

# 10 COMMON CLIENT INTAKE BLUNDERS

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AND HOW SIMPLYCONVERT PREVENTS LAW  
FIRMS FROM MAKING THESE MISTAKES



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# INTRODUCTION

## **Consumer expectations have changed.**

Today's legal consumer has come to expect simple, straightforward, and instant access to products and answers – the kind of service they get from companies like Amazon, Uber, Netflix and GrubHub.

Yet many law firms today are still using tools and products developed to respond to legal clients in the early 2000s – tools that are merely stall tactics, delaying the consumer from getting what they really want: *timely legal guidance*.



In **10 Common Client Intake Blunders**, SimplyConvert Founder and CEO Jessie Hoerman identifies client intake mistakes that law firms are still making and shows how the SimplyConvert platform addresses them. After reading this eBook, you'll see how SimplyConvert can help you transform your client intake to become more client-centered, while engaging more clients and lowering intake costs.

## BLUNDER #1:

### Only offering English-language intake.

According to the U.S. Census Bureau, 21.6% of people in the United States speak a language other than English at home – for 13.4% the language spoken at home is Spanish.

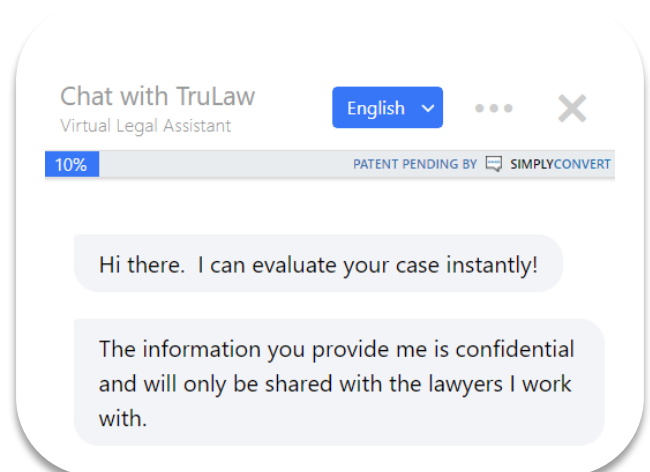
A 2018 article in the Washington Post points to the fact that the share of non-English speakers has been rising steadily for more than three decades. According to the article, U.S. residents today are nearly twice as likely to speak a language other than English at home as residents in 1980.

Not considering the language demographics of your region could be a costly mistake. For example, a firm in southern Florida only offering intake in English could quickly lose potential clients to competitors that greet website visitors in Spanish.

### The SimplyConvert Remedy: TRI-LINGUAL INTAKE

Firms using SimplyConvert's Instant Case Evaluator chatbot on their websites are automatically setup to converse with potential clients in English, Spanish, and French. Users can easily switch to the language of their choice by clicking the dropdown menu at the top of the screen.

Chatting with potential clients in their preferred language and letting them know whether your firm can assist them in your first conversation is just one of the ways SimplyConvert can help you become a more client-centered firm.



## BLUNDER #2:

### Forcing clients to relive personal trauma over the phone.

Processing assault can be emotional and distressing for victims. For most, it can take years – even decades – to speak about the trauma they experienced. Sadly, in most states, a victim of sexual assault will be victimized again by the justice system as the deadline to report abuse is often long gone before they're ready to come forward.

It is imperative that attorneys integrate trauma-informed practices to reduce re-traumatization of the survivor.

#### **The SimplyConvert Remedy: PUT THE SURVIVOR FIRST**

SimplyConvert helps trauma-informed law firms provide legal advocacy centered around five key principles to ensure that survivors feel respected, dignified and in control: (1) safety; (2) trustworthiness; (3) choice; (4) collaboration; and (5) empowerment.

Providing a safe environment for survivors 24/7 is challenging. SimplyConvert starts by giving the survivor a choice: begin their healing journey through a secure online portal or calendar a time to speak with a qualified trauma specialist. Increasingly, survivors choose to “speak up” online prior to talking to a lawyer or specialist.

Recently, SimplyConvert offered the secure client portal as an option for sexual abuse victims in completing a twelve-page form required by the Boy Scout abuse bankruptcy court. Given the option to use SimplyConvert's secure client portal versus having a phone consultation, 77% of Boy Scout abuse survivors chose to provide these very private details online.

