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BUSINESS DEVELOPMENT: CRM AND COMMUNICATION

SPECIAL REPORT

Business Development: CRM and Communication Special Report
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About

The Business Development: CRM and Communication Special Report is a publication of the Legal Tech Publishing division of the Legal Tech Media Group (LTMG) **legaltechmg.com**.

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Welcome to Legal Tech Publishing's Business Development: CRM and Communication Special Report
By: Cathy Kenton and Brian Dalton

Cathy Kenton, CEO,
Legal Tech Media Group/Legal Tech Publishing

CRM has become the lifeblood of modern law firms. It is the firm's virtual front door helping successful legal professionals communicate with prospective clients, automating the intake and engagement process, and connecting with other systems in the firm. Today's clients expect and deserve timely responses to inquiries and legal professionals that use technology to deliver outstanding representation.

In this Buyer's Guide, we explore technologies that assist lawyers and law firms in successfully building and growing their practices.

Use this guide to explore the latest in this critically important legal tech category.

To your success,

Cathy Kenton,
CEO, Legal Tech Media Group/
Legal Tech Publishing and

Brian Dalton,
SVP, Breaking Media

Brian Dalton, SVP, Breaking Media

lawmatics

Lawmatics Automation Empowers Firms to Thrive and Maintain Focus on Delivering High-Quality Service

"Lawmatics is a powerful and innovative platform that helps law firms grow their business and streamline workflows through high-level features that stand out from other legal software solutions, including CRM, intake, and marketing automation."

Company Name Brand(s)
Lawmatics

Product Name Brand(s)
Lawmatics

Latest Developments and Updates

- The Lawmatics Artificial Intelligence (AI) feature is an email builder that helps users create emails from scratch, edit email tones to be more formal or friendly, and assist with grammar and spelling. Known as LM[AI], this tool is the new go-to for quickly and effortlessly drafting content in plain text emails.
- Automations can now run every time a selected form is submitted rather than just once.
- Task management now includes recurring tasks, templates, and sub-tasks. Custom task statuses allow teams to stay organized with their to-dos, as well as facilitate communication through task comments and mentions. Task progress logs provide a comprehensive record of all activity associated with a particular task, instantly unlocking a detailed timeline of all updates and changes.
- Advanced Conditional Logic and filtering now allow users to take their data analysis to the next level by combining multiple criteria using advanced conditional logic in reports. Hidden insights and trends are uncovered, allowing users to make data-driven decisions by layering both "and" and "or" conditions.
- Message Center is an all-in-one dashboard for tracking and managing client communication. Users can stay on top of their inbox with centralized client messages — spanning texts and Client Portal interactions — in a single organized hub.
- Event Management created to support events such as webinars, seminars, and other networking events, with built-in confirmations and reminder emails.

