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How to streamline your lead capture

"It seems inevitable that solicitors and lawyers face a future of change... business as usual is not an option for many, indeed for any, traditional legal service providers." **The Law Society, The Future of Legal Services, January 2016**

There is great uncertainty in today's dynamic legal market. Disruption has arrived in the form of funding cuts, new market entrants with the latest technological advances, innovative models of delivery and educated consumers demanding transparency, fixed costs and access to digital information 24/7. Competition for business has never been greater, so how are law firms to survive?

Every challenge can be seen as a chance to reimagine your business and become more effective. There is no doubt that ensuring your firm is connected, so that all departments and systems are integrated and working together to reach optimum levels of efficiency, is going to be key. This will free up time and money that can be invested in new areas. Digital technology is also increasingly important if you are going to stand out from your competitors. We recently found 93% of business professionals believe a connected digital infrastructure is important in anticipating and servicing client issues (Advanced Inaugural Trends Survey, 2016).

However, in today's highly competitive landscape, another vital element must be considered – successful lead capture. It's not just about generating interest in your firm, but ensuring no lead slips through the cracks, and each one is assessed and thoroughly pursued. This requires a systemised approach to managing leads, guiding prospects from qualification to conversion. It is vital to get this methodology right as it underpins all of the marketing strategy. Partners and stakeholders need to get into the business development mind-set, free up resources and time, and invest in staff training in order to focus on this core area for success.

So how do you start generating and making the most of your leads? We have put together a brief guide to take you through the process, highlighting areas to focus on, and pitfalls to avoid.

1. How do I define a lead?

Let's be clear what we are talking about. A lead is someone who has taken an action to contact you, perhaps via your website or in response to an email, that validates their interest in a specific area of your practice. They have the potential to become a client. This turns into a qualified lead once you have made contact with them and ascertained whether or not they are a fit with the legal solutions you can provide, do they look like your 'perfect client' model. If so, they can then be moved through the process and become an opportunity and finally a client. Quality over quantity is important, focus on getting strong, high potential leads rather than more leads – analyse and track them to see where they originated from to inform your marketing strategy in the future.

Of course, leads aren't just new clients. This process is also about creating more business with existing clients. There are things you can do to encourage cross-sell of services to existing contacts. An example of this is keeping your clients informed of your news and updates on a regular basis. If you see a client for a family matter, perhaps offer a 'legal health check' to assess whether they have considered a need for other services. There may not be immediate opportunities, but they could enter your marketing funnel going forward.

2. How can I start to get more leads?

First and foremost, everyone in your firm needs to embrace business development and lead generation, to understand its importance to the business. Although word of mouth continues to be useful, a structured and carefully implemented marketing plan, utilising a number of different marketing channels and tools, with supporting infrastructure and budget, is going to be key.

In order to create this you need to know your audience, and you need to understand their expectations. It starts with listening – not

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just face-to-face but online, via social media and through SEO analysis. What pain points are people highlighting, and where are they looking for solutions? Consumers today are more knowledgeable and empowered. Buying behaviour is changing, fuelled by the innovation of leading consumer brands who build reputations and interact with their customers through social media. Consumers are far more technically savvy, and are more accustomed to accessing services in different ways. They are no longer simply searching on Google for information about legal issues and providers, but instead chatting via social media networks and getting instant advice and feedback, reading review sites, and following thought leaders on Twitter and Facebook also.

If you are going to be successful, you need to be part of this conversation. You need to innovate, and reimagine how you deliver your services. More than just technical legal knowledge, today's lawyers increasingly need to bring business, sales and marketing skills to the table if they are to be part of a thriving firm. As the Law Society states, 'business as usual is not an option'.

3. Which marketing channels will work best?

Decide which areas of your business you want to generate leads for, then focus on the marketing channels that will best suit your message, audience and budget. It is important your message is consistent across whichever channels you choose, and that the technologies are connected. There are a number of different marketing tools you can use:

> Website – this is fundamental, but it is not just a case of creating a site and then letting it sit there. The content needs to be current, updated on a regular basis, and constantly maximised for search engines.

> Social media – vital in gaining feedback and interacting with prospective clients, driving them to your site and raising the profile of your brand.

> Email marketing – a useful tool as your messages can arrive directly in a client's inbox - although you will need to ensure they stand out from the many others. Make sure any incoming leads your firm receives are sent emails on an ongoing basis to nurture their interest. Segment your contacts so that the email message is tailored to their needs, and track them to see who clicks through and to which web pages. Perhaps consider A/B testing – trial a couple of different email messages or subject headers and see which is more successful, and then use this information to plan future campaigns.

> Newsletters – a great way of staying in touch, passing on useful information, and keeping your firm at the forefront of people's minds.

> Magazine or online advertising – this can work, but you need to research/focus carefully on what your prospective clients read in order to control spend. An advertising campaign should be just that – not a one-off piece, but a series of adverts to generate interest over time.

> Webinars – these could be offered regularly to provide free information about key areas and set yourself up as a thought leader, someone knowledgeable and trustworthy.

> Local sponsorship – still a useful device to help with brand recognition, and corporate social responsibility.

> Referrals – long relied on as a source of legal business, you can make this more efficient by printing a referral card which details the areas you specialise in. Educate your contacts, remind them regularly that referrals are important to you, and let them know what your perfect client looks like. Keep in touch, even when referrals aren't coming in, via newsletters and social media.

