information to the cloud (rather than a local hard drive)

> Allowing clients to pay invoices electronically by credit or debit

Offering clients the option to securely share and sign documents online



Solo firms



LEGAL TRENDS REPORT PUBLISHED BY CLIO Technology adoption in 3 key areas drove performance. 1. Client Intake and Legal CRM

2. Online Payments

3. Client Portals



Another look

Additional revenue collected by firms using multiple solutions* (per lawyer)





*Electronic payments, client portals, and client intake and CRM

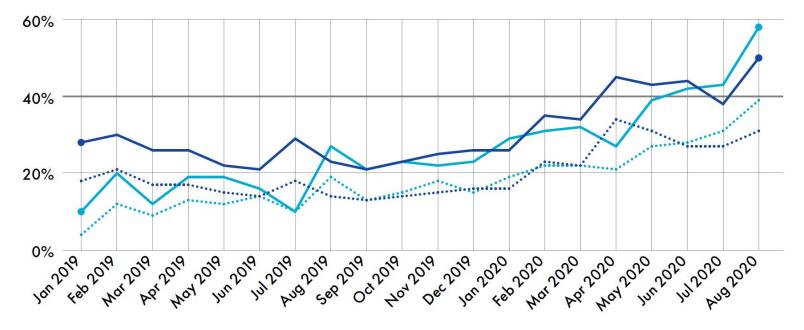


Advantages to using multiple solutions

••••• % difference in total matter volume (all firms)

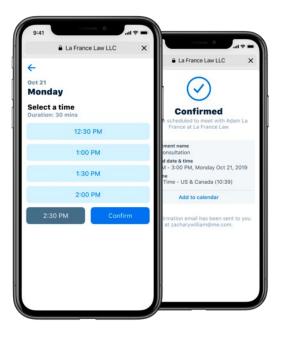
- % difference in total matter volume (solo firms)

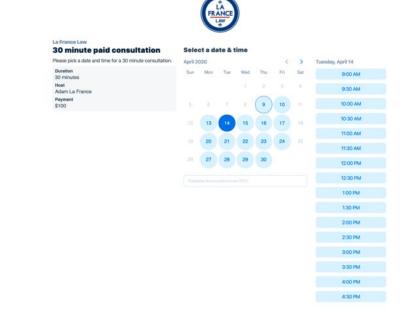
% difference in total revenue (all firms)
% difference in total revenue (solo firms)



Improving Acquisition

Improving acquisition: Scheduler + automated follow-ups

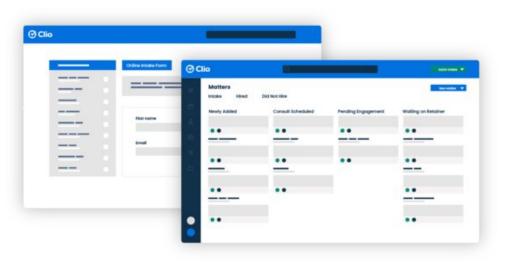






Streamlining Intake With Clio Grow

- Make the client intake process more efficient—and personal
- Automate tasks, so you can focus on what matters most
- Know which matters and clients drive your success





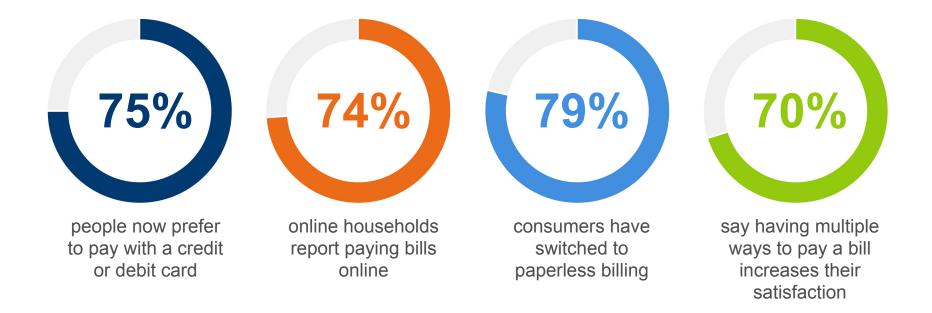


Give the People What they Want: Thriving with Online Payment Technology

If billing and collections are the lifeblood of your practice, you need to do everything you can to reduce friction and increase predictable, reliable, and on-time payments in your practice.



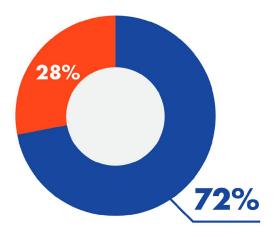
Today, your clients want payment options



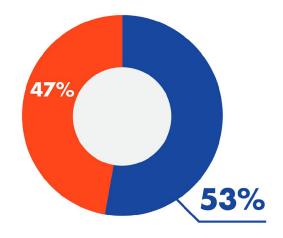


Electronic payments

72% of consumers would prefer to pay their legal fees via payment plan



53% of law firms are equipped to offer payment plans









Online payments lets you...

