ARE YOU LAWYERING OR LABORING?

7 Steps to Reduce Interruptions & Chores and Run a Highly Productive Law Firm with Virtual Receptionists

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CONTENTS

INTRODUCTION

Since 2015, Smith.ai has provided superior virtual receptionist services to solo and small-firm attorneys. After handling over 500,000 calls, we know the communications and operations issues that prevent attorneys from running their ideal law practice, and how to fix them.

Here, we identify the seven most common dilemmas that attorneys face, and present the most effective and accessible solutions.

Our goal is to help you run a more productive, professional, and profitable law firm with virtual receptionists, so you can capture more leads, increase revenue, reduce costs, improve client satisfaction, and achieve work/life balance.

LEGAL TRENDS HURTING SOLO AND SMALL-FIRM ATTORNEYS

Findings from the
2017 Clio Legal Trends Report.

ARE YOU LAWYERING OR LABORING?

1.9 hours

The average time an attorney spends on billable work per day.

2.9 hours

The average time spent each day on admin tasks.

1.2 hours

Of those 2.9 hours, the top 3 tasks are office administration (16%), invoicing (15%), and configuring technology (11%).

2 hours

33% of the 6 hours a day not spent on billable work goes toward business development, indicating the importance of generating new clients.

23 minutes

How long it takes to recover from an interruption. Attorneys are interrupted about 6 times per day, so that's approximately a 2-hour loss per day.

2 out of **3**

Folks who say their "decision to hire" is most influenced by an attorney's responsiveness to their first call or email.
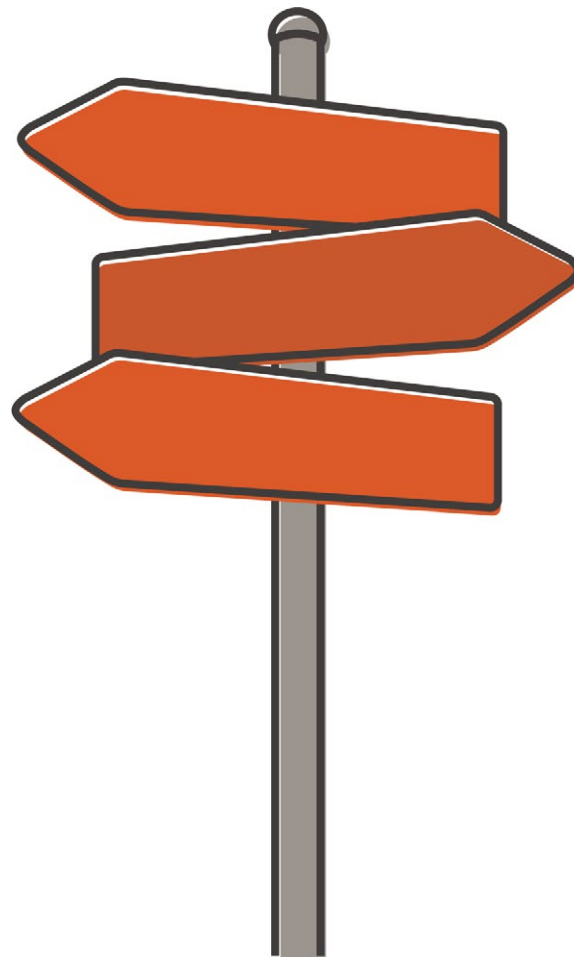
86%

The average amount of attorneys' earnings that is ever collected.

39%

How much faster law firms get paid when they accept credit cards.

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SEVEN DILEMMAS OF SOLO AND SMALL-FIRM ATTORNEYS

So, you're losing leads, earnings, and valuable time.

Why? Because you're faced with difficult (and understandable) trade-offs.

Here are the top seven.

❶ Business Growth vs. Productivity

→ Interruptions from calls, texts, and emails kill your productivity. You want to **minimize** interruptions.

→ Potential clients demand quick response times. You want to **maximize** responsiveness to new leads.

❷ Revenue vs. Non-Billable Time

→ Invoicing and chasing down late payments drain time that could be spent on billable work. You want to **minimize** time-consuming billing tasks.