Unfortunately, a majority of survivors reaching out for legal assistance will be barred by a statute of limitation from seeking justice through the courts. SimplyConvert's AI-based automation assures that these individuals are provided resources to assist them with self-care while gently letting them know that your law firm will be unable to assist.

The last thing a trauma-informed law firm should do is allocate this very difficult conversation to a call-center or non-trauma informed individual as this may cause further trauma. Law firms utilizing SimplyConvert's AI-based automation can be assured that the investment made in providing survivors with trauma specialists will result in survivors that your firm can assist. SimplyConvert directs only qualified, signed clients to your trauma team.



## BLUNDER #3:

### Using a standard form for EVERY litigation.

Most law firms don't limit themselves to handling only one type of case. Yet, so many firms use the same generic form to collect information from their prospective clients – whether they're seeking help with an automobile accident or a nursing home abuse incident. A single form can't possibly ask all the right questions about all the different case types you handle *AND* gather enough information to tell you whether you can help that potential client.

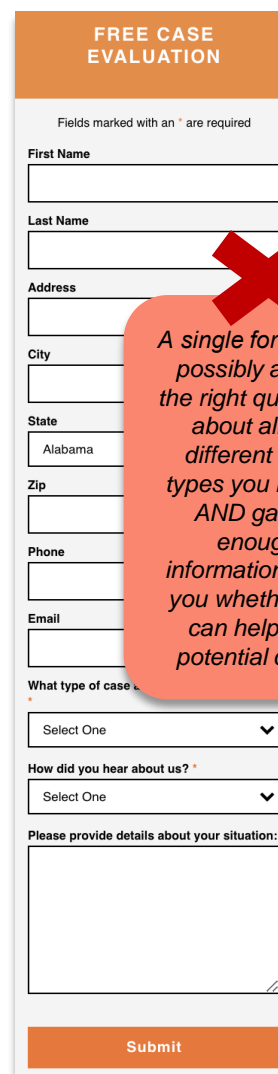
Sure, you can reach out to the potential client for additional details. BUT you spent valuable advertising dollars bringing them to your site in the first place. Not qualifying the potential client on the spot is equivalent to watching them walk out the door.

### The SimplyConvert Remedy: LITIGATION-SPECIFIC CASE INTAKE CRITERIA and AUTOMATIC CONTRACTING

SimplyConvert's chatbot can conduct conversations about 100+ different litigations and practice areas, asking lawyer-developed, criteria-based questions that determine whether your law firm can help a potential client. If they qualify, you can opt to have the bot automatically send a contract and sign the client on the spot.

How effective is SimplyConvert at qualifying and signing clients? We recently conducted a study that included 150,000 conversations with individuals looking to hire a lawyer over a 2.5-year timeframe. The results speak for themselves:

- 30% of leads were qualified.**  
 Firms were able to focus on the 45,000 that qualified as potential clients and not spend any time or money chasing the 105,000 unqualified leads.
- 60% of qualified leads signed an automated contract prior to speaking to anyone.**  
 That means 27,000 stopped shopping for lawyers and immediately signed contracts.
- 66% of qualified leads signed with SimplyConvert lawyers.**  
 In 2.5 years, lawyers on the SimplyConvert platform signed 29,700 clients. Without SimplyConvert's 24/7 legal guidance solution and automated contracts these lawyers would have lost 25% — or 27,000 — qualified clients.



**FREE CASE EVALUATION**

Fields marked with an \* are required

First Name

Last Name

Address

City

State

Zip

Phone

Email

What type of case is this?

How did you hear about us?

Please provide details about your situation:

**Submit**

*A single form can't possibly ask all the right questions about all the different case types you handle AND gather enough information to tell you whether you can help that potential client.*



## BLUNDER #4:

**Not requiring phone numbers and email addresses and/or not having a method to verify the contact information.**

Let's face it: people are hesitant to hand over their contact information. When given the option to not provide a phone number or email address, they often don't. And when required to fill in the information, they don't always provide real information.

But drawing prospective clients to your website takes advertising dollars.

