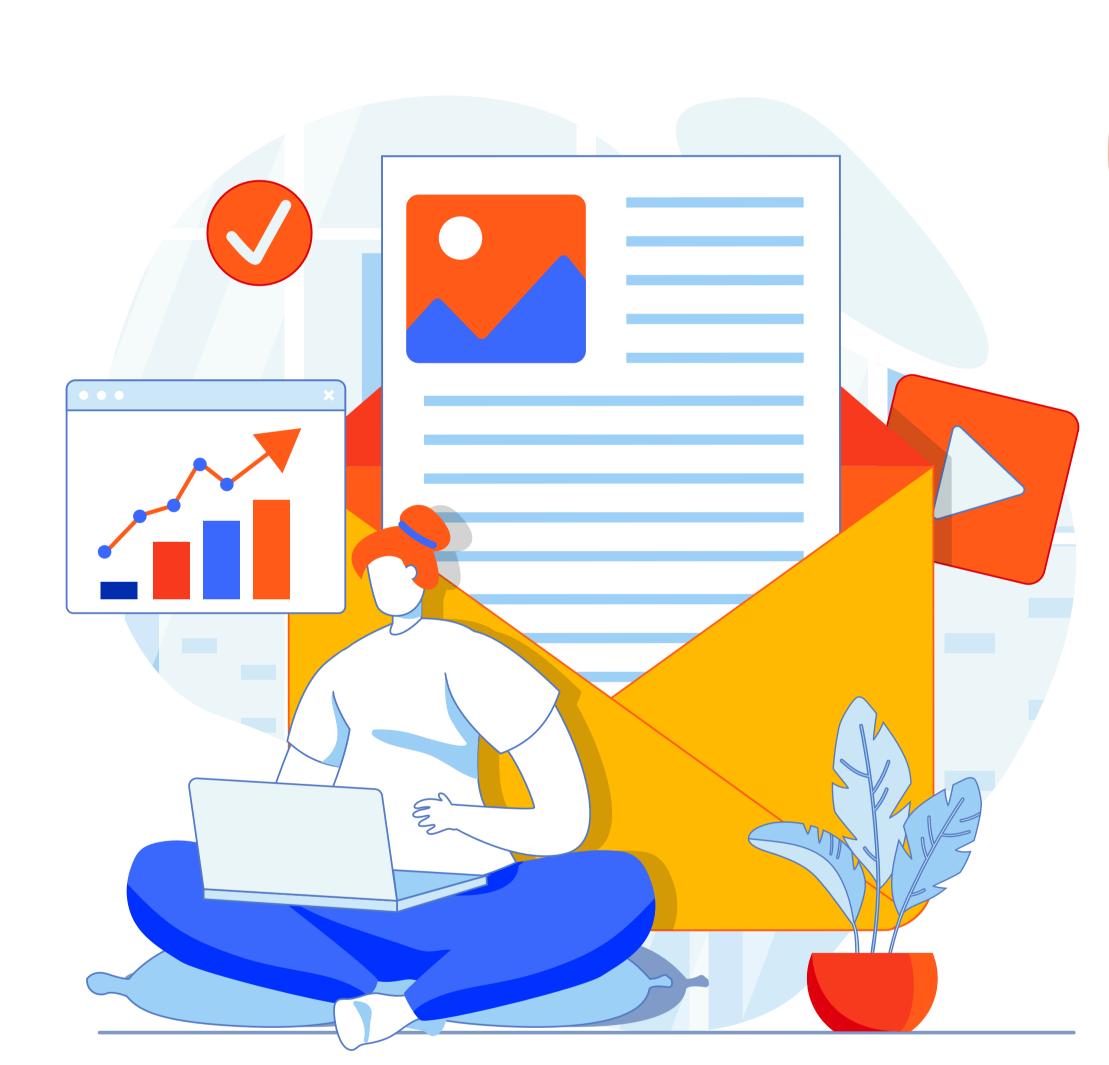
Six Essential Features in Your Legal CRM (and How to Use Them)

While your **legal practice management software** keeps the daily work of a law firm moving, **legal CRM** software makes it easier to bring in new clients, engage current clients, and increase your profits. But not all legal CRMs are created equal. Look for these six features when choosing a legal CRM—and put them to work for your law firm.