→ You need (and deserve) to get paid. And not after a collections agency takes a 30-50% cut. You want to **maximize** revenue.

❸ Intelligent Technology vs. Technology Skills

→ Technology makes you more efficient. It's particularly important for solo and small-firm attorneys to automate tasks, processes, and data. You want to **minimize** routine tasks and administrative chores through software, apps, and AI-enhanced services.

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THE SEVEN DILEMMAS
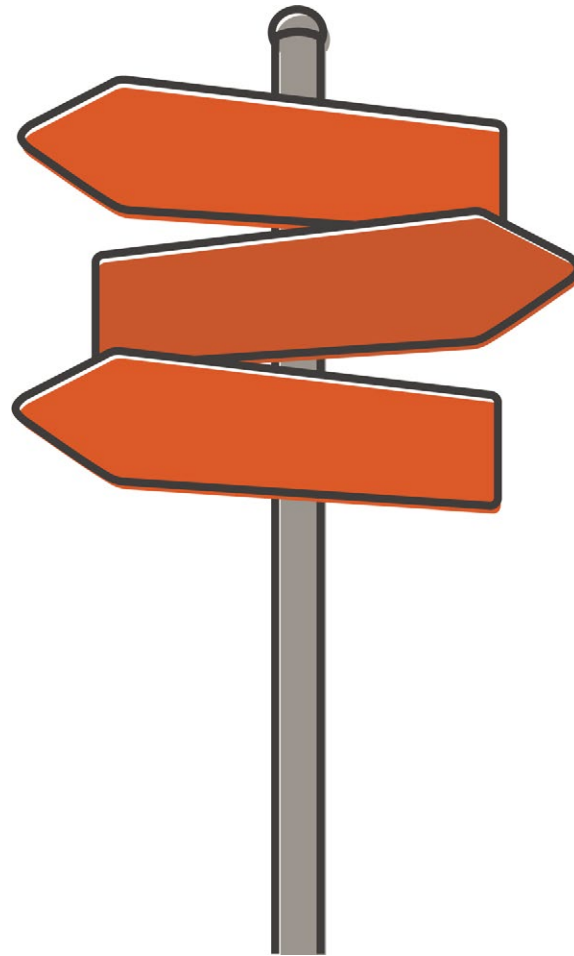
→ Few attorneys have advanced technical know-how. In a small practice, you have limited to zero IT support. You can't spend all day learning and configuring technology. You want to **maximize** your use of simple, intelligent tools that don't require a consultant to set up.

❹ Happy Clients vs. Satisfied Self

→ Clients need an attorney who is not only adept at legal matters, but also reliable and responsive. Less-responsive attorneys receive more bar complaints. More-responsive attorneys receive more more repeat business and referrals. You want to **maximize** responsiveness to clients.

→ Your time and your paralegal's time are best spent on legal work that only you can do — not intake, calendaring, and giving directions to the courthouse. Plus, attorneys who spend more time practicing the law report greater work satisfaction. You want to **minimize** time spent on non-confidential client tasks.

❺ Operational Control vs. Sustainable Growth

→ Having more control over your practice is one of the main reasons you chose to work in a solo or small practice. Control relates to your work methods, hours, practice areas, and more. You take pride in how you work, and your law firm is under your name. You want to **maximize** control over your practice and reputation.

→ Controlling everything is exhausting. You want work/life balance, or at least the option to delegate. There

will come a point when you can't do everything and do it well. You want to **minimize** your practice's total reliance on you.

❻ Lead Quality vs. Quantity in Digital Marketing

→ A well designed website, traffic-driving content, local SEO, and marketing automations are essential to drive new leads. You want to **maximize** your law firms' exposure online.

→ Online traffic is often poor quality, reflected by low lead-to-client conversion rates compared to referrals and other marketing channels that filter out undesirable clients. You want to **minimize** engagement with "bad" leads.

❼ Receptionist Skills vs. Cost and Flexibility

→ You recognize the need to enlist help. You need a receptionist who is smart, reliable, thorough, highly productive, professional, and who makes good decisions on your behalf. You want to **maximize** your receptionist's skills.