Not being able to contact someone who filled out a form on your site is not only frustrating – it wastes your time and costs you money.

enter before signing a contract. Users also have the option to receive the code via an automated phone call.

Two-factor verification is one more way SimplyConvert looks out for you and your clients. With this enhancement, you can rest assured that the information in your CRM is accurate, and you're able to get in touch with your clients.

### The SimplyConvert Remedy: TWO-FACTOR AUTHENTICATION

SimplyConvert protects firms from ghost leads and spammers with **two-factor authentication**. Here's how it works:

The user provides their contact information when the chatbot indicates their case results are ready.

Once the user submits the information, SimplyConvert sends a four-digit code to the email address and phone number that the user must

### But that's not all...

SimplyConvert takes two-factor authentication a step further by encouraging users to verify their second contact method after they've signed a contract. Read more about why this is so important on page 9.

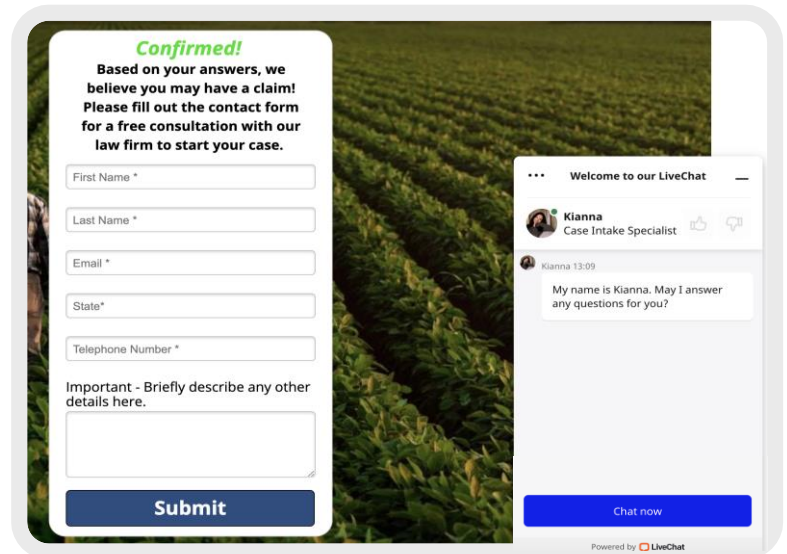
## BLUNDER #5:

### Allowing a chatbot or live chat to steal your clients.

How often do you check the landing pages used in your advertising?

Take our advice. If you are spending money on advertising, make sure it's being done right: check your landing pages for blunders.

Marketing firms that don't turn off live chat and chatbots on landing pages are wasting your money. Most marketing firms today understand the importance of building a landing page to gather the right information. But if your agency doesn't understand technology, they might unknowingly leave your live chat on that slick landing page and, **BOOM!** You likely just paid a live chat company \$30 to steal your client.



Okay, so *maybe* you will get an email from your live chat vendor and maybe your team will read it, but in 2021 live chat modules are where good conversations go to die. Potential clients are not waiting around for you to read that conversation – they just hired your competitor.

### The SimplyConvert Remedy:

### GATHER CRITERIA, QUALIFY, LEAD RANK, CONTRACT, REPEAT

Lawyers are the AI behind our chatbot. SimplyConvert's tech-heavy landing pages are designed for one thing – finding you clients.

SimplyConvert's landing pages are built to be client-centered. There are no distractions between a potential client and your firm. We simply gather the necessary criteria, qualify and lead rank the potential client and provide instant e-sign contract if to clients that qualify. It's simple, straight-forward, and success-based.

In fact, law firms that utilize SimplyConvert landing pages often steal clients from law firms still using live chat or non-client centered chatbots.

## BLUNDER #6:

### Believing that all chatbots are created equal.

Okay, so your law firm finally understands that today's clients expect instant legal guidance which can't be provided by a live chat agent who knows nothing about law or your law firm. Studies show that 75% of paid live chat leads resulted in individuals who were either unreachable or hired another lawyer while the firm's intake team reviewed live chat ramblings.

But what are your alternatives? Today, there are hundreds of thousands of chatbot options all promising to be your legal solution. Don't fall into the trap of believing that all chatbots are created equal. Unless the bot can evaluate the facts of a case against the criteria for qualification and answer the question *"can you help me with my case?"* it is no better than a live chat service or a form on your website.