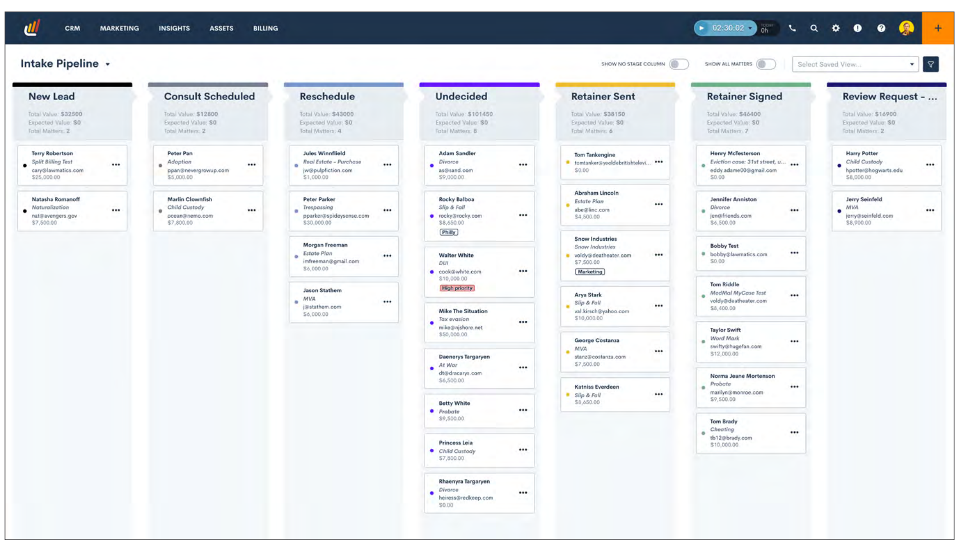

Figure 1: Lawmatics CRM Pipeline shows the status as the titles of each stage of an intake process. Below the title is the total value for the matters, the expected value, and the total number of matters in that stage, followed by a list of each PNC.

> “Lawmatics is cloud-based software to automate and optimize client intake workflow, from lead generation to engagement and retention. A firm can nurture leads with personalized and automated email and text messages and set up triggers and workflows based on the actions and behaviors of a lead, such as filling out a form, opening an email, or scheduling a consultation.”

Streamline the Conversion from Lead to Client

Customer relationship management (CRM) applications are a powerful tool for lawyers who want to improve their client relationships and grow their practice. In the legal field, relationships are everything. Clients choose lawyers based on trust, reputation, and referrals. Lawyers must maintain and nurture these relationships to grow their practice and retain clients. Lawmatics helps lawyers by managing contacts and communications in one place, segmenting contacts by practice area, industry, location, and more, sending personalized and targeted messages, and automating follow-ups and reminders. It further supports connectivity by measuring the effectiveness of marketing campaigns, identifying new opportunities and cross-selling services, enhancing collaboration and communication within the firm, and improving client satisfaction and loyalty. The Lawmatics Checklist for Practice Growth is a valuable resource to strengthen and drive firm success.

Lawmatics is a powerful and innovative platform that helps law firms grow their business and streamline workflows through high-level features that stand out from other legal software solutions, including CRM, intake, and marketing automation.

Contact Management and Intake

The CRM and intake process in Lawmatics integrates with email, calendar, phone, and other tools, enabling a firm to manage leads and clients. Lawmatics automates the intake process, sending proposals and contracts, collecting payments, and communicating with clients seamlessly.

Lawmatics is cloud-based software to automate and optimize client intake workflow, from lead generation to engagement and retention. A firm can nurture leads with personalized and automated email and text messages and set up triggers and workflows based on the actions and behaviors of a lead, such as filling out a form, opening an email, or scheduling a consultation. Users can also segment leads based on practice area, location, referral source, or other criteria. Build multi-step processes with automated steps built into the protocol to enhance information management. Lawmatics Pipeline keeps track of the progress of matters, giving users an at-a-glance view of the steps in a process and where a potential new client (PNC) falls in those steps. As the PNC moves through the process, their status will be updated, and their progress will be shown in the Pipeline. *See Figure 1 on the previous page*.

For example, a firm can create a booking form on its website where a PNC can schedule a consultation. A drop-down menu lets a PNC choose the practice area and sends the client a customized questionnaire matching their needs. Set up

