Professional Liability Fund present

More Than Just a Click: Automating the Client Intake Process

Wednesday, February 12, 2020

1 Practical Skills MCLE Credit

Hong Dao
PLF Practice Management Attorney

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503-639-6911
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OSB Center
Tigard, Oregon

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MCLE FORM 1: Recordkeeping Form *(Do Not Return This Form to the Bar)*

Instructions:
Pursuant to MCLE Rule 7.2, every active member shall maintain records of participation in **accredited** CLE activities. You may wish to use this form to record your CLE activities, attaching it to a copy of the program brochure or other information regarding the CLE activity.

Do not return this form to the Oregon State Bar. This is to be retained in your own MCLE file.

Name:	Bar Number:
Sponsor of CLE Activity: OSB Professional Liability Fund	
Title of CLE Activity: More Than Just a Click: Automating the Client Intake Process	Program Number: 64232
Date: 2/12/2020	Location: OSB Center, Tigard, Oregon

☐ *Activity has been accredited by the Oregon State Bar for the following credit:*	☐ **Full Credit.** *I attended the entire program and the total of authorized credits are:*	☐ **Partial Credit.** *I attended _____ hours of the program and am entitled to the following credits*:*
____ **General**	____ **General**	____ **General**
____ **Prof Resp-Ethics**	____ **Prof Resp-Ethics**	____ **Prof Resp-Ethics**
____ **Access to Justice**	____ **Access to Justice**	____ **Access to Justice**
____ **Abuse Reporting**	____ **Abuse Reporting**	____ **Abuse Reporting**
1 **Practical Skills**	____ **Practical Skills**	____ **Practical Skills**
____ **Pers. Mgmt/Bus. Dev.***	____ **Pers. Mgmt/Bus. Dev.***	____ **Pers. Mgmt/Bus. Dev.***

***Credit Calculation:**
One (1) MCLE credit may be claimed for each sixty (60) minutes of actual participation. Do not include registration, introductions, business meetings and programs less than 30 minutes. MCLE credits may not be claimed for any activity that has not been accredited by the MCLE Administrator. If the program has not been accredited by the MCLE Administrator, you must submit a Group CLE Activity Accreditation application (See MCLE Form 2.)

Caveat:
If the actual program length is less than the credit hours approved, Bar members are responsible for making the appropriate adjustments in their compliance reports. Adjustments must also be made for late arrival, early departure or other periods of absence or non-participation.

*Personal Management Assistance/Business Development. See MCLE Rule 5.12 and Regulation 5.300 for additional information regarding Category III activities. Maximum credit that may be claimed for Category III activities is 6.0 in a three-year reporting period and 3.0 in a short reporting period.

About Our Speaker

Hong Dao received a B.A. from the University of Denver and her J.D. from Drake University Law School. She is a practice management advisor for the Professional Liability Fund, providing confidential practice management assistance to Oregon attorneys to reduce their risk of malpractice claims, enhance their enjoyment of practicing law, and improve their client relationships through clear communication and efficient delivery of legal services.

Ms. Dao is a member of Oregon Women Lawyers, the Multnomah Bar Association, and the Oregon Asian Pacific American Bar Association. She is active in the Asian Pacific legal community in Oregon and is fluent in Vietnamese. Ms. Dao is the 2014 recipient of the Oregon State Bar President's Public Service Award.

Before joining the PLF as a Practice Management Advisor in 2014, Ms. Dao worked as a staff attorney at the Oregon Law Center for over four years, presenting community education programs and representing, advising, and advocating for clients in employment, consumer, and housing law matters. Prior to that, she worked on appellate cases as a contractor with the Criminal Division of the U.S. Attorney's Office. She has also served as adjunct instructor of business law at Portland Community College.

More than Just a Click:
Automating the Client Intake Process

February 12, 2020
Oregon State Bar Center

Presented by Hong Dao
PLF Practice Management Attorney

A. PowerPoint slides (attached)

B. Materials and resources (links provided)

   a. Practice available on the PLF website: www.osbplf.org > Practice Management > Forms

      i. New Client Information Sheet with Disclaimer, in File Management category

      ii. Sample intake forms specific to various practice areas

      iii. Engagement Letters & Fee Agreements, in *Engagement Letters & Fee Agreements* category

      iv. Nonengagement Letters and Disengagement Letters, in *Disengagement and Nonengagement* category

   b. Blog article: Client Intake: Making it More Effective and Efficient, by Rachel Edwards, PLF PMA