### The SimplyConvert Remedy: LAWYERS BEHIND THE CHATBOT

Humans are the real "machines" that drive AI. In nearly all cases, they are responsible for choosing the data that's used to train the algorithms, and they specify the outcomes that they want AI to achieve. Machines simply predict the course of action that's most likely to lead to the optimal outcome within the parameters we give them.

There is artificial intelligence, and there is legal experience, and when we put them together we get legal "authentic intelligence." Both parts of the AI equation are equally important.

AI involves drawing insights from the correlation of many different datasets. SimplyConvert draws its intelligence from conversations with legal consumers. In fact, as of October 2021, SimplyConvert has been tested by over 300,000 legal conversations. **Don't be confused: there is no other chatbot on the market that has this kind of expertise.**

### CASE IN POINT

Recently, SimplyConvert ran a study of legal consumer behavior utilizing the advertisement of a competitive mass tort whose target audience consisted of parents in their mid-30s. Even though more than a dozen advertisers were running similar advertisements for this mass tort, **68% of qualified potential clients reaching out for legal assistance through the SimplyConvert advertisement signed contracts for representation with the SimplyConvert lawyers instantly.**

What happened with the non-SimplyConvert-based advertisements? It's quite likely that many of SimplyConvert's signed legal clients visited these advertisements first and either filled out a form or chatted with a bot that provided no legal guidance. Without instant legal guidance, today's legal consumer has no reason to stop the search for assistance.

The law firms behind the non-SimplyConvert based advertisements are fruitlessly chasing down individuals who are already working with SimplyConvert lawyers, and they don't even know it.



## BLUNDER #7:

### Ignoring the client's preferred communication method.

More than half of today's potential clients choose to bypass the simplicity of a "click to call" and instead, reach out to lawyers via a form, chat or email.

A good marketing firm should be able to tell you the percentage of clients that came to you via a mobile device and the form in which they reached out to you. SimplyConvert law firms are seeing more than 50% of their potential clients opting for digital interactions.

Responding with the medium your potential client is most comfortable with increases trust. Disregarding that choice sends a subtle message that you don't care about their wishes decreasing the chance that you will reach that potential client.

#### What is CLICK-TO-CALL?

Click-to-call is a form of web-based communication in which a person clicks an object (usually a phone number) and is immediately connected to a person in real-time.

#### The SimplyConvert Remedy:

### PROVIDE THE POTENTIAL CLIENT WITH A CONSISTENT AND HIGH-QUALITY RESPONSE ACROSS ALL MEDIUMS OF COMMUNICATION

SimplyConvert's lawyer created, AI-driven, criteria-based conversations are available to SimplyConvert law firms in all forms. On websites, SimplyConvert is often used as a chatbot or a "dumb form" replacement. On landing pages, SimplyConvert functions as an instant case evaluator. And, lastly, SimplyConvert's manual intake forms provides intake teams the tools they need to make decisions about potential clients while speaking on the phone.

As real-time intakes of new and potential clients populate the SimplyConvert dashboard, power users understand the other benefit to the **two-factor authentication** – capturing the client's preferred medium of communication. To recap, after submitting information through the instant case evaluation, a qualified potential client receives a four-digit code to the email address and phone number provided. Users also have the option to receive the code via an automated phone call.

SimplyConvert's robust CRM takes note of the user's selected method of receiving the code. When you log in to the dashboard, you will see a blue checkmark next to the user's preferred communication method. Using their preferred method oftentimes results in a higher success rate in reaching the client.

982341	Smith, John	📅 Thu Apr 8, 2021
	✉ johnsmith@gmail.com	🕒 1:52 pm
	📞 618-278-2234	
	📍 New York	

## BLUNDER #8:

### Upselling more lawsuits.

Providing potential clients with a list of other litigations they may qualify for after they've completed a form on your website does not send the right message. Period.

### The SimplyConvert Remedy:

### CLIENT-CENTERED CASE INTAKE THAT IS SENSITIVE TO THE CLIENT'S SITUATION

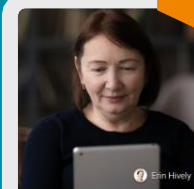
When a client signs a contract, SimplyConvert simultaneously notifies you and sends an email to the client letting the client know that you have received their contract. You can choose to receive these notifications via text or email.