→ You run a lean and nimble law practice. In-house receptionists require a salary and benefits, and expect job security. What will your firm look like in a year? You want to **minimize** high fixed costs and commitments.

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SEVEN SOLUTIONS PROVIDED BY VIRTUAL RECEPTIONISTS

Here are the top seven ways virtual receptionists can solve those seven common issues plaguing solo and small law firms.
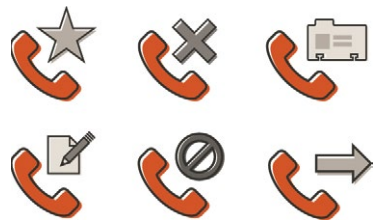
SOLUTION 1

Increase responsiveness through efficiently managed calls

There are many ways virtual receptionists can manage your calls so your firm is responsive to leads and clients while you get billable work done.

Following your customized call-handling directions, virtual receptionists can:

→ Provide a consistent, warm, and professional greeting, eliminating callers from reaching voicemail

→ Identify and route calls based on priority, such as calls from a judge or clerk

→ Route calls:
  – By time of day, day of week, and other schedule preferences
  – Based on the individual preferences of your partners and paralegals

→ Provide overflow call handling only: An attempt is made to reach you first, and the receptionists serve as a "backup" to prevent callers from reaching voicemail

→ Block spam, unsolicited sales calls, and wrong numbers

→ Transfer calls that meet your criteria for an "interruption,"

and notify you of such call-transfer requests via phone, SMS or chat app (your choice)

→ Instead of simply taking a message, schedule call-backs on your calendar when you're not immediately available to receive a call transfer

→ Make outbound calls, in various capacities, to:
  – Leads who completed the "contact" form on your website
  – Clients who need a status update, directions to court, or other non-confidential information
  – Clients with past-due invoices

SOLUTION 2

Qualify potential clients

Solution 1 addressed how you can promptly answer potential clients' calls without interrupting your revenue-generating work. However, not every lead who contacts you is a good client for your firm. When enlisting the help of a receptionist service, make sure the receptionists are not only capturing but also qualifying your leads, so that only those people or businesses who are well qualified to be your clients are live-transferred to you or receive time on your calendar for a call-back or consultation.

> **REMEMBER:** A receptionist service is most useful when it not only responds to but also screens and filters your calls.

Follow these steps to standardize and hand-off lead qualification to virtual receptionists:

1. Identify your must-have criteria for leads. In addition to basic contact information, you could ask potential clients for:
   – A brief description of case or legal need, or to select from a list of practice areas, if you have many (e.g., Family Law, Estate Law, etc.)
   – Their ZIP Code or county, if relevant to your ability to serve clients
   – How they heard about your law practice, so you can better track your marketing campaigns

2. Determine the minimum criteria that must be met for a lead to "pass" your qualification steps. Qualified leads will be invited to receive a call-back or schedule a consultation with you.

3. Determine the "next step" in the new-client vetting process. Is it a call-back, consultation, or should the receptionist attempt a live call transfer?

4. Determine your policy on consultations, including considerations for duration, format (phone, video call or in-person), and whether it will be free or paid.

5. Build an online form with the qualification questions above. Share the link to this form with your receptionists, along with your directions so they can qualify leads on your behalf.

6. If your receptionists will be scheduling call-backs and consultations for you, share the link to your online calendar, too.

   TIP: A list of affordable calendaring solutions is available at https://smith.ai/integrationtype/scheduling

7. That's it. Now sit back and watch as your calendar fills up only with appointments with well qualified leads!

Schedule appointments

Virtual receptionists are capable of scheduling not only call-backs and consultations with potential clients, but also appointments with existing clients.

Once you choose an online scheduling tool, set up multiple appointment types that cover the full range of ways your client meetings take shape. For example, you can create appointment types for:

→ Weekly client phone check-ins
→ Conference calls
→ Depositions
→ Hearings
→ Mediations

Provide a private link to these "meeting types" to your receptionist service, along with directions for booking each type of appointment.

