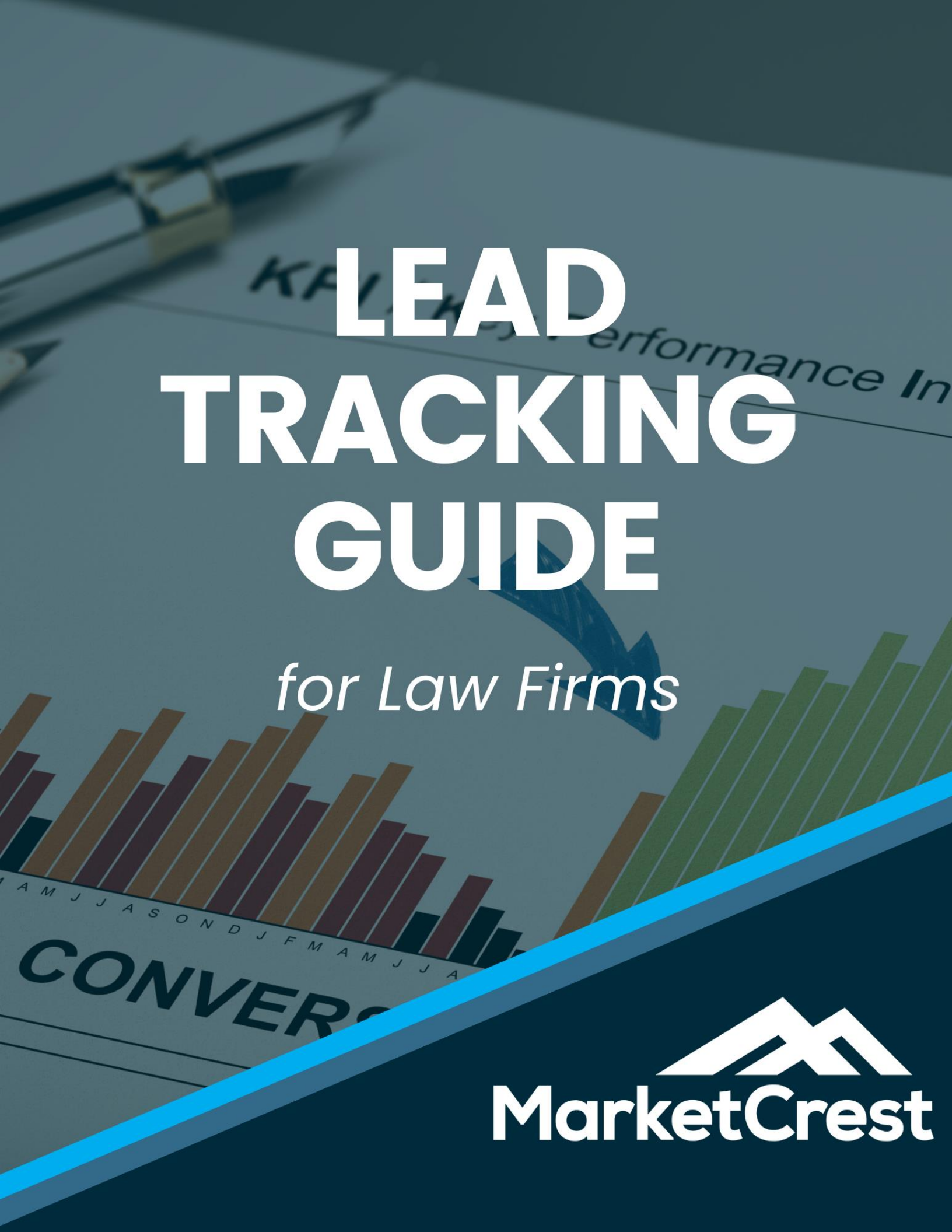

LEAD TRACKING GUIDE

for Law Firms

MarketCrest

The Guide to Tracking Your Law Firm's Leads, Appointments, & New Cases

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We are sharing our best practice for the law firm's logging inquiries (aka leads) that come from Potential New Clients (PNCs).

If someone calls because they are looking for an attorney and want to ask a question related to your law practice, a case, etc. – even if they decide not to schedule a consultation…that's a proper lead.

Even if they ask a "dumb" question, they successfully searched for a quality attorney, found you, and decided to reach out via website form or call directly to speak with someone.

Abandoned calls, sales calls, wrong numbers, and PNCs looking for an attorney who practices a different type of law are NOT official inquiries/leads.

