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SIX STEPS TO OPTIMIZE CLIENT INTAKE

**Here's Why Every Firm Needs
an Optimized CRM Workflow**



Introduction

Every law firm understands the importance of maintaining strong client relationships. Yet in many firms, the processes used to manage prospective and existing clients remain informal, inconsistent, and dependent on individual habits rather than structured workflows.

A partner may respond to a prospective client immediately, while another may take days. Intake notes might live in an email thread, a Word document, or handwritten notes. Follow-ups often depend on memory rather than a defined process. None of these behaviors are unusual. They are the natural result of professional organizations focused primarily on delivering legal work rather than managing operational processes.

However, as firms grow, this lack of structure begins to create real business consequences: slower response times, missed opportunities, inconsistent client experiences, and limited visibility into where new business actually comes from. This is why forward-thinking law firms adopt a structured, disciplined, and repeatable Client Relationship Management (CRM) process.

The goal of CRM is to embed consistent client relationship practices directly into the firm's workflow. To be clear, it's a business-critical process that is made more effective by implementing the right CRM software. But software alone does not improve client relationships. What creates value is the standardization of how the firm captures, evaluates, and manages interactions with prospective and existing clients.

A well-designed **CRM process** introduces clarity around several fundamental questions:

- How are new inquiries captured and recorded?
- Who is responsible for responding to them?
- What steps move a prospect from inquiry to engagement?
- How are follow-ups scheduled and tracked?
- Where are notes and communication history stored?



When these questions are answered, client management stops being an ad hoc activity and becomes an operational discipline. For the past several years, **AllRize has been helping law firms establish best practices for Client Relationship Management and ensure that process is well integrated with their internal workflows.** In this guide, we summarize six important steps that will help firms optimize their CRM process and build stronger relationships with clients.

STEP 01

Create a Consistent Client Intake Workflow

Every law firm receives inquiries from multiple sources: website forms, phone calls, referrals, email introductions, and networking contacts. Without a consistent intake process, these inquiries quickly scatter across different systems and individuals.

The first step in building a disciplined CRM process is centralizing how new prospects enter the firm's workflow.

Instead of relying on manual forwarding of emails or informal conversations, every inquiry should generate a structured record within the CRM system. That record becomes the starting point for managing the relationship.

At a minimum, intake records should capture:

- ✓ Contact information
- ✓ Source of the inquiry
- ✓ Practice area or legal issue
- ✓ Initial notes from the conversation
- ✓ Responsible attorney or intake coordinator



By ensuring that every inquiry begins its life inside the CRM, the firm establishes a single source of truth for client engagement.

STEP 02

Define a Clear Intake Pipeline

Once inquiries are captured, they need to move through a defined progression of stages. Without this structure, prospective clients can easily stall in the process or be forgotten altogether.

A CRM pipeline introduces a standardized path that prospects follow from initial contact to formal engagement.

Typical stages might include:



New Inquiry

The prospect has contacted the firm.



Initial Review

An attorney or intake specialist evaluates the matter.



Consultation Scheduled

A meeting or call is arranged.



Consultation Completed

The firm determines whether to proceed.



Engagement Decision

The client retains the firm or declines.

Each stage represents a clear status in the relationship. By visualizing prospects within this pipeline, firms gain immediate visibility into their active opportunities and can quickly identify bottlenecks. Just as importantly, the pipeline structure ensures that everyone in the firm understands the current status and action items associated with each prospective client.

STEP 03

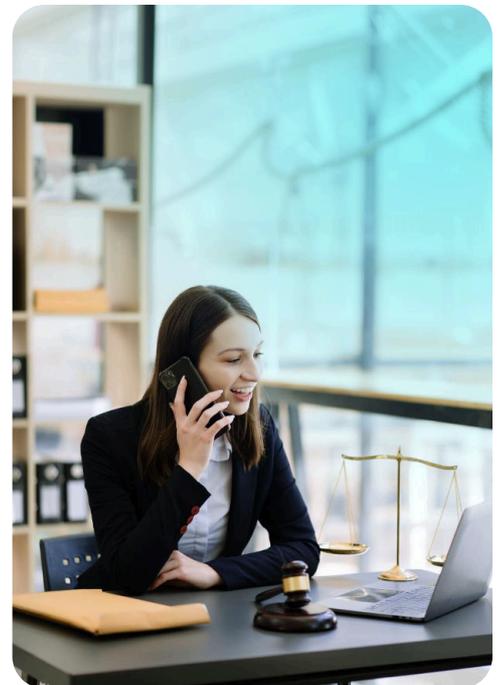
Establish Communication Standards

Consistency in communication is one of the most important factors influencing a client's perception of a law firm. Prospective clients often evaluate firms not just on expertise, but also on responsiveness and clarity. A structured CRM process helps firms maintain these standards and define clear expectations for communication.

For example:

- ✓ Initial responses to inquiries occur within a defined timeframe.
- ✓ Consultation confirmations are automatically sent to prospects.
- ✓ Follow-up messages are scheduled after consultations.
- ✓ Status updates are recorded within the CRM.