Pro Tips:

→ If you have multiple attorneys at your firm, create a calendar for each attorney so they can implement appointment types based on their unique preferences. For example, one attorney may prefer morning meetings only.

→ If you prefer to review appointments before a booking is confirmed, choose a calendaring solution that offers

"booking with approval" such as ScheduleOnce. With this feature, receptionists can select up to 3 appointment times for a client, but the appointment is not confirmed until you review and select the time that best suits you.

→ If multiple attorneys at your firm are equally available to accept new client meetings, include their calendars on the same appointment type and let whoever is available first (or whenever the client prefers to meet) receive the booking. You can even prioritize bookings among multiple attorneys based on seniority, case type, and more.
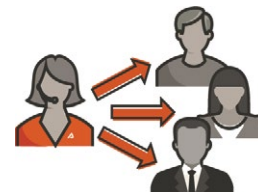
Provide appointment reminders, updates, and client check-ins

Virtual receptionists are useful not only for creating new appointments, but also for reminders, updates, and check-ins. Clients appreciate attorneys who keep them regularly informed. Similarly, attorneys are happiest when clients appear for meetings, court dates, and other appointments on time!

When you enlist the help of a receptionist service that offers **outbound calls** you can outsource the following tasks:

→ **Appointment reminders**, to reduce cancellations and no-shows

→ **Court-date updates and directions**, to reduce delays and navigation-related errors

→ **Client check-ins**, to deliver peace of mind to clients waiting for case updates

Collect payments

Payment collection is one of the most important aspects of any law practice, and thanks to easy, affordable, and compliant solutions like LawPay and Headnote, you can accept online credit card payments for a fee as little as 2.9%, a cost that is easily justified and far outweighed by the increased revenue you will receive (far faster).

Your clients make car payments, mortgage payments, college tuition, and many other significant charges online. Making payments to your law practice should be just as easy for them.

Virtual receptionists can accept payments by phone on your behalf for:

→ Consultations
→ Deposits
→ Retainers
→ Invoices
→ Past-due payments

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When it comes to late payments, our recommendation is to not just collect payments when the client finally calls with their payment method, but instead to have your receptionists make outbound calls to these clients. Simply provide a list of names, amounts, and phone numbers to your receptionists each month, and let them follow-up on your behalf. Some attorneys report that clients are more likely to fulfill payment requests that come from receptionists than those that come from the attorneys directly. These attorneys cite the lack of personal connection as a benefit here: The close client-attorney relationship can lead to awkward payment conversations; when the conversation is initiated by a neutral third-party like a receptionist, that can lead to greater comfort on the client's part.

Monetize "bad" leads through systematic referrals

Let's revisit Solution 2. The lead qualification process yields both good leads who you're eager to convert into paying clients, but it also yields "bad" leads who don't pass your qualification criteria. Many attorneys will let these leads "fall off" their radar as soon as it's determined that the lead isn't a good fit for their firm, but that's a mistake: These leads often need legal services, and just because your firm may

not be able to or be interested in providing these services to them, that doesn't mean you can't earn revenue from them. The way to monetize these leads is through paid referrals. It's a straightforward process that can yield revenue up to 40% of the fees received by the "referred" law firm:

1. Identify the law firms and solo attorneys whom you recommend, and who complement but do not compete with your practice areas. (This may include attorneys who overlap with your practice areas, but work outside certain counties or jurisdictions where you practice.)

2. Arrange referral fee agreements with these attorneys, and make a list with their contact information and the criteria that must be met for a lead to be referred to their firms.

3. Share this list (not including the details of the referral fees you will receive) with your receptionist service, along with any instructions for making approved referrals on your behalf.

4. That's it! Enjoy the additional revenue from your referrals when leads hire attorneys on your recommendation.

Pro Tips:

→ Before accepting referral fees, be sure to review all of the relevant referral fee rules provided by your state and local bar association.

→ For example, The Florida Bar provides an "ethics packet" on referral fees.