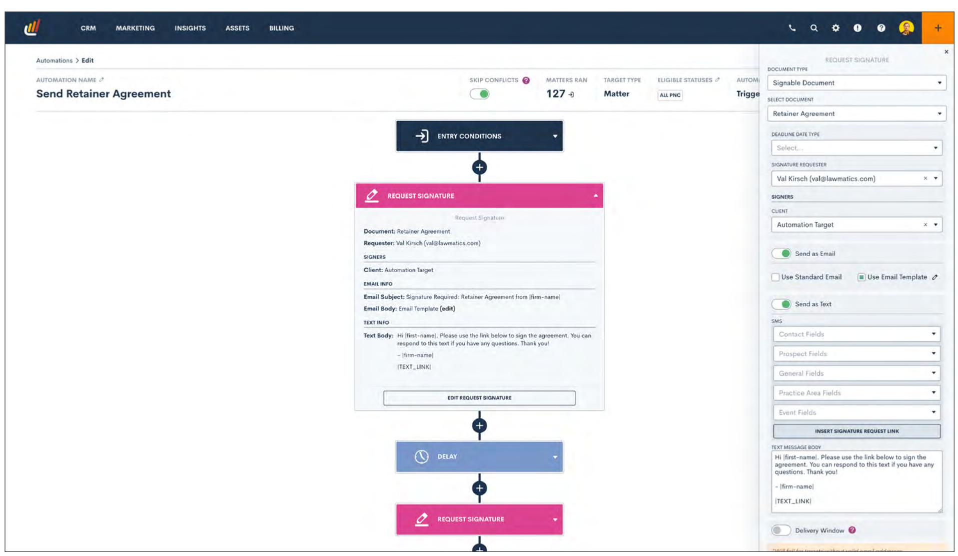

Figure 2: Automations are available via the settings gear in the top right of any Lawmatics page. Automations are given a name and description, triggers are set, and resulting actions are named. Click the presets button to browse pre-made trigger options or add a custom trigger. Automation can be triggered when a matter enters a particular stage and used to move a matter to a given stage.

> "Lawmatics empowers a firm to create and send personalized and targeted email campaigns to prospects and clients. Use templates, custom fields, and dynamic content to tailor messages to each recipient."

automation triggered when someone books a consultation, sending the PNC a text message with a link to the form. The dynamic and interactive questionnaire is designed to collect all relevant information needed to prepare for the consultation, such as personal details, assets, beneficiaries, and power of attorney. It adapts to the answers, asking for clarification or posing new questions.

The questionnaire can be hosted on the firm's website and can be broken down into sections. A PNC can fill it out at their own pace, and progress is auto-saved when the questionnaire is filled out via the link sent to them. Once the questionnaire is completed, the consulting lawyer is notified and can review the answers before the consultation, delivering a clear picture of the goals and challenges in order to offer the best possible service.

Automation in Lawmatics is a powerful tool that allows a firm to customize and streamline workflows for client and case management. There are two pieces to every automation: triggers and actions. Triggers cause a matter to enter into automation, and actions occur once the automation triggers, including task creation, email, or matter information updates. *See Figure 2 on the previous page*.

Marketing

Lawmatics offers a range of marketing capabilities to attract more leads, convert more clients, and retain more referrals. Lawmatics empowers a firm to create and send personalized and targeted email campaigns to prospects and clients. Use templates, custom fields, and dynamic content to tailor messages to each recipient.

Lawmatics also enables a firm to communicate with contacts via text message. Send automated or manual texts to confirm appointments, send reminders, request feedback, follow up on inquiries, or collect e-signatures, payments, or documents from clients.

A firm can automate marketing processes with workflows and triggers, creating workflows that automatically send emails, texts, or tasks based on certain events or conditions. For example, a firm could create a workflow sending a welcome email when a new lead fills out a form, a follow-up email when they open the welcome message, and a text message when they click on a link. Use triggers to update the status, tag, or field of a contact based on their actions or responses.

Track and optimize lead generation, client intake, conversion, and retention to maximize business development efforts. Lawmatics offers a marketing campaigns feature and integrates with popular tools such as Google Analytics. A firm can monitor the sources and quality of their leads, automate email marketing and follow-up campaigns, segment clients based