You only get one chance to make a first impression. And these practices ensure that clients receive a professional, predictable experience regardless of which attorney or staff member they interact with. **Over time, this consistency becomes part of the firm's brand.**



STEP 04

Capture Institutional Knowledge

Another important function of CRM is preserving the firm's collective knowledge about its client relationships. When communication history is stored in personal email accounts or private notes, that knowledge disappears when staff members leave the firm or change roles.

A disciplined CRM workflow ensures that every meaningful interaction—emails, meeting notes, consultation summaries, and follow-ups—is recorded in a shared environment.

This allows:



Attorneys to quickly review the history of a relationship



Staff members to support ongoing client communication



Firm leadership to understand how business development efforts are progressing

In effect, the **CRM becomes the institutional memory** of the firm's client relationships.

STEP 05

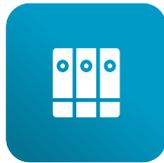
Connect CRM to the Firm's Operational Workflow

While CRM begins with intake and relationship management, its value increases significantly when it becomes integrated with the firm's broader workflow. When a prospective client becomes an active client, their information should be seamlessly integrated and shared with the systems used for legal work.

This may include:



Creating a new matter record



Opening document folders



Initiating billing and accounting profiles



Scheduling case-related tasks

When these systems are disconnected, staff must manually recreate information in multiple applications. But when they are integrated, **the transition from prospect to client becomes smooth and efficient.**

Modern practice management platforms enable this connection by embedding CRM within a larger operational framework. In these environments, client relationships, case workflows, documents, and financial data exist within a unified system, eliminating the friction that often exists between separate tools.

STEP 06

Measure and Refine the Process

Once a structured, repeatable CRM process is in place, firms gain something that was previously difficult to achieve: visibility into how business development actually works.

Because inquiries, consultations, and engagements are all tracked within the system, leadership can begin to answer important questions:

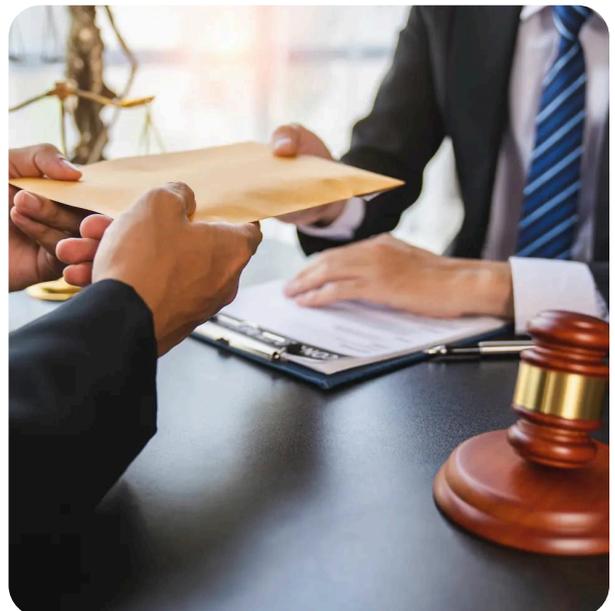
-  Which marketing channels produce the best clients?

-  How long does it take to convert prospects into engagements?

-  Where do prospects drop out of the intake process?

-  Which practice areas generate the most inquiries?

These insights allow firms to refine both their marketing and operational strategies. **Rather than relying on anecdotal impressions,** firms can then make decisions based on real data.



CRM Automation and Integration

This guide has outlined six important steps necessary for law firms to establish an effective CRM process. But it's also important to understand the value that intelligent CRM software can provide in helping firms optimize their client relationship process. For example, AI-powered CRM software can automate and accelerate many of the common, repeatable tasks necessary to ensure fast response to client inquiries. These include drafting emails, tracking tasks and deadlines, automating client response, and more. This not only improves client relationships, it also frees lawyers to focus more time on billable projects. AllRize provides law firms with AI-powered CRM software that delivers this value.

Even better, when the CRM software is embedded within a broader practice management system, client relationships become seamlessly connected to every stage of legal work. For example, a new client record created during the intake process can automatically generate a matter in the case management system. Documents associated with that matter can be stored in an integrated document repository. Time tracking and billing can connect directly to the same client profile.

This unified architecture eliminates the need for the duplicate data entry typically required when using multiple disparate tools, and **provides a complete, consolidated view of the client lifecycle.**

In addition to offering a powerful CRM solution, AllRize also provides many law firms with its complete, award-winning, AI-powered practice management system. The platform combines CRM with marketing, matter management, document management, accounting, and even GRC controls. The AllRize solution enables law firms to establish seamlessly integrated AI-powered workflow automation for managing both client relationships and legal work.

It's also worth noting that AllRize is a Microsoft Partner and, as a result, AllRize is seamlessly integrated with all the Microsoft productivity tools law firms already use – including SharePoint, Teams, Word, Outlook, and more. The result is a powerful practice management solution with a single UI that can help automate tasks, boost staff productivity, enhance client experience, and ultimately accelerate revenue growth.

Let's talk about how AllRize CRM can help you ensure your firm is delivering a satisfying, high quality relationship to every prospective client interested in your services.

Learn more at allrize.ai