→ Familiarize yourself with the article "Referral Fee Dos and Don'ts" from the Illinois State Bar Association, which

provides very helpful recommendations and considerations for attorneys.

→ Periodically review and update your list of referral firms and attorneys to reflect your current preferences.

Reduce data-entry chores and operational inefficiencies

Virtual receptionists can ease the time-consuming burdens of data entry. They can also help attorneys realize operational efficiencies. Here are just a few of the ways virtual receptionists can facilitate greater productivity in your law practice:

Automate data entry and potential client engagement with software integrations

Receptionist services that offer integrations with your software can automatically pass information to those systems, which drastically reduces manual data entry. Examples include:

→ CRM or intake software integration: Create contact records for new callers, update contact records for existing clients, and log call summary notes as new communication activities in each contact's "timeline."

→ Calendar integration: Add new appointments with leads and

clients, from simple 15-minute call-backs to one-hour in-person client meetings.

→ Marketing automation software integration: Add new leads to your newsletter list and email marketing campaigns. Not every new lead will immediately convert into a new client; this way, your firm stays top-of-mind.

Hand-off conference call coordination
Reduce time spent corralling conference call participants by leveraging conference call "convening" services like Smith.ai's Operator service. Your receptionist will gather everyone on the conference line at the scheduled time, and then invite you to join, so your time isn't spent chasing down participants or waiting for them to join.

Receive discrete call-transfer notifications
Your receptionist service should be discrete and enable you to run a more professional law firm. To that end, Smith.ai offers SMS notifications for incoming call-transfer requests in lieu of a phone call. When an incoming call would be impolite, inconvenient, or impossible (perhaps when you're in court), this option allows you to silently accept or reject a call transfer with the utmost discretion.

Clients appreciate attorneys who keep them regularly informed. Similarly, attorneys are happiest when clients appear for meetings and court dates on time. With help from a receptionist service that offers outbound calls, your responsiveness both to and from clients significantly increases.

SET YOUR GAME PLAN

It's up to you now. Follow these six simple steps for success.

READY TO START MAKING SOME HAND-OFFS?
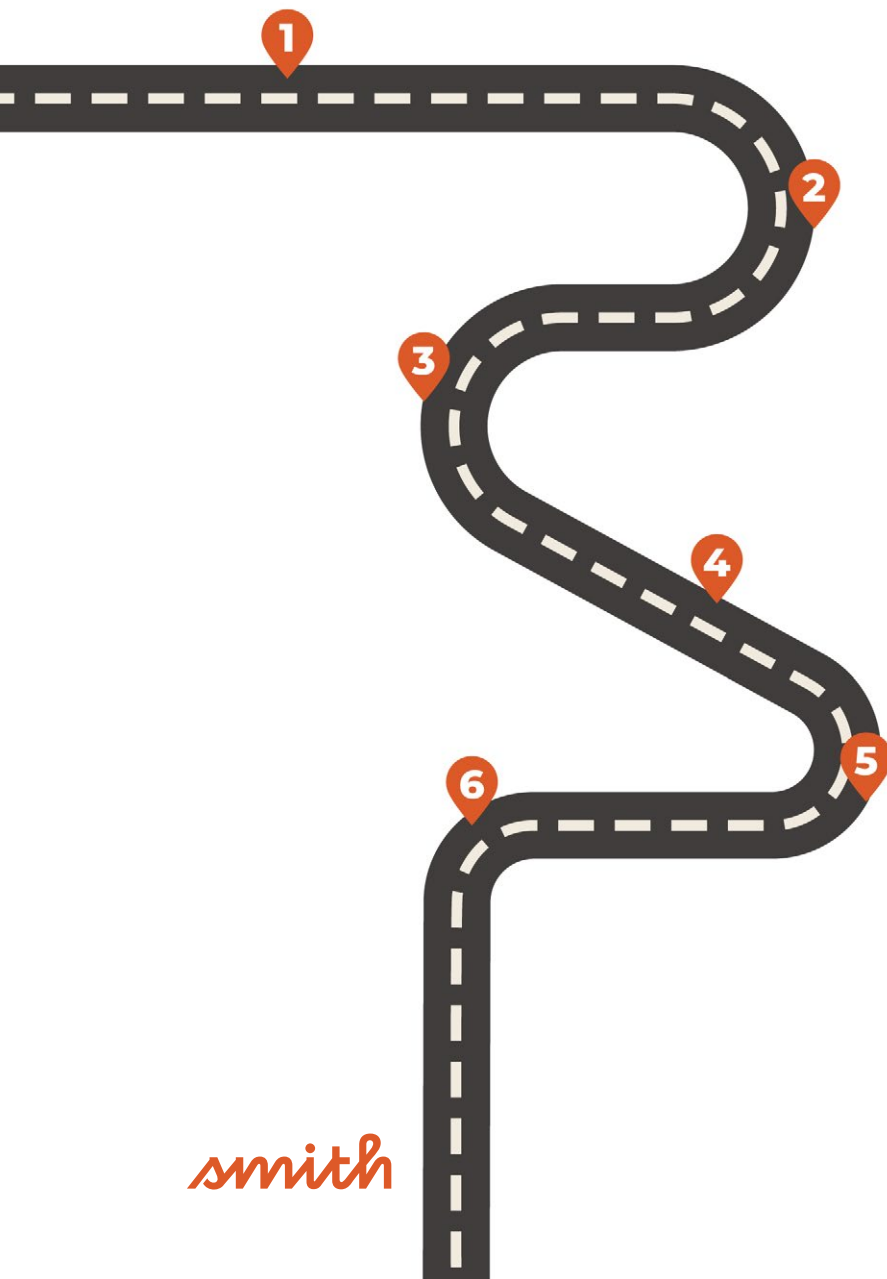
Here's what to do **next** to set your law firm up for **success**.