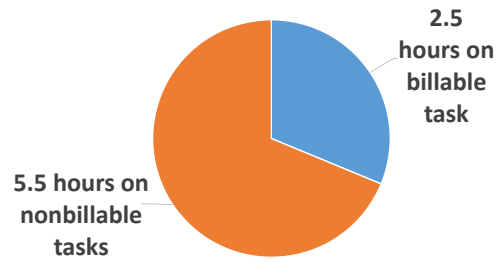
More Than Just a Click

Automating the Client Intake Process

OSB Professional Liability Fund

Hong Dao
Practice Management Attorney
hongd@osbplf.org

On average, attorneys spend:



2019 Clio Trends Report

Data tell us:

1. Not accurately capturing billable hours
   - Habit
   - Software
2. No time to do billable work
   - **Wear many hats**
   - **Admin tasks**

CLIENT INTAKE ENTAILS:

Initial contact

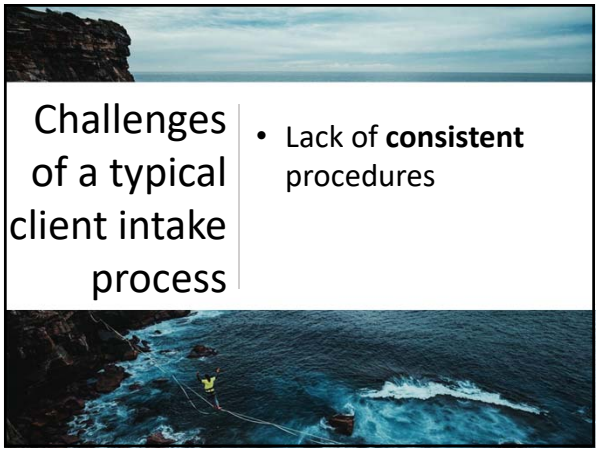
Capture basic Information

Conflict screening

Intake interview

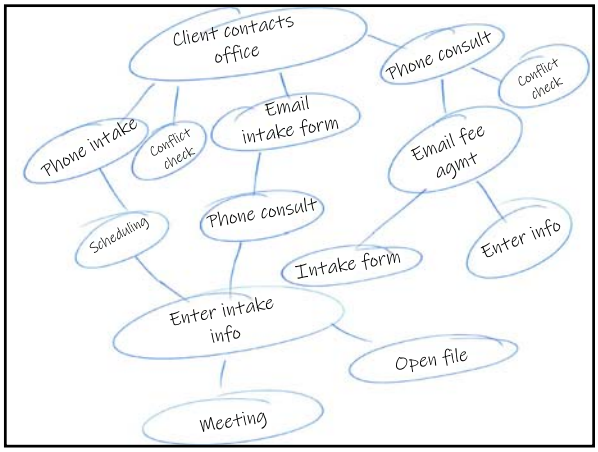
Engage and onboard

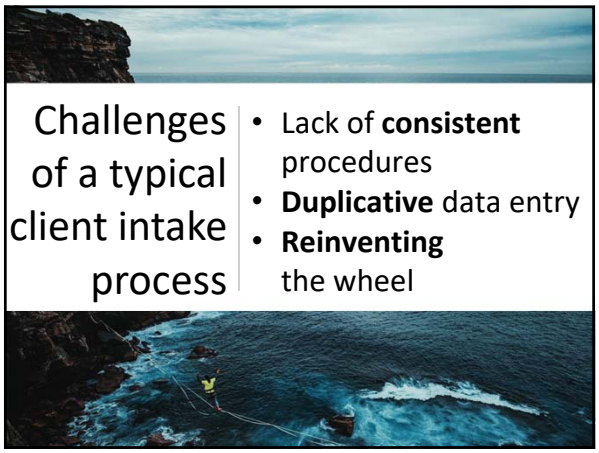
Open file



Challenges of a typical client intake process

- Lack of **consistent** procedures



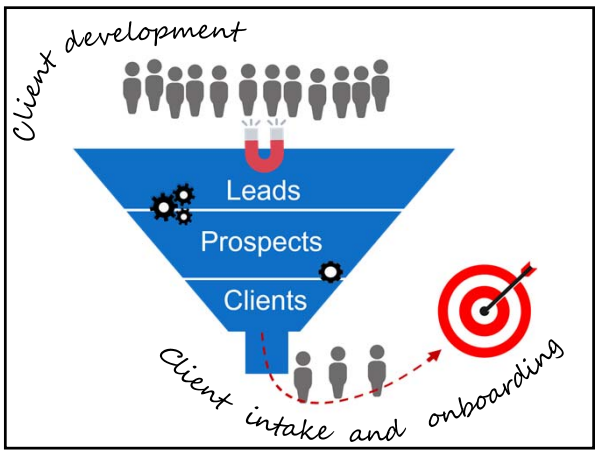

Challenges of a typical client intake process
• Lack of **consistent** procedures
• **Duplicative** data entry
• **Reinventing** the wheel

Why Automate?