- Improve communication
- ✔ Offer a 24-hour virtual service
- Put the ability to pay right in your clients' hands
- Provide instant payment confirmation
- Appeal to younger, tech-savvy clients



Client Name	Matter Number
Roy Smith	1304
Card Number	CVV
**** **** **** 9993	001
Exp.	
NOV	2021
VISA 🌔 🔣	De POWERED BY LAWPAY
eCheck DISCOVER	Pay Attorney



• • •

Improving your processes: billing and collections



Billing and collections

- Use credit cards/online payments to your advantage
- Get paid the same day (or hour) an invoice is sent out
- Send clients payment links for exact amounts
- Set clients up on a payment plan with authorization forms



#ProTip on authorization forms

Have your fee agreement echo your credit card authorization forms

	ATTORNEY FEE CONTRACT
FATE OF	TEXAS §
OUNTY C	FHARRIS 8
	P.W. Smart
	Client Credit Card Authorization Form
	In an effort to better serve our clients and simplify your billing experience, our firm offers online payments for your convenience.
CHARGE POLICY	ONE/FIRST TIME PAYNENT: I hereby suthorize to charge the balance currently due for the amount of \$ to charge the balance due each month. FUTURE PAYMENTS: to charge the balance due each month. Phil hereby suthorize to charge the balance due each month. Phil hereby suthorize to charge the balance due each month. POLICES: Poynent is considered late after the of the month. Any balance will be charged to the card on file.
torne HO thoris thoris tient i	Benuel Payment made for services delivered by this firm are non-vefundable. In the case of retained services, any unused funds will be refunded to the card on file within deps Benuel The case of retained services, any unused funds will be refunded to the card on file within deps Benuel The case of retained services, any unused funds will be refunded to the card on file within deps Benuel The case of retained services, any unused funds will be refunded to the card on file within deps Benuel Benuel Services are refunded to the card on game to the services provided. Further agree that in the event my credit card becomes invalid, in will provide a new valid credit card unor request, to be charged for the payment of any outstanding balances oved
	Cardholder Name:
ATION	Cardholder Rilling Address:
INFORM	Type of Card: VISA DISCOVER AMERICAN Card Number:
1 3 9 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	* Per PCI Compliance guidelines, the test 6 digits may be recorded for verification purposes Expiration Date:
	Cardholder Signature: Date:
	First Name: Last Name:



Tips for getting money in the door

- Don't be shy
- Be practical and organized
- Bill clients regularly, predictably, and close to payday
- Follow up on unpaid invoices EARLY and REGULARLY
 - Have the attorney working on the case be the one to reach out
 - Give people an immediate and frictionless way to pay
 - Consider offering discounts for immediate payment remittance



Online payments in the age of COVID-19



Stories from the front line





LAWCLERK

Thriving with Improved Law Firm Business Models

Now is our Chance to Do Law Better



CLIENTS WANT CERTAINTY

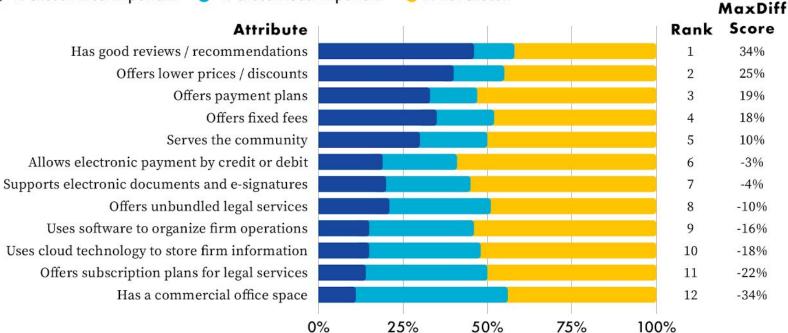


MaxDiff analysis on what makes a lawyer hireable according to consumers

% chosen most important

% chosen least important

😑 % not chosen



Clients Want Non-Hourly Billing

Flat Fees

Unbundled Services

Minimum Fees

Subscription Plans

Managing Growth



Modern Staffing



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Why outsourcing makes sense



Grow your firm

Minimize stress

Make more money

Access expertise ... and more!

On Demand Access to Top Talent









County prosecutor by day Has her own solo practice in Texas Retired Harvard law grad who loves to write Former RN, now <u>full time</u> freelance lawyer

On Demand Access to Top Talent









Works at UN High Commission for Refugees 9th Circuit extern, now bankruptcy freelancer

Associate GC at large bank with JD/MBA Stay at home mom with 10+ years experience

LAWCLERK A BETTER **BUSINESS MODEL** FOR ATTORNEYS

LET'S DO THE MATH ...

- Flat fee project to freelancer: \$1,000
- Hours worked 8.5
- Reasonable market rate: \$200
- 8.5 x \$200 = \$1,700 billed to client
- Profit = \$700



LAWCLERK

Bring more profits to your firm each and every month with LAWCLERK'S VIRTUAL ASSOCIATE SUBSCRIPTION PROGRAM.

HIRE A VIRTUAL ASSOCIATE FOR 40 HOURS A MONTH

Pay the Virtual Associate \$100/hour

Monthly total = \$4,000

YOU CAN BILL THE VIRTUAL ASSOCIATE'S TIME

TO YOUR CLIENT AT REASONABLE MARKET RATE FOR YOUR PRACTICE AREA AND JURISDICTION.

> Reasonable market rate - \$275

40 x \$275 = \$11,000

INCREASED MONTHLY PROFIT

\$7,000

Over the course of the year drive an additional \$84,000 profit to your firm with no added overhead!

If you've been dreaming of a freelance career





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Questions?

Thank you for attending!







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