1. Track your time for one week:
→ Log all of your work, identifying every instance as either "billable" or "non-billable."

2. For all instances of non-billable work, determine whether you will maintain it yourself or offload some or all of it using a new process, software, or service. Tag each instance of non-billable work based on how you intend to handle it moving forward:
→ Self: You will continue doing it yourself
→ Streamline: You will stop or reduce the times you are doing it
→ Automate: You will use software or an app to do it
→ Outsource: You will hand it off to a service, such as virtual receptionists

3. Prioritize fixes by considering three factors: time consumption, importance, and urgency.
Tips:
→ Qualification & payments are often the most time-consuming and most easily outsourced.
→ Data entry & lead follow-up are often the most easily automated.
→ Consider using the Eisenhower Decision Matrix to guide your decision making.

4. Fix the top three issues in the next 30 to 90 days, depending on scope, cost, and difficulty.

5. Wait one to two months to re-stabilize. Fix or address another one to three issues per quarter.

6. Assess the impact of your changes every quarter. Consider the following impacts in your assessments:
→ Cost and time savings
→ New earnings, leads, and clients
→ Overall client satisfaction, as measured by client surveys and referral volume from existing clients
→ Changes to your work/life balance, stress levels, sleep quality, and other wellness indicators

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GETTING STARTED WITH SMITH.AI VIRTUAL RECEPTIONISTS

Whether you're exploring using virtual receptionists for the first time or switching from another receptionist service, learn what makes Smith.ai special and how to get started in four simple steps.

WHAT'S SPECIAL ABOUT SMITH.AI VIRTUAL RECEPTIONISTS

Not every virtual receptionist service offers lead qualification, new client intake, outgoing calls, and referrals. Almost none have 15+ software integration partners. Even fewer leverage AI. Smith.ai Virtual Receptionists offers unparalleled receptionist services by combining our proprietary AI software with best-in-class professional, U.S.-based receptionists.

What is AI? That stands for "artificial intelligence." It automates decision making, speeds up the completion of routine tasks, and reduces time by delivering answers that would otherwise require research. Human error is reduced and efficiency is drastically improved. It is the combination of artificial intelligence and human intelligence that sets Smith.ai apart from other virtual receptionist services. Examples of our use of AI include:

→ Automatic spam blocking of 20 million numbers

→ Caller identification for personalized greetings

→ Easy status changes via SMS, such as "Do Not Disturb" when you arrive at court

→ Data integrations for accurate lead qualification, such as an instant ZIP Code check that identifies a potential client's county.