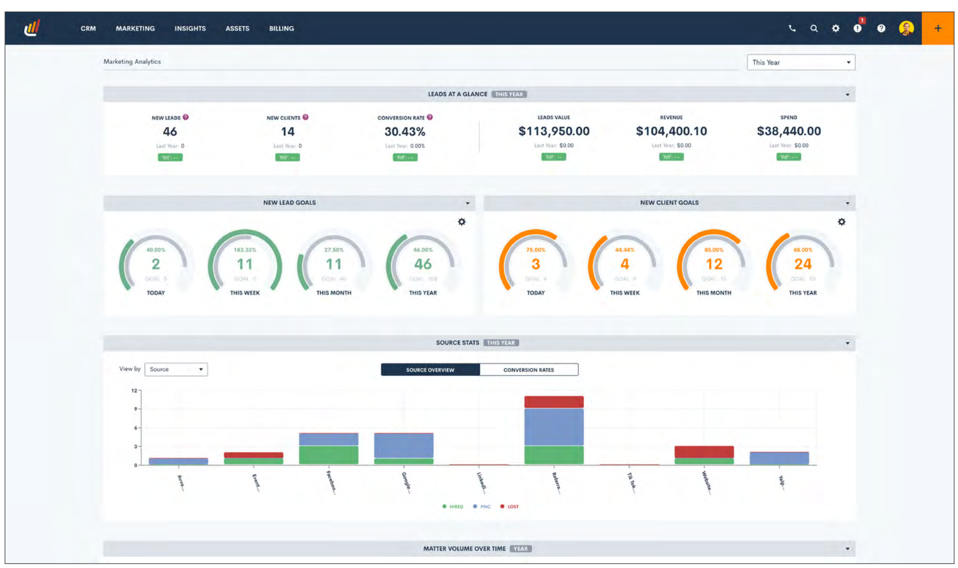

Figure 3: Market Analytics provides visual data analytics and insight into Lawmatics marketing drip campaigns. A firm can see who's opening, clicking, and sharing emails, identifying which leads to reach out to and which ones to continue nurturing.

on various criteria, measure return on investment (ROI) and cost per acquisition (CPA), and generate reports and insights to improve marketing decisions. The Marketing Analytics dashboard provides key metrics based on marketing performance. *See Figure 3 on the previous page*.

Lawmatics is designed to help a firm save time, increase efficiency, and grow their business. By using Lawmatics, a firm can focus on delivering high-quality legal services to their clients while Lawmatics takes care of the rest.

Pricing

Pricing tiers are suited to law firms' unique needs. The Starter plan for individuals is $149/month, the Team plan for small firms is $279/month, and the Professional plan for mid-size firms is $649/month. A Premium plan for large firms and agencies is available for $1,149/month. Custom Enterprise pricing is also available.

There is a $399 one-time setup charge and a 12-month minimum agreement. Two-way SMS messaging is $25/month, the Time & Billing module is $29/month/user, and the user must have a Lawmatics user account. Reach out to Lawmatics to get custom pricing for your firm.

Who is Lawmatics?

As an all-in-one CRM platform, Lawmatics can automate the most robust suite of client engagement tools, from marketing automation, client intake, time & billing, email and event management, document assembly, and more. Lawmatics was founded in 2017 by attorney Matt Spiegel and software engineer Roey Chasman. Having previously founded a leading case management software, Matt developed a revolutionary vision of the client intake process driven by automation. Based in La Jolla, California, Lawmatics was named Product of the Year at the 2023 Sales and Marketing Technology Awards by Business Intelligence Group and has repeatedly been recognized as a High Performer and Momentum Leader in G2's quarterly reports.

Why Buy Lawmatics?

- Lawmatics' customizable automation platform delivers an immediate, personalized experience at every stage of the client journey, including marketing and intake through referrals.
- Lawmatics is an all-in-one hub for scheduling, communication, time & billing, marketing analytics, and more.
- By leveraging Lawmatics, firms can boost efficiency and prioritize casework.

Learn More About Lawmatics Today!

Lawmatics has even more features to help your firm! To find out more, schedule a demo today or reach out to the sales team by calling (800) 883-1105.

MATTERLY

Matterly Combines Legal Practice Management and CRM into Affordable, Custom-Built Software for Law Firms

> **"The Matterly Salesforce App is preconfigured for client intake and matter management. The app includes an accessible matter entry wizard and custom data objects or types to manage contacts, assign matters, track time, create invoices and expense records, and support client payments and external payers."**

Company Name Brand(s)
Baobab Partners, Salesforce

Product Name Brand(s)
Matterly, Salesforce

Latest Developments and Updates

- Expansive low-code and no-code customization tools.
- Assign attorneys and staff to legal teams and assign teams to matters.
- Additional integrations with state e-file systems.