Better Client Services
Improved client relations

SUI
SUI
GBR
GBR
BEL
Stay Competitive
Reduce overhead & cost

Business Development
Get more clients


Client development
Leads
Prospects
Clients
Client intake and onboarding

What an Automated Intake Process Looks Like to Clients

Web Applications

Online scheduling

calendly

Acuity SCHEDULING

ScheduleOnce

Fast
Convenient
Don't waste anyone's time

Web Applications

Online forms

Typeform | WUFOO | JotForm | Google Form

Lawyers don't have to input data
Clients feel like they told you everything

Web Applications

Electronic signature

DocuSign | HELLOSIGN a Dropbox Company | SignNow

Fast, secure, easy to execute forms
on mobile devices

Web Applications

Online payment

PayPal | stripe | Square | LawPay AN AFFINIPAY SOLUTION

Lawyers are promptly and reliably paid
Clients can easily pay from phone

Web Applications

Practice management software

actionstep · MyCase · SMOKEBALL · Clio · PRACTICEPANTHER · CosmoLex · zolaSUITE · rocket matter

Everything in one place
Accessible on mobile devices
Communicate and share documents via client portal

Web Applications

Other apps

Dropbox · Office 365 · G Suite

Productivity software
Cloud storage

Workflow Automation Tools

zapier	[1500+ apps]
IFTTT	[600+ apps]
tray.io	[400+ apps]
Power Automate	[100+ apps]

Automating client intake boils down to:

1. Making services available online
2. Connecting apps and services

Where to start?

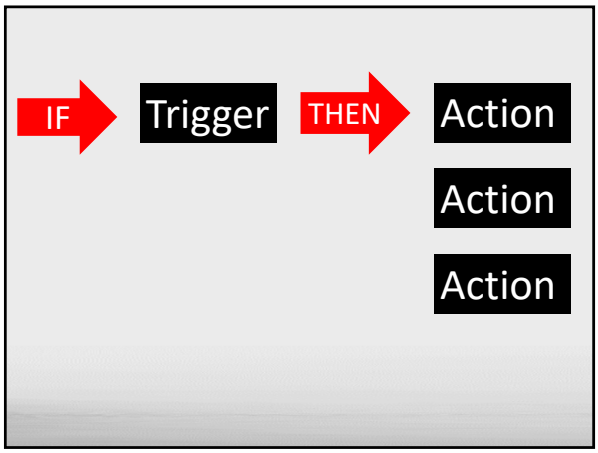
1. Write down steps of intake process
2. Decide what steps to automate
   - Online scheduling
   - Online forms
   - Electronic signing
   - Online payment
   - Automatic capture of intake data