Smith.ai distinguishes itself further by billing per-call, not per-minute. Phone calls with leads who need to complete an intake form by phone or track down their credit card to book a consultation can take three to five minutes. You get predictable monthly costs when you're charged per-call, and it's also far easier to calculate your marketing costs.

Beyond AI and per-call pricing, Smith.ai offers the following exemplary services and features:

→ Inbound and outbound calls

→ Lead capture and qualification

→ Appointment scheduling and reminders

→ Customized call handling procedures

→ Call screening, prioritization, and VIP lists

→ Instant call summaries and daily summary reports

→ Spanish-speaking receptionists

→ Coverage Monday to Friday, 6am to 6pm PST / 9am to 9pm EST

ATTORNEYS WHO USE SMITH.AI VIRTUAL RECEPTIONISTS REPORT MORE QUALIFIED LEADS, HAPPIER CLIENTS & IMPROVED WORK/LIFE BALANCE.

"The ease of use, reasonable cost, and very professional staff have made this one of my best business decisions of the past year."

KEVIN LEVINE, IMMIGRATION ATTORNEY

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15+ WAYS SMITH.AI CONNECTS TO YOUR SOFTWARE

One of the reasons attorneys prefer Smith.ai is our robust integrations with their contact management, marketing automation, scheduling, and billing software.

Our integrations list grows weekly; here are just a few of our current partners.

For the latest updates, please visit https://smith.ai/integrations.

Clio

Agile CRM

Capsule CRM

ActiveCampaign

Headnote

Acuity Scheduling

Appointy

HubSpot

Infusionsoft

LawPay

Lexicata
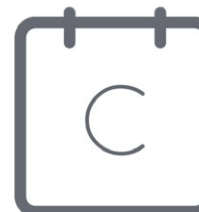
Calendly

PracticePanther
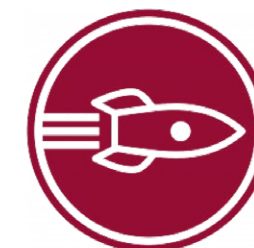
Rocket Matter

ScheduleOnce

GETTING STARTED IS EASY

1 Complete the new client onboarding form.

2 Receive a 10-call free trial.

3 Select a monthly plan, starting at just $60/month.

There is no contract or setup fee. Change or cancel anytime.
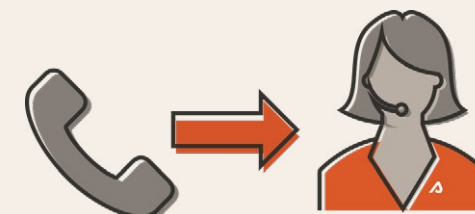
4 Forward calls to your Smith.ai receptionists.

VISIT SMITH.AI TO LEARN MORE

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OTHER SERVICES FROM SMITH.AI:
CLOUD PHONE SYSTEM AND WEB CHAT

Yes, there's more! Further improve your law firm's responsiveness and productivity with Smith.ai's integrated communication services for your calls, texts, faxes, and web chats.

ALSO FROM SMITH.AI:
CLOUD PHONE SYSTEM

KEYPAD

The most advanced & affordable small-business phone service for $25/month.

Trusted by lawyers, consultants, agencies, and small business owners for superior call quality, intelligent routing, and reduced interruptions.

→ Reliable & professional.
   – Call & text from any device
   – 1,000 minutes & 250 texts
   – Route calls with menus, schedules, blasts & sequences
   – Fax, call recording & voicemail transcription available

→ Headache-free.
   – Transfer your business number
   – Mask calls from your personal cell phone
   – Automatic spam blocking
   – U.S.-based support
   – Easy integration with Smith.ai Virtual Receptionists
   – **No contract or setup fee**
   – **14-day money-back guarantee**

LEARN MORE AND SIGN UP FOR KEYPAD AT SMITH.AI/KEYPAD

"Hands-down better than RingCentral."