Effectively Managing Client Data for Business Growth

Managing a growing law practice today requires organizing, storing, and leveraging an increasing amount of data to serve clients best and meet their legal needs. Many lawyers use one-size-fits-all legal practice management (LPM) software, which is not optimized for their practice areas and needs various third-party tools to handle client data, produce work product, and resolve legal issues.

Without the right tools, firms get mired in administrative and data management tasks that take them away from revenue-generating work directly related to resolving legal issues. They may use some features of a costly LPM software package that suit their practice areas while other features lie dormant. In effect, firms may lose or not use the data necessary to resolve client issues timely and efficiently and need more resources to grow their business. Modern firms must use state-of-the-art software to drive down costs and directly address client needs.

Matterly offers all-in-one practice management software that uses highly customizable customer relationship management (CRM) software to provide

Figure 1: Matterly provides custom home pages for users based on their role at the firm, be it partner, associate, paralegal, or billing specialist. Here, Matterly dashboards display matters by type, requester, and status.

> “Design workflows with tasks and use automation to advance a matter to resolution. When all tasks in a stage are complete, a workflow can automatically move to the next phase or pause for you to move it to the next step manually.”

affordable, custom-built LPM software tailored to your firm‘s unique practice areas and client data requirements. The product uses no-code and low-code software for customers to configure or consult with Baobab Partners to develop a scalable solution based on your unique practice.

All-In-One Legal CRM Your Way
Matterly is an all-in-one LPM software built on the Salesforce cloud-based CRM platform. The platform makes it easy for firms to find prospects and track leads, retain clients, and provide customized legal services at scale.

The Matterly Salesforce App is preconfigured for client intake and matter management. The app includes an accessible matter entry wizard and custom data objects or types to manage contacts, assign matters, track time, create invoices and expense records, and support client payments and external payers.

A Matterly home page supports customized dashboards, reports, and lists of matters, clients, and more based on your role at the firm and supports granular access permissions. For example, partners can view the firm‘s overall financial health, the last billing statements, the status of all matters, and the progress regarding the highest value clients. Associates and paralegals may see only their assigned legal requests, matters, and tasks, and billing specialists may only see rates, time records, and invoices. *See Figure 1 on the previous page*.

You don‘t need to know Salesforce to navigate Matterly. The web-based user interface (UI) has feature-based menus along the top of the browser to select from matters, accounts, contacts, task assignments, and more. *See Figure 2*.

In addition to the easy navigation, you can use customized wizards to create matters, workflows, reports, and more. Matterly has several matter types or templates to get started, including administrative law, banking, collections, corporate, immigration, litigation, and a generic type. A new matter wizard can walk you through adding case information, client data, contacts, additional entities related to the case, location, court information, and billing (hourly or contingency). You can also add custom fields to capture information during intake or when you create information related to the matter, such as assignments, time slips, invoices, and payment data.

Design workflows with tasks and use automation to advance a matter to resolution. When all tasks in a stage are complete, a workflow can automatically move to the next phase or pause for you to move it to the next step manually. Matter statuses appear in stages atop a matter page so you can quickly determine the next steps and milestones and avoid bottlenecks. You can also automate task creation and assignment when a dependent task is completed.

Using a CRM as its core, Matterly makes it easy to view all client matters and drill into