We recommend creating a procedure to ensure that each new client hears from you according to the follow-up standard you set. Automation tools can help ensure that your follow-up process happens no matter what — whether you're out of the office or attending to other matters.

We can't emphasize this enough: your timeliness in reaching out to a new client after they sign your retainer agreement can make or break your relationship.

It's up to you to determine your follow-up time standard, but the survey results for consumer expectations when hiring a lawyer in Clio's 2020 Legal Trends Report can serve as a helpful guide. Clio asked consumers how quickly they expect a response when leaving a phone message or sending an email to a firm they're considering hiring. 10% of respondents said they expect a response within an hour, 24% within a few hours, and 45% within 24 hours. That means waiting more than 24 hours to respond misses the expectations of 79% of those that reach out. Only 5% said they would expect a response beyond 72 hours.

For more tips on starting off on the right foot with new clients, check out 5 *Tips for Making a Great First Impression on New Clients* on the SimplyConvert blog.



5 tips for making a great first impression on new clients

Your submission has been successfully sent.

One of our Intake Specialists will contact you via Phone or Email soon!

**Please expect a phone call or an email shortly!**

See if you (or a loved one) qualify for any of these cases:

Have Hernia Mesh Surgery? [Click this case!](#)

Have Gastric Bypass Surgery? [Click this case!](#)

Have Hip Replacement Surgery? [Click this case!](#)

Have Knee Replacement Surgery? [Click this case!](#)

Exposed to RoundUp? [Click this case!](#)

A great example of what not to do. Attempting to upsell the potential client on additional lawsuits sends the wrong message.



Contract Signed Notification  
Toxic Exposure - Paraquat  
October 25, 2021

Name: Test  
Email: de  
Phone: 616  
Birth Date:  
Case ID: 1  
Lead Rank

We have notified this client that your firm will be following up with them soon. Please consider calling to confirm receipt of the contract as soon as possible. A copy of the confirmation email sent is copied below:

We have considered the contract and the confirmation email sent is copied below:

Dear Test,

We received your signed contract and we wanted to take a minute to let you know that we understand that the choice of an attorney is an important one, and it is a role we do not take lightly.

The attorney responsible for your case is Jessica Paluch. Please feel free to reach out to the legal team at Simply Convert for updates on your case at anytime. You can reach your legal team at 888-878-5295 or [info@simplyconvert.com](mailto:info@simplyconvert.com).

It is imperative that you do not speak to any other lawyers or share information about your case publicly, most especially on social media. You will receive a call from our office shortly to gather additional information about your case so that we can give you the best shot at compensation.

We look forward to fighting on your behalf,

Jessica Paluch  
Simply Convert

## BLUNDER #9:

### Not knowing if your advertiser is TCPA compliant.

If your law firm outsources its advertising and/or client intake functions to a third party that is not abiding by the Telephone Consumer Protection Act (TCPA) you could be left holding the bag. A single violation, which could be a text sent to a client that has not opted-in to receiving communications from you, could cost \$500. If your advertising firm uses auto-dialed calls and/or automated texting without getting proper opt-in, you could be responsible for thousands of dollars of violations per client.

#### About the TCPA

The TCPA restricts phone solicitations -- or telemarketing -- and the use of automated telephone equipment, limiting the use of auto-dialing systems, prerecorded voice messages, SMS text messages, and fax machines. It also requires that entities provide identification and contact information in their messages.

#### Rules that you must follow

- Cannot call residences before 8 a.m. or after 9 p.m.
- Must maintain a company-specific "do-not-call" list of consumers who asked not to be called; the request must be honored for 5 years
- Must honor the National Do Not Call Registry
- Must provide their name, the name of the person or entity on whose behalf the call is being made, and a telephone number or address at which that person or entity may be contacted
- Cannot solicit residences with an artificial voice or a recording
- Cannot send unsolicited advertising faxes

#### Penalties for non-compliance

In the event of a violation, a subscriber may (1) sue for up to \$500 for each violation or recover the actual monetary loss, whichever is greater, (2) seek an injunction, or (3) both. In the event of a willful violation of the TCPA, a subscriber may sue for up to three times the damages, i.e. \$1,500, for each violation.

