



How Patterson Legal Group Converts 90% of Prospects Into New Clients With Captorra

CASE STUDY



“If you are ready to grow your firm, then you need Captorra. It will help you transform your business, increase your conversions, and sign new clients quicker. It’s a tool that pays for itself.”



TYLER PATTERSON,
PARTNER, PATTERSON LEGAL GROUP



The Client

Patterson Legal Group, L.C.



Legal



USA

WHAT WE PROVIDED

- Lead management software to better track and convert:
 - + Web leads
 - + Chat submissions
 - + Direct phone calls
 - + Referrals
- Automated lead follow-up process
- Electronic signature (eSign) for instantaneous onboarding
- Scheduled reporting allowing Partners to better manage marketing efforts

Patterson Legal Group is a personal injury firm based out of Wichita, KS. They focus on helping accident victims and their families navigate their cases, from the moment they are involved in an accident until the day that they receive a check for their injuries.

The Challenge

IMPROVING LEAD INTAKE EFFICIENCY

Patterson Legal Group relied on a custom-built CRM tool to assist them with new client intake. It was a tool that allowed them to manually enter information from prospects and keep track of callers in their system.

But as their firm grew, they wanted a more dynamic solution that automated many of the outreach efforts that were being done manually.

Sending out electronic contracts via their old CRM was time-consuming. Even though they had maintained a respectable closing rate of 60%, they knew many other prospects were slipping through the cracks.

The 'set and forget' mentality with their old CRM was not working with the increased number of cases. They needed a company that focused on law firm intake, which could stay on top of the latest tools for customer acquisition.





“Under our old system, it used to take us five minutes to prepare and send out an electronic contract. That meant we couldn’t send out the contract while we had the client on the phone. For a lot of people, a contract from a law office is a scary document; if you can’t get a prospect to commit over the phone, they’re less likely to sign up.”



The Solution

A BETTER WAY TO TRACK AND CONVERT LEADS

As soon as Patterson Legal Group adopted Captorra, they noticed a stark difference. Now, leads that contacted them through their website and chat submissions, even after hours, were automatically integrated into Captorra.

With prospect information prepopulated in Captorra, Patterson Legal Group’s intake team can spend more time and energy reaching out to prospective clients.

Two other Captorra features have been especially game-changing:

- 1 Captorra allows the intake team to instantly send out contracts while they have claimants on the phone. This allows them to talk prospects through the contract and gives claimants the ability to sign up on the spot via eSign. This has helped them save anywhere from five minutes to a couple of hours when signing new clients.
- 2 Captorra reports, automatically generated on a daily, weekly, and monthly basis, have quickly become a favorite feature. Being able to instantly access comprehensive insights has allowed the intake team to refine their marketing efforts and improve overall lead intake.



“The dashboards, reporting, and all of the statistics are easily accessible within Captorra. It’s been helpful to have all of that information at your fingertips as soon as you log in.”



The Result

90% CONVERSION RATE SINCE PARTNERING WITH CAPTORRA

Before Captorra, Patterson Legal Group was maintaining a respectable 60% conversion rate. Since partnering with Captorra, that number has jumped. They're now able to convert 90% of prospects into new clients.

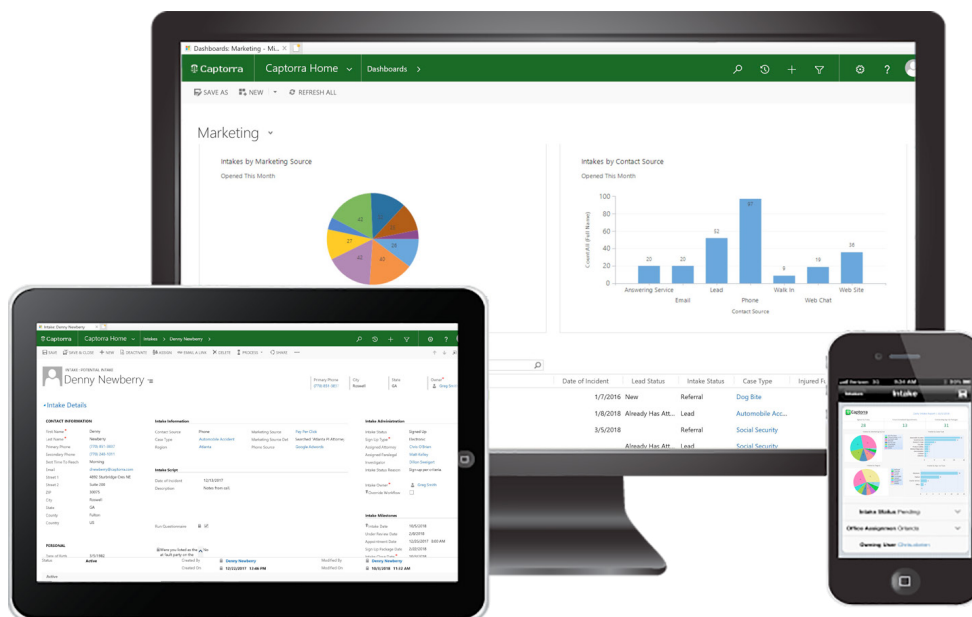
Their business has grown so much that they have expanded their team to keep up with incoming leads. They have now added five additional team members to help manage their increased caseload, and two additional people to their intake team.

Captorra has also given Patterson Legal Group much greater visibility into their lead intake engine. According to Tyler Patterson, Partner at Patterson Legal Group, he really values being able to see the total number of cases signed, weekly comparisons, and documents in progress on a daily basis.

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“After partnering with Captorra, we saw an immediate jump in the number of cases we were signing up. Our focus had to shift from procuring more leads to ensuring that we had the back-end processes in place to handle the immediate growth.”

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Want to beat more of your competitors to the best cases?

Let us show you how Captorra can take your intakes and sign-ups to the next level.

TALK TO ONE OF OUR EXPERTS NOW →