Video Guide

If you would like to see a video guide walking you through the general features and instructions on how to use the Potential Clients Report, please click here to watch.

General Information

Note: It is highly recommended that you maintain a **clean, blank** copy of the Potential Clients Report Excel sheet to serve as a master template. Make a copy of this template each month, and label it according to the month and year in reference. (ex. 'Potential Clients Report - May 2024').

Any permanent changes you wish to make to the Potential Clients Report should be made on the master template, to ensure all future copies include the changes applied.

Software

Some firms prefer using software programs to perform their lead tracking (such as a CRM system), but we have found that these programs can overcomplicate the intake process and often require hours of training to utilize the software effectively (and this training must be done for any new members of your staff).

Due to these obstacles, we recommend that firms track leads using **Microsoft Excel**. Excel provides a user-friendly experience for less tech-savvy individuals while still allowing for powerful functions and insightful graphs to be built into each spreadsheet. This spreadsheet will use a combination of imported data (from your call tracking service and website form fills), as well as manual entry of data gathered before, during, and after the consultation itself.

As a bonus, if your firm is already using Microsoft Office, you enjoy the benefit of added savings by not paying for separate software to track your leads.

Sheet #1 | Potential Client Calls

This sheet is used to track data collected from your call-tracking service. At MarketCrest, we always set clients up with call tracking through CallRail, so this guide and its accompanying resource have been created for use with CallRail specifically.

Here are the sections and how to fill out each column within them:

Imported Data from CallRail

The first section of this sheet is where you will import data from your CallRail tracking. To correctly import this data, follow these instructions:

1. Visit CallRail.com and log in to your account.
2. Select **Activity** at the top of the page.
    a. This should redirect you to the **Call log** section by default, but you can also navigate to this page using the menu on the left of the page.
3. Just below the 'Call log' header at the top of the page is a section that reads "Displaying data from..." with a dropdown menu of options for date ranges.
    a. Your selection for this section will depend on the **frequency with which you plan to export this data from CallRail.**
        i. It is best practice to perform this as frequently as possible. As such, we recommend performing this **daily.**
    b. From the dropdown menu, select **Today (**if exporting at EOD) or **Yesterday** (if exported the morning of the following workday)
        i. If your firm performs this task the following morning, then you will need to select a different option following the weekends/holidays. In these cases, select **Custom** and then choose all dates that have passed since the last business day.
    c. If you are unable to import daily, then determine a frequency that best fits your firm's capacity.
4. Select the 'Edit Columns' button
    a. **NOTE:** The data points you choose are entirely up to your firm. However, selecting options that vary from the default selections we have built will require you to make changes to the spreadsheet columns.
    b. If you wish to use the default data points, then confirm that the following selections have been check-marked:
        i. Tracking Number
        ii. Source
        iii. Start Time
        iv. Duration
        v. Contact
        vi. Medium
5. Click the Apply button after selecting all desired data points.

6. Select the 'Export' button
    a. Set export format to 'Excel'
    b. Choose how you would like to receive the report
    c. We recommend the default setting, 'Browser, on this page'
7. Select 'Start Report'
    a. Open the Excel file once the download is complete
    b. Navigate to sheet #2, 'Calls'
    c. Highlight all the data, **excluding the titles of each column** (i.e. Call Status, Number Name, Tracking Number, etc.)
        i. The quickest way to do this is to click into any cell included in the data table, and use the following keyboard shortcuts:
            1. Windows: Ctrl + A to select all data; Ctrl + double click the Left mouse button on row 1 to deselect the row that contains the titles of each column.
            2. Mac: Cmd + A to select all data; Cmd + double click the Left mouse button on row 1 to deselect the row that contains the titles of each column.
        ii. Copy the highlighted data
8. Navigate to the **Potential Client Calls** sheet on the Potential Clients Report
9. Click into the first empty cell available in column A, 'Call Status'
10. Paste all data into this section

If performed correctly, all data should be filled into the sheet without any errors. If Excel warns that an error may occur if you proceed: cancel the action, review the previous instructions, and try again.

Pre-Consultation (Manual Data)

The second section of this sheet is for the manual entry of data collected during the call with the potential new client. Many of these columns utilize a List function that limit acceptable entries to a selection of choices accessed through a drop-down list.

These dropdown lists are accessed by selecting the arrow button that appears to the right of the cell (Fig 1).

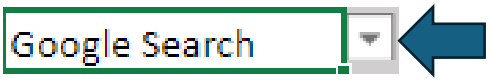

Figure 1. Accessing dropdown lists.

