PRIVILEGED
MEMBER ATTORNEY
INFORMATION

Best Practices for LegalMatch Member Attorney Success

Our most successful Member Attorneys use all the tools we provide within the LegalMatch service to increase their engagements, revenue and overall clientele base. These suggestions are modeled off our most successful accounts across the US.

Always have a positive and helpful attitude and tone.

Respond to all cases within 10 minutes of the case posting, followed by an immediate phone call to the client

- Set up templates ahead of time for each of your favorite types of client engagements, so you are able to respond to those cases as quickly as possible.
- Send your template response, followed by an immediate call.
- If you call within 3 minutes, your chance of getting an engagement will be 33% higher than calling within 12 minutes.
- Potential clients will not likely call you; they are waiting for your call.
- Think of this as an opportunity to earn an individual's legal business.
- While an individual may choose another attorney, do your best to speak to that potential client first before h/she makes a decision on who to hire.
- Clients often hire the first attorney they speak with.

Respond to all cases

- Do not analyze the case information until you have spoken with the client. This is important.
- Respond to ALL cases. You can qualify the client once you get them on the phone. Responding to all cases also opens the door for referrals even though you may not be able to help the client who originally posted the case. Networking is the number one way to gain clients.

Offer a free consultation

- Offering a free consultation allows both you and the client to meet, discuss the case, and determine if it will be a good fit
- Legal clients typically expect the first initial consultation conversation where both the client and attorney are getting a sense of each other and the case to be more of a free sales call.

Use LegalMatch's Calendar Feature

- 70% of clients select appointment times for an initial consultation through the Calendar feature after they submit their case. Confirm a time they've suggested or propose a new time using that same feature after you send your response. Cases with confirmed appointment times get double the engagement rate as cases without a confirmed appointment time.

Respond, Consult, Retain

- Meet with the client in-person, consult over the phone or set-up a teleconference.
- Step One: The client discusses the case.
- Step Two: The attorney asks questions and determines if the case is a good fit
- Step Three: If the attorney decides it's a good fit, the attorney should qualify, meaning they describe past case history, number of years in practice, past outcomes, etc. The attorney does not give any legal advice or direction to the client.
- Step Four: The attorney provides the client with the retainer agreement, and closes the client by prompting with statements such as 'when we can get started' For closing statements and ideas, visit https://blog.hubspot.com/sales/closing-phrases-seal-sales-deal.
- Step Five: If the client wishes to think about it for a few days, follow up several times by calling the client to express your interest in helping them (again, sending an email does not work).

Call back and listen

- Most clients have to think about their options and talk to others (usually a spouse or family member) before they agree to retain an attorney.
- If possible, encourage multiple phone calls and meetings because *it's important never to rush or pressure individuals into retaining your services.* If you allow multiple conversations to take place before they sign, it affords potential clients the opportunity to learn more about you and what you offer before starting the attorney-client relationship.
- *Giving individuals the time to emote or vent pays off later because they know you will listen to them as their attorney and they know you care about their circumstances. Potential clients want to know you care more about them and their plight than you do in the retainer and whether they can pay it.* While this approach takes time, it is beneficial in attracting potential customers.

Call, text, and email every client for three days

- Day One: Call, Text and Email (email from your company account, not the LegalMatch system)
- Day Two: Call, Text and Email
- Day Three: Call, Text and Email
- If they have not hired an attorney, let them know that (ATTORNEY NAME) can help them. The message should say that if you don't hear from them within 48 hours, you will be closing their case. Then archive the case if you don't hear from them.
- Sending a template response without a follow-up call does not work.

To text, we recommend a combination of Google Voice (free with a Gmail account - google mail) and Textblaze, an online macro.

Understand the demographics of your area and if needed, adopt a flexible billing schedule

- To view income, population and income levels in your county, please visit https://datausa.io.
- Adopt the philosophy of "What good are legal rights if individuals cannot afford to use them?"
- Understand the economic situation of the client. You will attract more clients if you are willing to work with them on fees.
- Offer online payments, payment plans and flexible retainers.
- LegalMatch sources cases from clients in your local area. LegalMatch does not screen the cases and cannot control the demographics or socio-economics of the people who need legal help in your local area.

Profiles should be short, sweet and direct

- Only state pertinent facts of who you are professionally and what credentials and experience you have. Two or three paragraphs is the most effective.
- The profile picture should be a professional headshot. This is your first impression with clients.
- Your profile should convey the unique characteristics that you offer. What do you do that's different from all of the other attorneys out there?

Customize the Response Templates

- Personalizing each response will only slow down your response time. The first attorney to respond usually gets the case unless #2 has a better sales pitch.
- Customize the response with a few "one-liners" and a few open-ended questions before you send a response.

Use the LegalMatch Attorney Mobile App

- Download (iOS or Android) and start using the mobile app, if you haven't already.
- Logging into your account using the Attorney mobile app will let you view new cases and reply to clients anytime, anywhere.
- Attorneys using the Mobile App are able to respond to cases 3x faster than attorneys who don't. That speed tends to result in double the engagements.
- You will get notified every time a new case is posted in your practice area. You can't be in front of your computer 24/7. If you will be notified right away as soon as a new case is posted, it is very convenient to view it from your phone or mobile device.