Automating Your Practice on the Cheap

One of the things that really irritates me is when a client calls, they say, you know, I saw you two, three months ago, and you promise me drafts of the documents, and I haven't heard anything, we look for the file, and it's under somebody's pile on their desk, and the file wasn't opened yet, or my dictation hasn't been typed, or so on and so forth. I'm sure that's very, very frustrating for you as well.

So this is something that you want to minimize, and the way to minimize it as your practice grows, is to use technology. There's a lot of good technology out there that is very low cost and easy to use, easy to integrate into your practice. I mentioned some in the email that accompanies this podcast episode, and I urge you to try some of those software programs that I discuss. If you don't, you're going to be increasingly frustrated.

As your practice grows, these sorts of things will happen more often, not less often. How about when the client doesn't come to their appointment? Maybe your receptionist has the task of calling the client and asking them to make sure that they come to their appointment at the scheduled time. Most of us have our appointments from everything from our hair salons, to our dentists to our doctors, you get the emails, or the text messages that say, "Hey, remember, you have appointment tomorrow at 10am."

Those are very easy to implement programs that are very low cost and worth your while to investigate. Now, the more of these programs you use, the more efficient your office will become. I've noticed that estate planning attorneys in general, don't seem to use technology. Yeah, sure they use Microsoft Office, they might use a CRM; like Time Matters, we used for many years before we switched over to Microsoft Dynamics. Our beef with Time Matters was it didn't have API that talked to all the other programs we're using.

Attorneys will use documents, software, drafting programs, those are all what I would call backstage programs. What about your front stage where you're interacting with all of your clients? How about your web? Do you have something that will capture somebody who's looking at your website, and then ask them for their email address, and then you can send them information that's relevant to what they were looking at.

These are all very, very important functions. Now if you don't have the time to do these things, and most attorneys don't, you can either hire somebody to do it or look on a website like Upworks.com where you can hire somebody, they don't have to be next door in your community anymore. They can be someone working remotely. Just make sure that you've vetted them that you've looked at their online reviews and such.

If you're not using technology to your highest and best use, remember to do so or try to look into it. At our Practice Xcelerator event October 27 and October 28 in Captiva Florida at the beautiful South Seas Resort these this is another aspect of what you'll learn the technology we use, how we use it will show you how to implement these items into your practice.

To your bigger future, this is Craig Hersch.