### The SimplyConvert Remedy: TCPA COMPLIANCE

Because SimplyConvert takes the TCPA rules very seriously, the entire platform was built to ensure our clients are always in compliance. SimplyConvert ensures that potential clients proactively opt-in to receiving communications *before* they can proceed with signing a firm's contract.

#### Scammers are using the TCPA to target law firms

Recently, a SimplyConvert client was targeted by a scammer who thought he could make a quick buck by threatening to sue the firm over TCPA violations.

The man FRAUDULENTLY SIGNED A RETAINER for the firm to represent him in a mass tort lawsuit. Our scammer engaged with the law firm via text multiple times, seemingly trying to increase the amount of TCPA fines that would be due if the law firm were not in compliance with TCPA rules. Then, our scammer sent the firm a demand letter for \$3,000 stating that he would report the firm for TCPA violations if they did not pay him immediately.

Thankfully, the law firm was protected because it uses SimplyConvert for client intake and could quickly prove that the man had provided his contact information and prior express written consent to be called/texted.

#### The bottom line

Knowing that your firm is doing right by consumers will not only give you peace of mind, it could also save you from a major headache, hefty fines, and protect you from scammers looking for a quick payout.

## BLUNDER #10:

**Allowing an advertiser to communicate as someone other than you.**

We've all stopped answering our phones. Spam, fraud, and spoofing calls have made us all weary of answering calls from numbers we don't know, degrading the ability of legitimate businesses to call their clients. The same goes for emails – we rely on spam filters and unsubscribe buttons to cut down on unwanted messages that flood our inboxes. Getting through to clients is getting harder as they fight to block unwanted messages from interrupting their lives.

Law firms that rely on advertisers or case intake support vendors that aren't properly equipped to communicate on behalf of the firm might as well throw their money into the wind. At best, these vendors just aren't getting through to clients. At worst, they're creating distrust for clients wondering whether the third party on the other line is legit.

### **The SimplyConvert Remedy: FIRM-SPECIFIC PHONE NUMBERS & EMAILS**

SimplyConvert ensures that all communications and advertisements sent on behalf of our clients abide by *Model Rule 7.2: Communications Concerning a Lawyer's Services*. When communicating on your behalf, we ensure that the name and contact information of at least one lawyer or law firm responsible for the content is clearly identified.

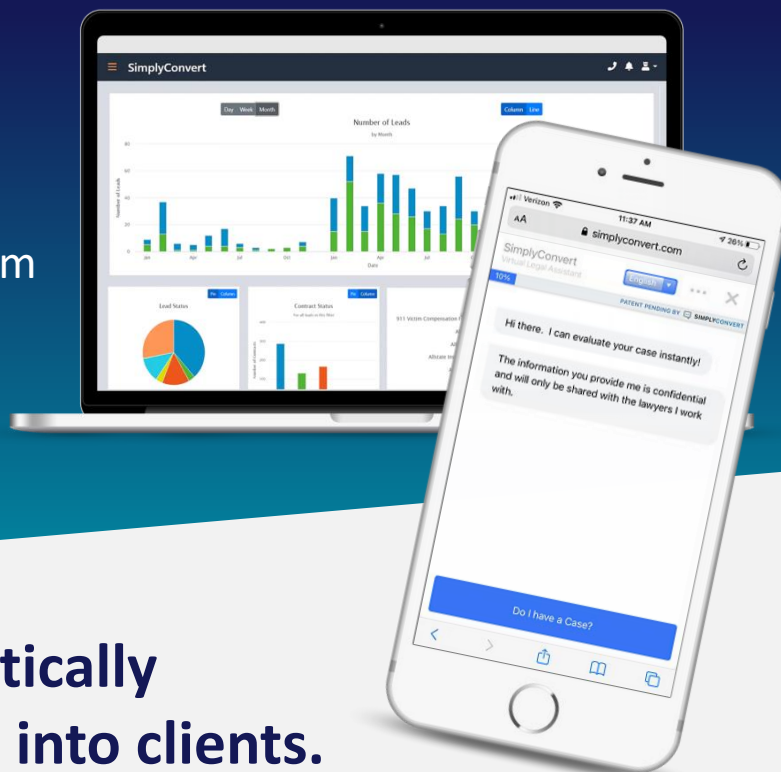
SimplyConvert allows you to customize your electronic communications with your firm logo and any ethical disclosures that need to be included. When you deploy SimplyConvert's intake specialists for client outreach, we ensure that the phone numbers utilized are properly registered to come across as your firm.