4. How do I get the most from my website?

A website is normally lower cost/higher return than any other marketing activity, and it should play a key part in building your brand, retaining and supporting existing clients, as well as gaining new ones. It's not just about having a site and then leaving it running, it shouldn't be a static repository of information. The content needs to be current, differentiating and engaging – visitors will notice if your news is a year out of date, and it will be viewed favourably by search engines if content is regularly refreshed. Have you assigned the role of creating content to a team of staff? Do they have suitable time, and will they need some training?

Ensure the right information is easy to find as visitors navigate through your site, and put a clear call to action on each page so people can get in touch with you in a number of different ways. Investigate whether your site is mobile

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friendly, does it accommodate a number of different devices? Is it available 24/7 – consumers today expect to be able to find information and make contact whenever and wherever they need it.

In order for your site to be found you need to keep it maximised for SEO on an ongoing basis so it is always up to date with current practices. Don't forget about links – inbound and outbound links also help determine SEO relevancy. You might want to consider a Pay Per Click (PPC) lead generation campaign to drive traffic. If so, avoid blowing your budget by identifying who your perfect client is, and then creating targeted and specific messages. Ensure you have a relevant landing page with a clear call to action, don't just drop them on your home page. You can use social media to drive people to content on your site as long as it is properly integrated. Traffic from social media such as Twitter, Facebook and LinkedIn is well regarded by search engines.

Decide on the goals for your website, and set Key Performance Indicators (KPIs) to track your achievements against them. Use analytics to determine how your site is performing, and whether your activity is having an impact. Learn which pages are the most popular and focus on them. This data can give you great insight into whether campaigns are working, and help you test new approaches.

5. How can I embrace social media?

Your social media activity needs to wrap around a prospective client's buying cycle, seamlessly guiding them through their decision making. Be aware of where they are in the cycle – are they researching, evaluating, or looking to commit? If you are seen to regularly deliver reliable content your audience will view you as a thought leader, and trust you enough to identify themselves and permit engagement. You need to develop content that builds credibility, educates, converts, and maintains clients. There are some simple steps you can take to leverage social media:

> Create Facebook, LinkedIn and Twitter accounts if you don't already have them, and display these on your website home page

> Integrate your social media accounts with your website

> Start writing blogs that focus on specialty areas, prominently reference and link to these - one firm we know of runs a competition for trainee solicitors to see who can get the most likes on their blogs

> Begin daily Tweeting

> Post questions on Facebook and Twitter to encourage discussion

> Create short, original YouTube videos that solve problems or provide useful tips

6. What do I do once I secure a lead?

The key here is proactivity, incoming leads are precious – don't waste them. If someone downloads an item from your site, always get in touch to enquire if they got what they were looking for and ask if you can help further (solutions that track these downloads and send automatic emails to prospects are crucial here). This is a hugely overlooked area as prospects are often left to their own devices after visiting a site, with no further interaction. If your site enquiries come into a central in-box ensure this is monitored regularly and that a response is generated within an acceptable timeframe. This may be done successfully on a manual basis, although you could look into automated responses and integration with other systems such as a Customer Relationship Management (CRM) for greater efficiency.

Similarly, you need to review what happens when a prospective client rings your firm with a query or to request a quote? Do you have a process in place to make sure this is handled effectively? This involves detailing who would take this call, having a plan if they are away from their desk, and ensuring this member of staff is suitably trained. Take a look at how you record the prospect's details – is it done on paper (which increases the chances of it getting overlooked or lost) or electronically? Where does it go next, who is responsible for responding, and does this always happen within a short timeframe? There needs to be a methodology in place that then details the course of action if the prospect doesn't reply to the quote, who will chase this up, and by when? If the quote isn't accepted do you look into what could have been done differently to win the business so that you can learn from this?

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7. Do I need an integrated system to support lead generation?

The most efficient way to deal with incoming leads is always to get them into an automated and integrated system as soon as possible. This will help with risk compliance, reduce errors and increase efficiency. If this can be connected to your website there will be no need for data re-entry. You will be able to store all the lead details safely and securely in a central repository, and you can mandate the data you always want to capture, such as an email address. Automatic reminders will prompt you to ensure no step is forgotten. It will be easy to build marketing campaigns, and these can be monitored through evaluation tools. The capacity CRM has to manage and analyse a client's interactions and data throughout the customer lifecycle allows you to improve business relationships, thereby boosting client retention and driving growth from increased cross-sell.

As the legal sector becomes more mobile and less office-based, the cloud can provide secure access to this central repository from other locations and on mobile devices, giving greater flexibility. You will be able to store all related documents, such as quotes, electronically. If you choose software that allows you to make ongoing changes as you see the need, your workflow will always be at an optimum. As your prospects move through the system you can then upgrade them from a contact to a client, with all the associated activities and reporting. Tracking the quotes you send out will also allow you to review the status of them, and see how many turn into business - enabling you to focus your future marketing budget on the profitable activities.

The most important thing in streamlining your lead capture is for every member of staff to understand the importance of leads to the business. These employees may be inundated with work, but by creating efficiencies throughout the firm, time can be freed up to successfully implement a marketing plan.

It is vital that the firm also invests in the necessary systems to effectively support these activities, and automates wherever possible to reduce repetitive jobs and free staff to focus on income generating work.

A well-executed marketing plan, incorporating the latest digital technologies, will not only make your firm appealing to prospective and existing clients, but will also help you attract the sort of talent you want on board, people who can take your marketing, and your firm, to the next level.

About Advanced

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