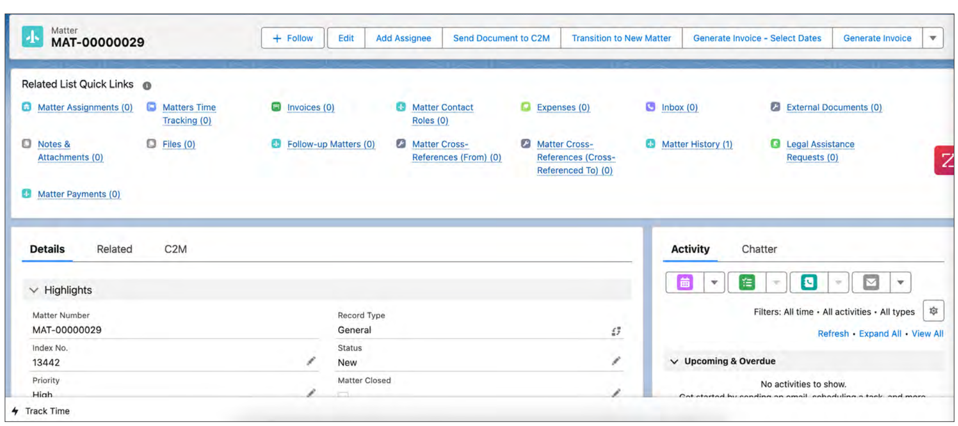

Figure 2: Matterly's web-based UI makes all features accessible from the top of a browser window. In this view, Matterly puts data and documents in the context of a client matter with related links above and activities and chat or chatter in a side panel.

> **"Just like Matterly can create invoices in a few mouse clicks, it can generate other documents using templates for letters, contracts, memorandums, and other content. The templates pull in client, matter, and related information to populate a document, generate a custom document in Microsoft Word format (docx) or PDF, and attach it to the record."**

client and matter records to add or edit information and view a history of activity by calendar items, tasks, time records, and email in a separate panel view with an internal chat function (chatter) to communicate with other users quickly. Matter records show quick links to related resources to access matter documents, time tracking, invoices, expenses, etc. You can easily add associated contacts and cross-references to matters to identify third parties, such as adversaries, conflicts, and potential defendants. Matterly uses a relational database in Salesforce, so new information is available to the firm immediately upon entry.

Generate Time and Expense Records, Invoices, and Documents

You can assign attorneys and staff to legal teams and set the teams to matters. When team members create custom time and expense records, they automatically save to the matter and calculate to generate invoices.

Start a timer for a matter in the web UI that remains persistent until you turn it off or start a new timer. Add custom reminders to close out timers before moving to the next task. When you stop a timer, add a description and Matterly creates a time record with the applicable rate for the attorney or staff, calculates the cost, and adds it to the matter record. You can configure expense and time records with custom fields and labels, such as the Uniform Task-Based Management System (UTBMS).

Use a wizard to create invoices by selecting the matter and inclusive dates. Matterly pulls in the applicable time and expense records for the period for you to verify and choose. Instead of the wizard, you can automate invoicing based on configurable time frames, e.g., every 14 or 30 days. Matterly can build the invoices with client information, attach the proper contacts, generate PDFs, and make them available to review and email.

Just like Matterly can create invoices in a few mouse clicks, it can generate other documents using templates for letters, contracts, memorandums, and other content. The templates pull in client, matter, and related information to populate a document, generate a custom document in Microsoft Word format (docx) or PDF, and attach it to the record. Permissioned users can review the entire document history in the matter files.

Email Integration and Parsing

Matterly uses Salesforce integration and synchronization with Microsoft Outlook and Calendar to install an add-in or extension to your email inbox. The extension allows you to log in to your Matterly account from Outlook and log messages into a matter in Matterly. The extension also allows you to create events, tasks, contacts, clients, leads, assign tasks, and log time in Matterly. This integration also supports email parsing.

With Matterly's email parser, you can automatically integrate notifications and documents from the New York State Courts Electronic Filing (NYCEF) system and Florida Courts E-Filing Authority with Matterly. The automation sends e-file messages of scheduling and appearances in state court