3 steps to automate

Step 1 Select apps to connect

Step 2 Choose a **trigger** that sets workflow in motion

Step 3 Choose an **action** that results from the trigger



Make scheduling easy

Acuity SCHEDULING → zapier → Outlook

Trigger

Client schedules consultation online

Action

Appointment is scheduled in web-based calendar

Get paid when consults are booked

calendly → zapier → Square

Trigger

Client schedules consultation online

Action

Client is directed to online payment

Capture client information

Typeform | zapier → Clio

Trigger

Client completes intake form online

Action

New contact is created for that client

Putting it all together

Client schedules consultation online

calendly

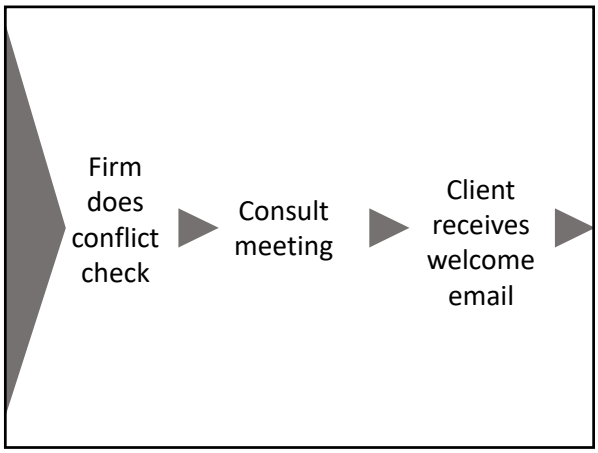
zap → Square

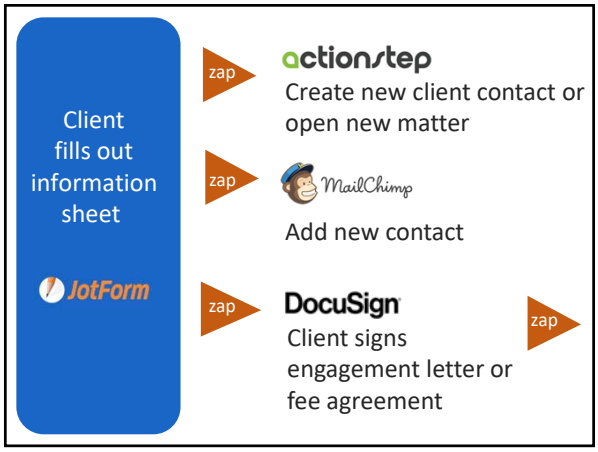
Client is directed to pay consult fee online

zap → Office 365

Appt. is scheduled in lawyer's calendar

→ Client and lawyer receive email re appt


Firm does conflict check
Consult meeting
Client receives welcome email


Client fills out information sheet
JotForm
zap
actionstep
Create new client contact or open new matter
zap
MailChimp
Add new contact
zap
DocuSign
Client signs engagement letter or fee agreement
zap

zap
stripe
Client pays retainer or flat fee

Two Conditions

1. All apps must be web-based
2. Apps must integrate with workflow automation tool

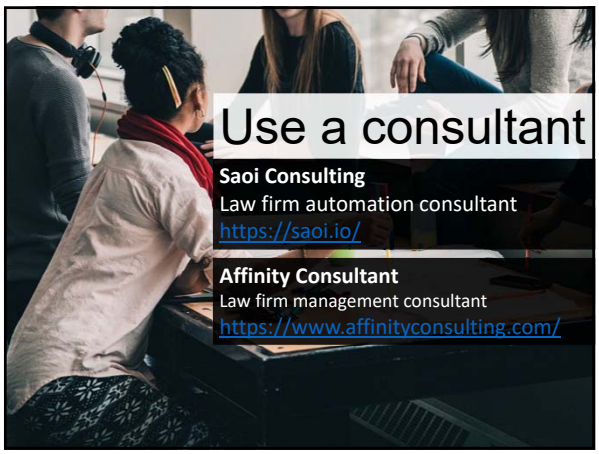
Try ***all-in-one*** client intake software

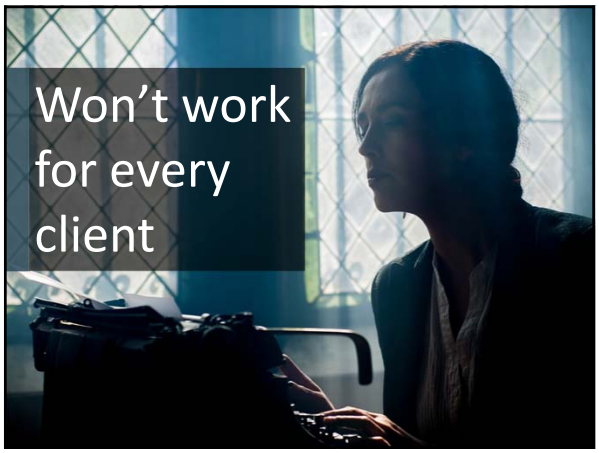
17hats

Intake123

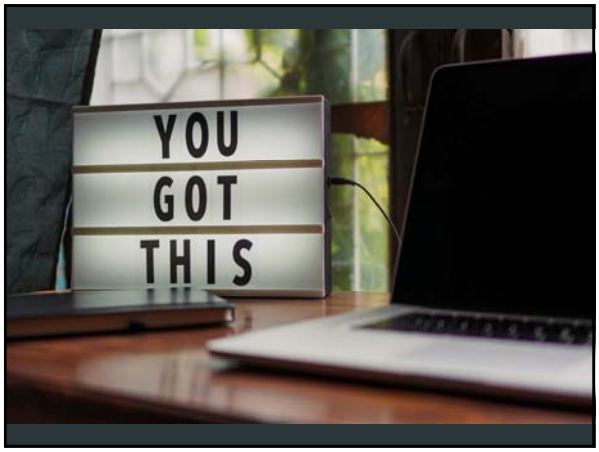
Lexicata by Clio

process.st




Won’t work for every client

Don’t stop with intake


YOU
GOT
THIS