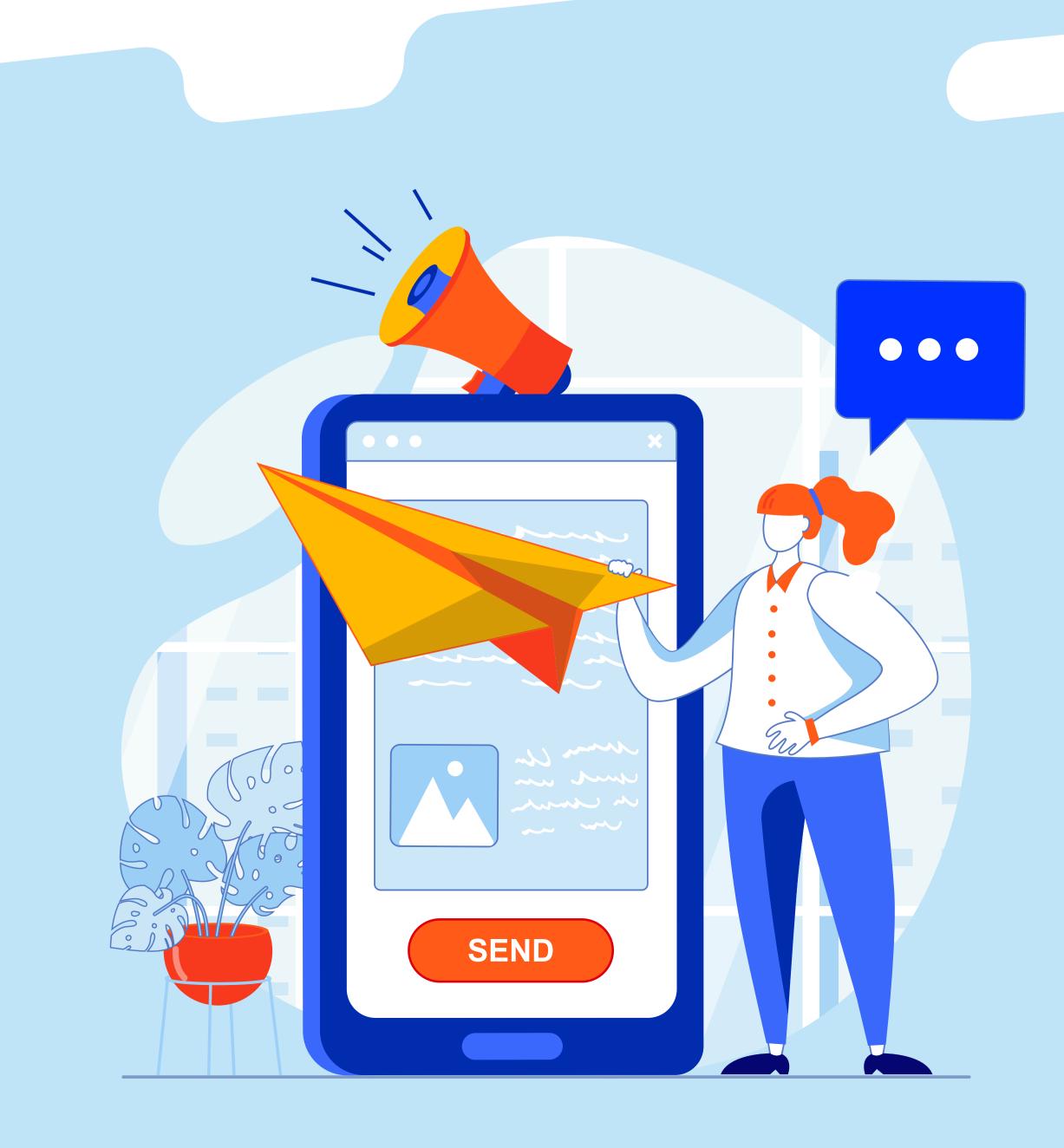
Automated email and text marketing

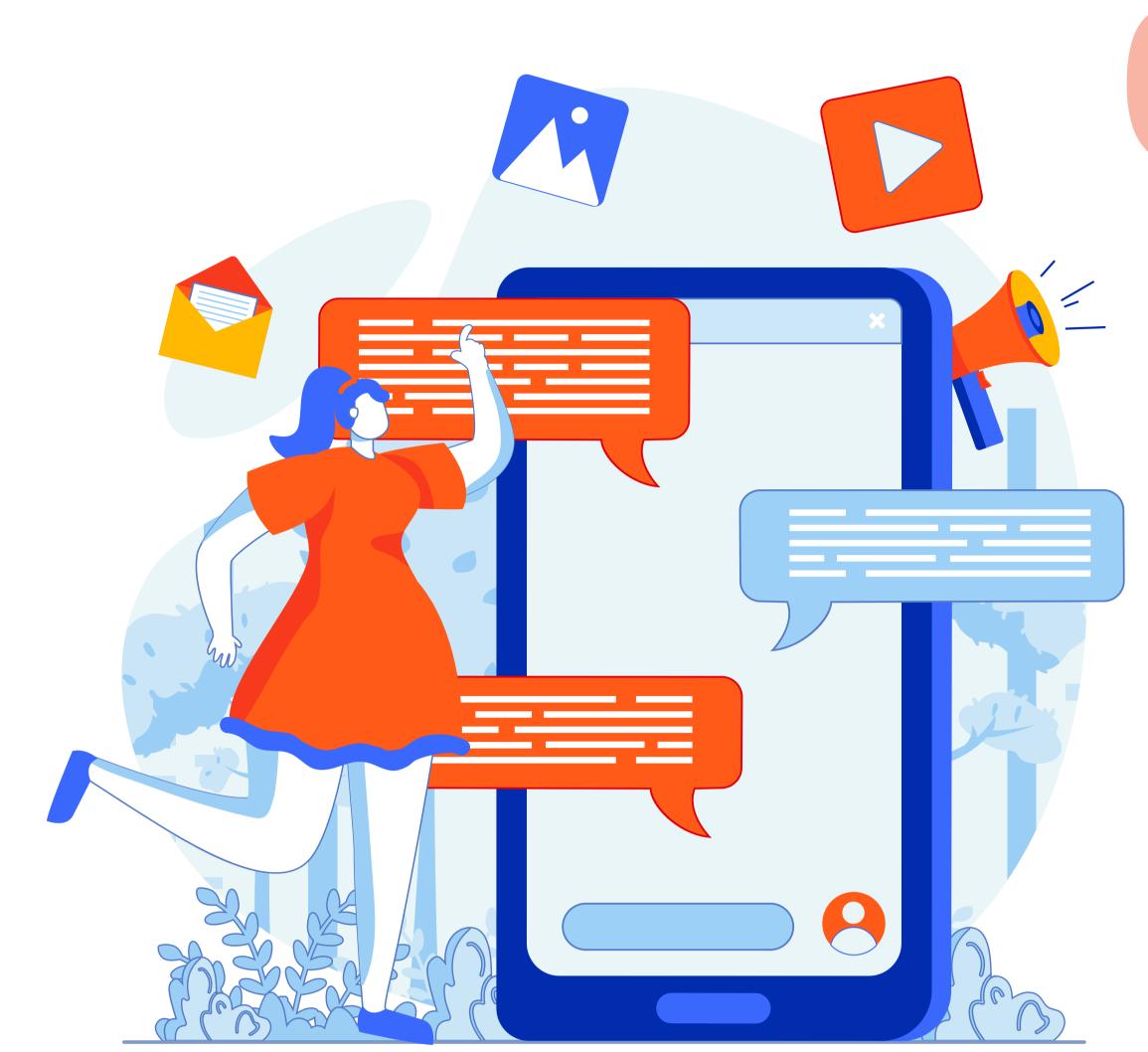
When you use a legal CRM's automated email and text marketing, you can create customized messaging that kickstarts client conversations and nurture them along your sales funnel. (And discourage them from moving on to another law firm.)

Automated marketing isn't only for new clients. Send established clients reminders for appointments, engage them with content marketing, and send review requests once you've concluded their matter.

One-click e-signature

When your legal CRM has a built-in e-signature, you can reclaim your billable hours, increase client convenience, and get documents signed. And even better, when your legal CRM is already part of your practice management software, signed documents get uploaded to client matters.





