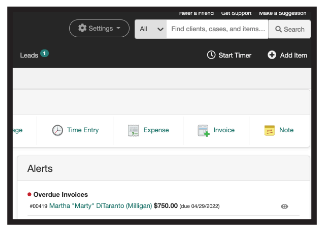
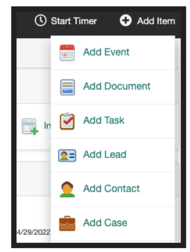
How to Take a Lead

This is just a quick instructional guide on taking a lead. When someone calls in for the first time to the firm we add them as a lead so they can be effectively tracked through the onboarding process and so that we can accurately predict firm income. Follow the steps below to see how to keep that process ticking along! You can also watch this guide here: *joneslawcolorado.com/dashboard*

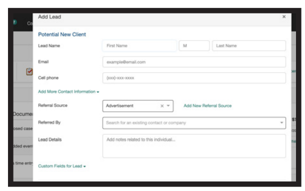
Steps to Follow

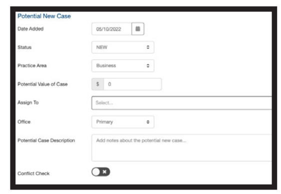
- Navigate to the quick actions menu in the top right and click add item. Then click add lead.



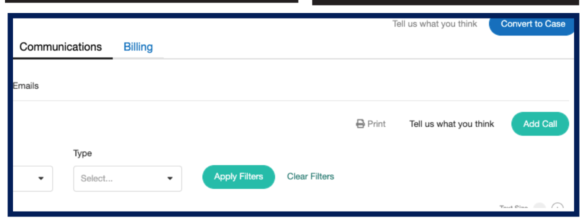


- Fill out the lead with all details possible & write a complete summary in the case description box.

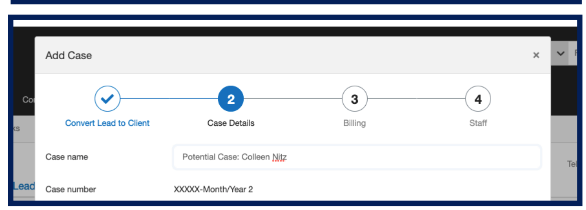




- Ensure you also save the phone call you had & their first event on their profile.



- When you convert the lead to a case don't forget to change the name of the lead & the description.



- That's that! Good job!

Concluding Thoughts

This is a pretty high level view of leads. For different practice areas you'll want to ensure specialized details are included, like case numbers & county for criminal cases, the county of the deceased's death & of their property for probates, and the names of all parties to a potential divorce. Often there will be an intake form that the client can fill out themselves that you could send to them after the call or that you could open up while you have them on the phone and fill out right there so lean on those too!