Record Type Text	Status	Matter: Matter Number	Billing Rate - Contingency	Billing Rate - Hourly	Matter: Record Type	Subject
Administrative (2)	New (1)	MAT-00000026	-	-	Administrative	-
	On Hold (1)	MAT-00000003	5.00%	£275.00	Administrative	Matter on hold due to administrative tasks by the client
Antitrust (1)	New (1)	MAT-00000013	-	-	Antitrust	-
Banking Law (7)	New (4)	MAT-00000015	5.00%	£275.00	Banking Law	-
		MAT-00000009	8.00%	£375.00	Banking Law	-
		MAT-00000010	6.00%	£250.00	Banking Law	-
		MAT-00000011	5.00%	£325.00	Banking Law	-
	Bankruptcy (1)	MAT-00000005	5.00%	£350.00	Banking Law	-
	Payment Plan (1)	MAT-00000014	9.00%	£325.00	Banking Law	-
	Escalated (1)	MAT-00000018	5.00%	£400.00	Banking Law	-
Collections (7)	New (6)	MAT-00000022	-	-	Collections	Test
		MAT-00000024	-	-	Collections	Test 3
		MAT-00000023	-	-	Collections	test 1
		MAT-00000025	-	-	Collections	-
		MAT-00000027	-	-	Collections	-
		MAT-00000028	-	-	Collections	-
	Working (1)	MAT-00000006	-	-	Collections	Collections matter for Levinson Gould
Commercial (1)	Working (1)	MAT-00000016	6.00%	£250.00	Commercial	-
Eviction (1)	New (1)	MAT-00000008	5.00%	£235.00	Eviction	-
General (1)	New (1)	MAT-00000000	10.00%	£150.00	General	Request information about collections procedure

Figure 3: The Matterly report writer provides detailed reports on firm financials and matters in a familiar spreadsheet layout like Microsoft Excel and Google Sheets.

to Matterly. Set up an email forwarding rule in your inbox to identify matching index numbers or captions in email. Matterly sends the message to a related service address to process and store it in the respective matter's inbox records. The parser also sets up a job to run every 15 minutes to download any documents available in an e-file system and send them to the matter's inbox records. The Matterly email parser should work with other state e-file systems if you can identify index numbers and captions in an email. Although this is not a full integration, it brings you a step closer to working in a one-stop shop for LPM software.

Reporting

With Matterly's built-in reporting, you can create highly customized reports and graphical dashboards without a third-party tool. The app provides custom reports of your firm's real-time and historical financial and practice data so you can make data-driven decisions. If you can use Microsoft Excel or Google Sheets, you can easily use Matterly reports. The report writer lets you work with all your firm's data points to select one or more data groupings in columns and rows where you can order columnar data and apply filtered views by date and other parameters for granular reporting. *See Figure 3 on the previous page*.

You can edit fields in the report view and convert spreadsheets to graphical layouts, such as bar and line graphs, charts, donuts, funnels, and scatter dots. For more robust reporting, Matterly can use Tableau, PowerBI, and other third-party business intelligence tools and report writers.

Implementation and Integrations

Matterly built its solution on the Salesforce platform for its reliable infrastructure, extensible features, and CRM capabilities. Salesforce also has a strong App Exchange to integrate third-party software. It takes law firms approximately four weeks to get up and running after uploading data and customizing dashboards, client intake, and templates. Matterly integrates with QuickBooks, Stripe, and other payment processors. It works with DocuSign for e-signature, Click2Mail to mail physical documents to multiple recipients, and Proof to deliver papers in person for service of process and other needs.

Pricing

Matterly starts at $125 per user per month, which includes a Salesforce platform license. Baobab Partners provides professional consulting services at an add-on cost.

Who is Matterly?

Matterly is all-in-one legal practice management software built on the Salesforce CRM platform. It was released in 2021 by **Baobab Partners**, a Salesforce-certified consulting firm based in New York City. The company was founded by Duke University graduates Stratten Waldt and Oladimeji Abidoye in 2017. From the two-person team, Baobab has grown to more than 20 employees from Côte d'Ivoire, the Dominican Republic, Ireland, Kenya, Lagos, South Africa, the US, the UK, and Zambia. The company took its name from the Baobab tree, a sub-Sahara African native often called the "Tree of Life," highly valued for its nutrient-rich fruit.

Why Buy Matterly?

- Use legal CRM to customize matter management and create invoices and documents.
- Matter intake and creation wizards save time and reduce errors.
- Create custom dashboards and reports to make data-driven decisions.
- Integrate state e-file notices and documents with matter management.

Try Matterly Today!

Try Matterly for free (no credit card required) for 30 days.

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