Text and video messaging

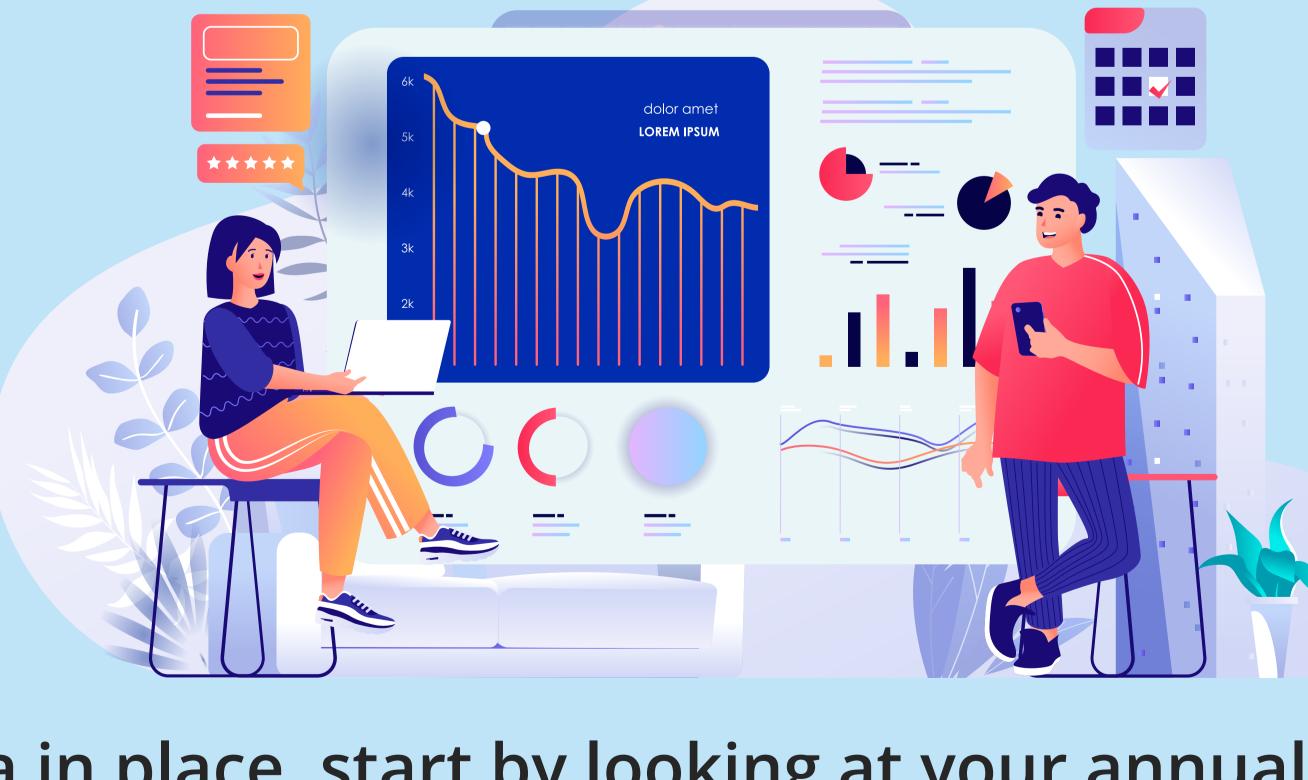
Communicating with leads via text and video builds relationships, no matter where a client is in your sales funnel. Implement these features to deliver personalized messaging about services and practice areas. What's more, because tools like CosmoLex let you send texts from a number that leads can respond to, these messages increase trust in your law firm.