**94%**  
of unknown calls  
go unanswered





The complete client intake platform  
you've been dreaming about



## SimplyConvert automatically converts conversations into clients.

Created by a lawyer fed up with not having the right technology to meet her firm's client intake needs, SimplyConvert uses case criteria-based questions to turn chat conversations with your website visitors into signed contracts.



Instant Case Evaluator



Law Firm CRM



Drip Marketing &  
Templated Emails



Reporting Dashboards



Referral Community

### Law firms that automate their client intake with SimplyConvert deliver better client service while saving significant time and money.

In a 2 ½ year study of **150,000 conversations** with individuals looking to hire a lawyer:

**30%**  
of leads were  
qualified

Firms were able to focus on the 45,000 that qualified as potential clients and not spend any time or money chasing the 105,000 unqualified leads.

In 2 ½ years, lawyers on the  
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**66%**  
of qualified leads  
signed with  
SimplyConvert  
lawyers

**60%**  
of qualified leads  
signed an automated  
contract prior to  
speaking to anyone

That means 27,000 stopped  
shopping for lawyers and  
immediately signed contracts.

**Without SimplyConvert's 24/7 legal guidance solution  
and automated contracts these lawyers would have  
LOST 25% — or 27,000 — qualified clients!**

Book a demo today at [simplyconvert.com](https://simplyconvert.com) to see what  
SimplyConvert can do for your law firm.



# Meet SimplyConvert

## Founder/CEO Jessie Hoerman

Jessica Hoerman, founder of SimplyConvert, is a business owner, a lawyer, a CPA, and a former stay at home mom who now finds herself in the legal tech world as a matter of necessity for the growing mass tort and personal injury firm she built with her husband Tor in 2009, TorHoerman Law.

Jessica launched SimplyConvert to control the chaos of legal intakes that overwhelms law firms as well as to diversify TorHoerman Law's client inventory through a robust client referral network, capturing client opportunities that were previously impossible because of the lack of training in other litigation areas.

TorHoerman Law had to screen thousands of potential clients to remain competitive and survive. During the early 2000s, potential legal clients expected a lawyer to return a phone call within a week and, if qualified, would wait to receive an offer for representation in the mail.

By 2015, consumers were starting to expect faster turn-around times. Jessica realized her firm was losing an increasing number of clients because of the shift in consumer expectations. She knew that firms that recognized this shift would benefit from an increase in opportunities and clients.

Though Jessica understood the problem she needed to solve, she could not find the answer in the legal market. She teamed up with her friend, Marty Chrenka, who had the technical expertise she was missing to build the answer to their legal intake problem: SimplyConvert.

During Covid, the consumer shift that began in 2015 accelerated quickly. Today, pre-Covid solutions to intake such as live chat and 24-hour call centers no longer suffice. Legal consumers expect instant legal guidance and rarely answer phone calls. Today's legal consumer rewards companies like Uber, Amazon and SimplyConvert for making their lives easier.

SimplyConvert simplifies legal intake for all parties. Clients reward firms that provide them with a simple and painless way to submit their legal issue by trusting the process. SimplyConvert clients often sign contracts instantly. Lawyer created automation puts every step of the client intake journey – from first conversation to signed client – on autopilot.

Law firms using SimplyConvert are provided a real-time view of all of their marketing efforts and legal intakes, assuring that every marketing dollar is maximized in this competitive industry. In addition, SimplyConvert's criteria-based questions allow tech forward law firms a unique opportunity to convert more potential clients into contracted clients.

Jessica frequently speaks about legal intake, AI and legal technology, and automation for law firms at legal and technology conferences across the country. She can be reached at [jess@simplyconvert.com](mailto:jess@simplyconvert.com).





[www.simplyconvert.com](http://www.simplyconvert.com)