- (See 'Tool Settings' section of these instructions for information on adding to/changing the choices in these dropdown lists).

During the intake call, PNCs should be asked questions to gather the following data **(NOTE: columns denoted with an (*) utilize a dropdown list)**:

1. *How did the PNC hear about our firm?*
2. Referral Name (if applicable)
    a. This cell will be greyed out unless "How did the PNC hear about our firm" is set to 'Referral'

3. *PNC Preferred Language*

Following the intake call, the following data should be completed regarding the outcome of the call:

1. *Pre-consultation Outcome*
    a. This dropdown includes a variety of possible outcomes regarding whether the client booked a consultation or not.
2. APPT Date
    a. Date of consultation (if applicable)
3. Recorded by (Initials)
    a. Initials of the staff member who performed the call and input data into the Potential Clients Report.

Post-Consultation (Manual Data)

The final section of data on the **Potential Client Calls** sheet should be completed **after the consultation** (if applicable). (**NOTE:** All these columns utilize a dropdown list for data entry.)

1. PNC Attendance
    a. Showed
    b. No Showed
2. Could we help the PNC? (blacked out if 'PNC Attendance' = No Showed)
    a. Yes
    b. No
    c. Undecided
3. Did the PNC hire? (blacked out if 'PNC Attendance' = No Showed)
    a. Yes
    b. No
    c. Pending

Graphs

To the right of the data table are graphs that provide visual insights regarding the data gathered in the **Potential Client Calls** sheet.

NOTE: These graphs update automatically as new data is entered into the 'Pre-Consultation' section of the sheet, so they do not need to be edited unless data points are changed from the default provided.

- (See the 'Tool Settings' section to learn more about selecting different data for these graphs).

Sheet #2 | Potential Client Form Fills

This sheet is used to track data collected from your website form fills. At MarketCrest, we generally build our websites on WordPress using the Elementor Pro plugin, so these instructions have been created for use with Elementor Pro specifically.

Here are the sections and how to fill out each column within them:

Imported Data from Website Form Fills

NOTE: Data collected from form fills can vary greatly, depending on the form fill plugin used and the type of information you request in the form itself.

Due to this variation, your form fill exports may look different than the ones covered in these instructions, and it may be necessary to add new columns or reorder/remove ones that are currently included in the base template of **Potential Client Form Fills**, to make importing data into the spreadsheet as seamless as possible. The following instructions will proceed using the basic data included with the **Potential Client Form Fills** but can be applied to any changes you may make.

The first section of this sheet is where you will import data from your CallRail tracking. To correctly import this data, follow these instructions:

1. Navigate to the admin console of your website by searching *yourdomain/***wp-admin**
    a. Ex. www.marketcrest.com/wp-admin
2. Login to your website
3. Using the menu on the left of the screen, navigate to the plugin that your website uses for form fills. If MarketCrest built your website, it will likely be one of the following:
    a. Elementor Forms
    b. Ninja Forms

Exporting from Elementor Forms

1. Select the Elementor menu item
2. Under Elementor, select 'Submissions'
3. Change 'All Forms' to the correct form (if applicable)
4. Change 'All Time' to the correct date range (depending on the frequency this is performed)
5. Click 'Export All to CSV'
    a. Open the downloaded .csv file
    b. Highlight all applicable data
        i. If you have made no changes to the content or order of the data columns, this will be all data from 'First Name' to 'Message' (**excluding the title of the columns)**
    c. While data is still highlighted, hold the Ctrl key (on Windows) of the Command key (on Mac) and highlight all entries under the 'Created At' column
    d. Copy this data from the Elementor export
6. Navigate to the current month's Potential Clients Report -> Potential Client Form Fill

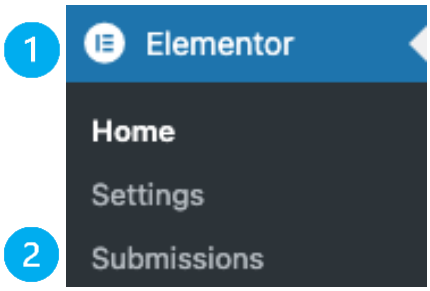

Figure 2. Locating Elementor plugin.

a. Click into the first empty cell in column A
    i. 'First Name' column if using default layout.
b. Paste data

If done correctly, all columns within the **Imported Data from Website Form Fills** should be filled. If Excel gives a warning, review the steps above and attempt again.

