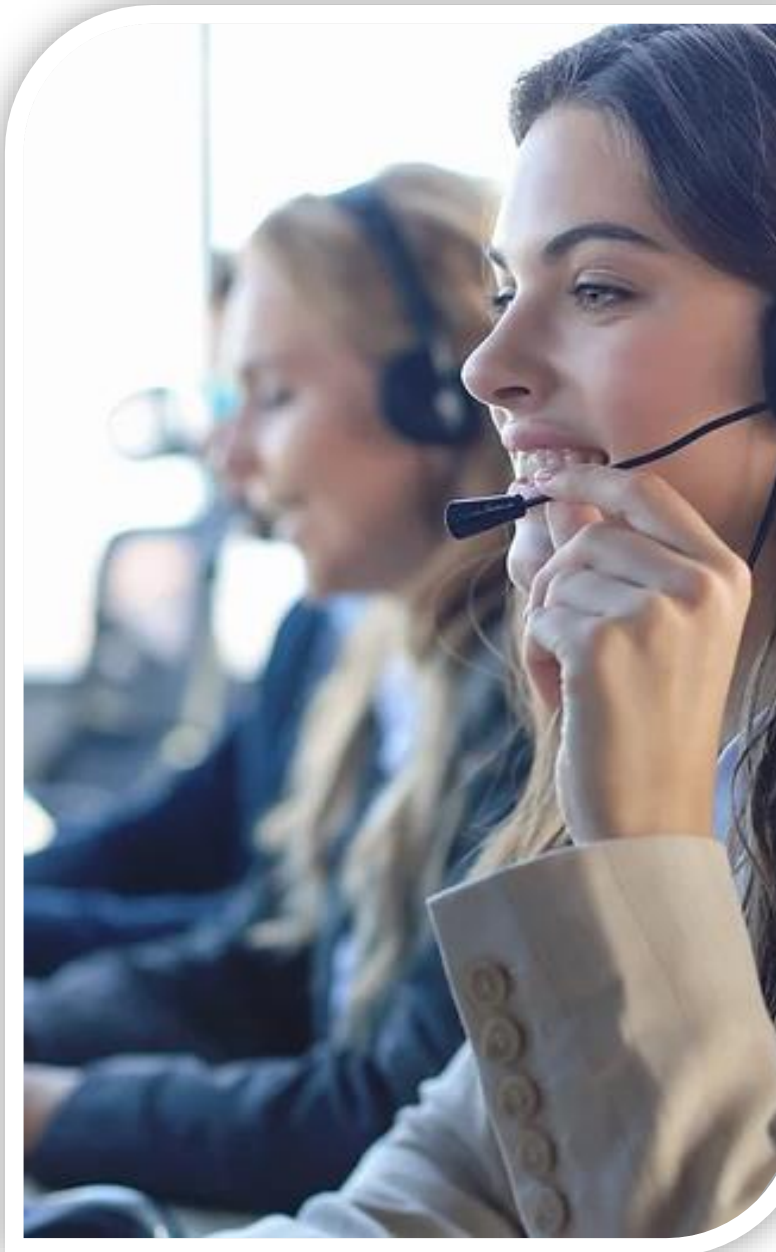
Common Pitfalls in Intake
Departments

The Failure to Follow Up on Wanted Leads

Your intake team should be following up with potential clients at least 3 times per day until you make an appointment or get the signature on the retainer agreement. Staying after those leads and demonstrating to them from the very beginning that your firm cares, will set you apart. Competition is fierce, and your follow up strategy should account for that. Be persistent.



Lack of Training and Salesmanship

Intake team members should be well versed on how to persuade and convince those leads who are having a hard time deciding to sign up with your firm. You should provide formal training, scripts, and manuals for Intake Specialists, so they know how to relate to potential, indecisive clients and assure them they have called the right law firm. Be persuasive.

Missing Intake Calls After Hours

A call service cannot sell your firm the way your intake team can. Consider allowing longer hours or creating different shifts for your Intake Department. Review your after-hours call service reports. See if after-hours calls are coming in during key time slots (like drive-to-work and drive-home times). Fielding those calls could increase your conversion rate significantly. Be flexible.

Not Selecting Right Fit Team Members

When you recruit for your Intake Department, look for people who have a sincere passion to help others, are humble, possess empathy, and are stellar communicators. Finding candidates with these skills is not easy but settling for anyone else usually represents the key difference between a successful Intake Department and a struggling one. Be picky.

vista
THE BUSINESS RESOURCE FOR PLAINTIFF LAW FIRMS

www.vistactschools.com

Sept 2020