JOSH YOUNGBLOOD, JLY TECHNOLOGIES

ALSO FROM SMITH.AI:
WEB CHAT

"Web Chat will be the perfect companion to Smith.ai's call-answering services."

CARRIE WARD, WARD LAW GROUP, LLC

The fastest & friendliest way to capture website leads for solo & small-firm attorneys

Smith.ai is known for superior virtual receptionist services by phone. Now, our receptionists will also capture leads, book appointments, and complete client intake on your website.

→ Live U.S.-based chat agents on duty weekdays 6am to 6pm PST/9am to 9pm EST

→ Lead qualification & intake with CRM integration for complete workflows

→ Appointment scheduling with calendar integration

→ Payment collection with billing software integration

→ Chat-to-call feature for live transfer to you or Smith.ai receptionists

→ Instant chat transcripts via email or SMS. Plus, daily summary reports.

SMITH.AI WEB CHAT LAUNCHES FALL 2018. LEARN MORE AND SIGN UP FOR THE WAITING LIST AT SMITH.AI/CHAT
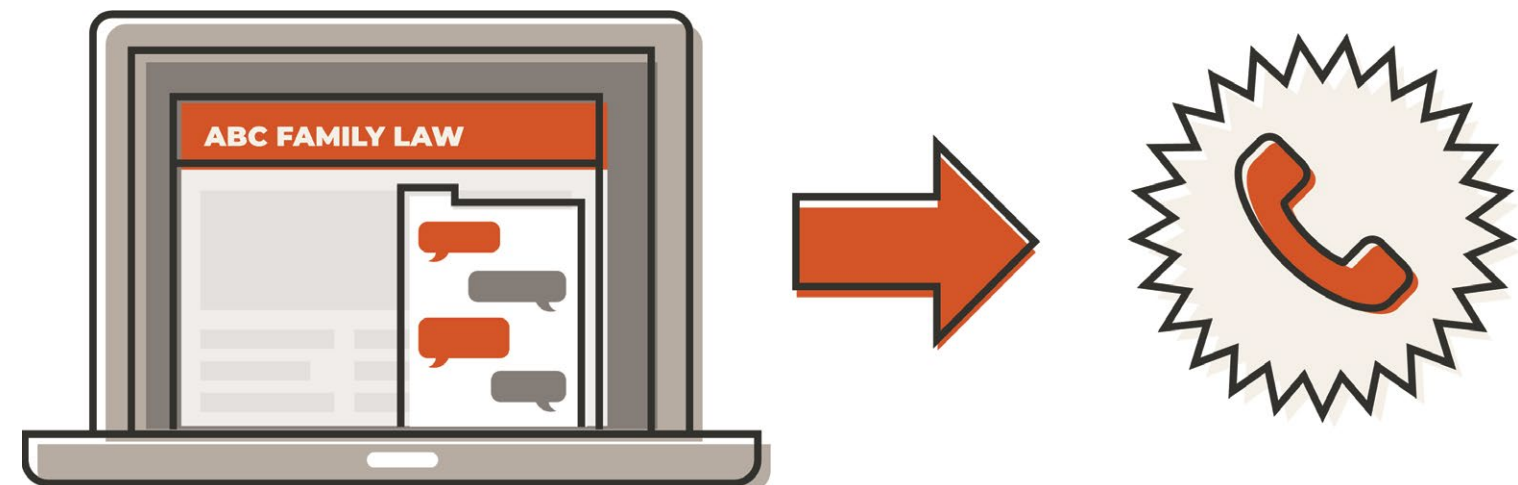
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WANT MORE QUALIFIED LEADS, HAPPIER CLIENTS & IMPROVED WORK/LIFE BALANCE?

SMITH.AI ALLOWS YOU TO LABOR LESS AND LAWYER MORE.

Contact us to learn more or get started:

VISIT	CALL	EMAIL	HOURS
smith.ai	(650) 727-6484	hello@smith.ai	Weekdays, 6am-6pm PST/9am-9pm EST

If you have comments or questions that specifically relate to this eBook, please contact hello@smith.ai.

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