Exporting from Ninja Forms

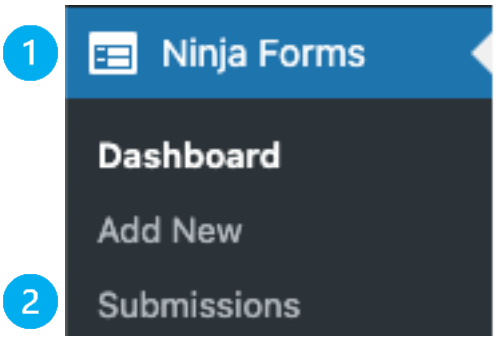

Figure 3. Locating Ninja Forms plugin.

1. Select the Ninja Forms menu item
2. Under Ninja Forms, select 'Submissions'
3. On the Submissions page, select the 'Bulk Form Exports' button
    a. Select Dates of form fill submissions you would like to export
    b. Select which form you would like to export submissions from (likely titled "Contact" or something similar.
        i. **NOTE:** If you select the form BEFORE selecting Dates, you will be unable to click the Export button
        ii. To fix this, simply deselect and reselect the desired form again.
4. Click the Export button
5. Open the .csv file that is downloaded
    a. Copy all applicable data from this file
        i. **NOTE:** To simplify this process, the columns in your **Potential Client Form Fills** sheet should mirror the columns from your form fills export OR you should only copy the applicable data from the export file to paste into the Clients Report
6. Navigate to the month's **Potential Clients Report** -> **Potential Client Form Fills** sheet
    a. Click into the first empty cell in column A
    b. Paste data

If done correctly, all columns within the **Imported Data from Website Form Fills** should be filled. If Excel gives a warning, review the steps above and attempt again.

Graphs

To the right of the data table are graphs that provide visual insights regarding the data gathered in the **Potential Client Form Fills**.

NOTE: These graphs update automatically as new data is entered into the 'Pre-Consultation' section of the sheet, so they do not need to be edited unless data points are changed from the default provided.

- (See the **Tool Settings** section to learn more about selecting different data for these graphs).

Sheet #3 | Totals Dashboard

The **Totals Dashboard** provides visual insights into your **overall intake statistics.** This dashboard includes a combination of the data collected on the **Potential Client Calls** and **Potential Client Form Fills** sheets, providing an overview of your total performance regarding your intake process.

Sheet #4 | Tool Settings

Note: All data on this page is automatically generated based on the data gathered on the "Potential Client Calls" and "Potential Client Form Fills" sheets. Manually entering data into cells on this page, or any other area not designated for manual data entry, will break formulas and may break graphs included throughout this spreadsheet.

The **Tool Settings** sheet is utilized for two primary tasks:

1. All formulas, graphs, and functions used throughout the **Potential Clients Report** pull data from this sheet.
    a. This means that if you wish to adjust dropdown list content, data utilized in graphs, or formulas used throughout the spreadsheet, these actions will be performed here. Instructions on how to perform these actions can be found in the **Edit Tool Settings** section below.
2. Overview of **number values** of data throughout the spreadsheet
    a. While graphs provide quick visuals, it is also valuable to be able to quickly see exact numerical statistics.
    b. These statistics are also broken down between Calls, Form Fills, and Totals

Edit Tool Settings

While the template of the Potential Clients Report already includes the basic information we recommend gathering during the intake process, it is not a one-size-fits-all tool. Due to this, it may be necessary to edit your Potential Clients Report, depending on the data your firm would like to gather regarding your own intake process. This section will outline how to make some of these edits.

Dropdown Lists

Dropdown lists are a basic but powerful tool. It allows you to create a list of “acceptable” responses within a given section AND prevents any variation between users who are completing these sections. Here is how to create/adjust a dropdown list:

1. On the **Tool Settings** sheet, create a list of acceptable responses that you would like to be a choice within the dropdown list.
    a. **NOTE:** This list must be in the **same column (Fig. 4)**