Dashboard analytics

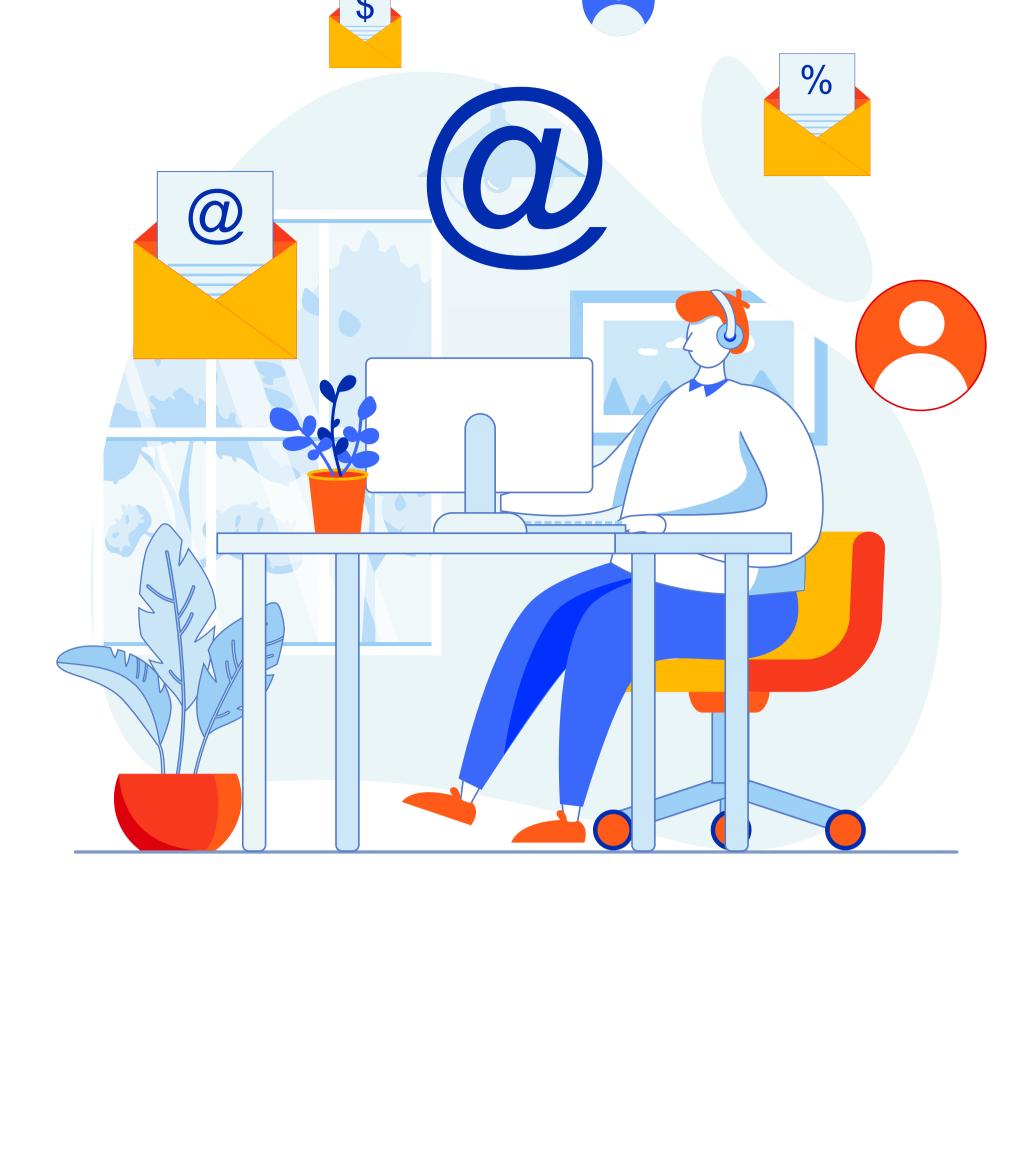
Centralize and customize critical marketing with your dashboard analytics. Your dashboard provides everything you need to see at a glance—no more deep dives for data points for information like:

- Case metrics
- Intake progress
- Lead engagementStaff productivity
- Marketing ROI
 And more
- And more

 If you don't have processes to review data in place, start by looking at your annual



or quarterly marketing strategy and see which data points in your dashboard can inform your KPIs. Prioritize reviewing them on a monthly or quarterly basis.



Marketing task management Timeliness is crucial for law firm productivity and

profitability. Your legal CRM should include task management features that keep your firm on track. Look for features that let you:

• Set up automated workflows

- Create internal alerts for legal staff
 Sync with calendars to create one so
- Sync with calendars to create one source of truth for your deadlines
- Connect client information collected from the legal CRM with your practice management software

Software support If you're implementing a legal CRM,

make sure you have the support you need for a smooth transition. Whether you're migrating data from a previous system or simply learning the ins and outs of a platform, software support reduces frustration and increases success.



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Meet CosmoLex's built-in legal CRM

CosmoLex CRM is an intuitive, legal-specific CRM designed to help you grow your profits by tracking prospective clients and keeping your current clients engaged and coming back for services. **Sign up for a demo** of CosmoLex CRM today.