2. Navigate to the sheet and column where you would like to insert your dropdown list.
    a. Ex. If you wanted to make changes to the dropdown regarding how clients heard about your firm via phone calls, you would navigate to the "How did PNC hear about Firm" column on the **Potential Client Calls** sheet
3. Highlight the column/cells you would like to insert the dropdown list.
    a. The easiest way to do this is to click the **letter about the column** to highlight the entire column
    b. Then deselect the first two rows of that column, as they include the section and column titles.
        i. To deselect cells:
            1. Windows: **While holding the CTRL key**, click on the cells you would like to deselect
            2. Mac: **While holding the COMMAND key**, click on the cells you would like to deselect
    c. All the cells should now be highlights EXCEPT for the top two cells in the column.
4. Navigate to the **Data** section in the Navigation Ribbon **(Fig. 6)**
    a. Select the **Data Validation** button (not the dropdown arrow) **(Fig. 7)**
    b. A data validation menu will pop up **(Fig. 8)**
5. On the Data Validation menu
    a. Allow:
        i. Change from Any Value to List
    b. Source:
        i. Click the Red Arrow icon to the very right of the source entry box.
            1. This will allow you to highlight data with your mouse.
        ii. Navigate to the **Tool Settings** sheet, then highlight the list of entries you created in Step 1.
        iii. Press Enter.
    c. Click green OK button after selecting desired source data.
6. Your dropdown list has now been created/updated with your entries.

Figure 4. Creating entries for dropdown list.

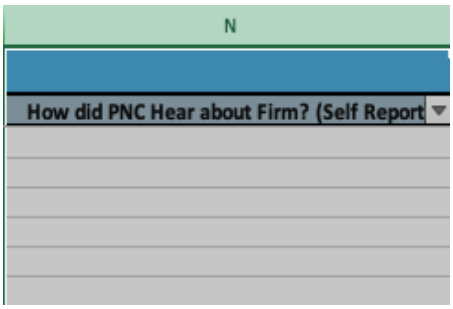

Figure 5. Highlighting entire column.

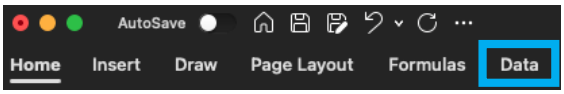

Figure 6. Locating Data tab on Excel.

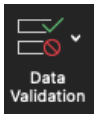

Figure 7. Data Validation option.

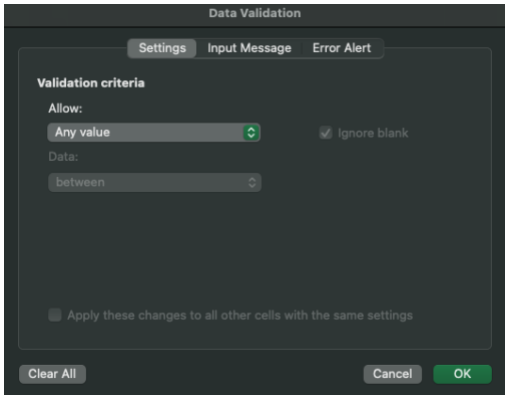

Figure 8. Data validation menu.

Changing Source Data for Graphs

It may also be necessary to update the graphs utilized throughout this spreadsheet. To do so, follow these instructions:

Updating Graphs

1. Navigate to the graph you wish to update.
2. Right click the graph, then “Select Data”
3. Source:
    a. Select the icon with the Red Arrow, allowing you to highlight data with your mouse.
    b. Navigate to **Tool Settings** sheet
    c. Highlight the data you would like included in the graph
    d. Press Enter
4. Select green OK button to update graph.

Creating Graphs

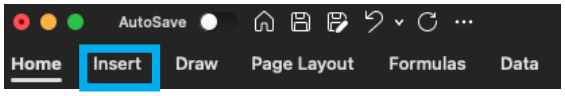

Figure 9. Insert tab on Excel's ribbon.

1. Navigate to **Tool Settings** sheet
2. Highlight the data you would like to turn into a graph
3. With the data still highlighted, select **Insert** on Excel’s navigation ribbon **(Fig. 9)**
4. Select the type of graph you would like to use **(Fig. 10)**
    a. Alternatively, use the Recommended Charts section to view Excel’s chart recommendations based on the data you have highlighted.
5. Basic Chart will be created
    a. Right click chart, select Cut
    b. Navigate to desired sheet you wish to place the chart
    c. Paste the chart
    d. Edit size, title, axis, colors, etc. as you see fit.



Figure 10. Select the chart type for your

Sheet # 5 | Helpful Excel Shortcuts

This final sheet simply contains a collection of useful keyboard shortcuts to help navigating and using Excel. This sheet includes the shortcut function as well as both the Windows and Mac keyboard shortcuts to achieve the function. It is highly recommended to familiarize yourself with the shortcuts pertaining the functions that you will be using often within this spreadsheet, such as those found in the ‘General’ and ‘Selection’ sections.