The ultimate guide to personal injury practice management

Hi There,

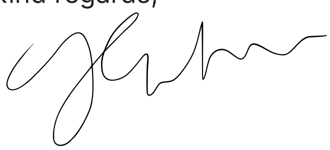
We founded CASEpeer with the vision that every personal injury law firm can maximize its human potential, and every injured client can receive exceptional care and the best possible results.

At CASEpeer, we understand the complexities that go into managing a personal injury practice. It's our goal to provide solutions that improve processes, streamline operations, and give visibility for better outcomes. We also know your clients are the forefront of your business and that providing an exceptional client experience is imperative. When you enhance the customer journey from intake to settlement, establish efficient workflows for your team, and optimize your business management with meaningful analytics, you will set your law firm up for long-term success.

CASEpeer is here to help every step of the way. Our practice management software solution is designed for the specific needs of personal injury firms. With over 50 turnkey reports, CASEpeer is a purpose-built business management platform committed to powering your practice.

May you find this guide helpful in your pursuit of managing a profitable law firm. My team and I are deeply committed to your success.

Kind regards,



Gabriela Cubeiro
CEO and Co-Founder

CASEpeer

How to manage a personal injury firm

Unlike most areas of practice, personal injury attorneys and firms invest time and money into their cases with no guarantee of profit.

Whether you're a large personal injury law firm or hoping to become one, you need the best practices and tools to sustain profitability and foster productivity.

Everyone deserves a healthy work-life blend and time for personal development, and you should be able to run a personal injury law firm without burning yourself (or your employees) out.

If you want to practice personal injury law as a solo practitioner or multi-attorney firm, how you manage your law firm can mean the difference between collecting money for the work you performed or losing a case.

Streamlining the operations is an important step forward for law firms, giving you both more time to focus on what truly matters in life: securing better outcomes for your clients and staying profitable.

Operations management is crucial for personal injury law firms. Process improvements and streamlined workflows bring more organization, efficiency, and accuracy to your cases – all of which directly impact your bottom line.

As balancing your firm's different stakeholders and cases becomes harder, can you confidently say you're running a tight ship?

CASEpeer helps law firms nationwide be more powerful and proactive.

81%

Happier clients
Improve client communication with texting and client portal

61%

Higher revenue
Optimize settlement negotiations and retain more clients

94%

Increased productivity
Do more in a day with template generation and other time-saving tools

90%

Easy & intuitive to learn
According to over 90% of users who have switched to CASEpeer

Work confidently and effectively with CASEpeer, a cloud-based case management solution tailored for personal injury law firms. With a hub of operational tools and data accessible anywhere, anytime, you can execute on outcomes like never before. CASEpeer is your personal injury firm's blueprint for success.

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Three elements of a successful personal injury firm

For firms trying to thrive or grow, success comes down to efficient business practices and being an effective attorney.

Every attorney who wants to start their firm must establish a foundation of sound, scalable business practices. We've talked to several established law firms and identified habits they have in common. Putting these practices in place will ensure your practice is on the path to success.

Apply these strategies to avoid costly mistakes and get your law firm on the path to profit.

01

Strong client relationships

All attorneys know the value of a client referral. Some firms lose sight that law is a service industry – but successful firms never do. Satisfied clients will refer you to family and friends, which in turn help grow your business and improve your bottom line. With online reviews, happy clients and referrals are more important than ever.

2021 research shows that 59% of individuals seeking a lawyer sought a referral, with 32% from friends and family and referrals from a lawyer at 16%. Focusing on generating referrals is a critical part of attracting new clients, and you should also focus on other lead generation tactics (like nurture and paid ads).

Highly effective law firms understand the importance of outstanding customer service and develop strong relationships during and after cases to capitalize on connections. Your firm can approach this in many ways, which comes down to providing an exceptional client experience.

Attorney referral agreements and services are an interesting concept that must be treated with caution. Make sure your firm is aligning with the American Bar Association (ABA) Model Rules in section 7.2:

- No paying for referrals (exception token gifts).
- No exclusive reciprocal referral agreements (any referral agreements must be disclosed to the client).
- Referral services and lead generation services are allowed, but they cannot vouch for a lawyer's quality. Additionally, the services you're advertising can't be misleading.

Intake Strategies

How many times has your law firm let a good prospect slip through the cracks? Whether you're answering calls or you've outsourced that to an intake team, it's important to establish strong sales protocols.

Retaining and following up with leads is just as important as acquiring them in the first place. Successful firms put systems in place to ensure they're not overlooking any potential clients. An organized case management software helps attorneys and staff track client records more efficiently and in more detail. When a virtual file is opened, every staff member on a case can quickly get up to date. If a client calls, there is no need to search for the paper file or yell down the hall to ask a question – all the case information is accessible with just a few clicks.

Not only can legal practice management technology help you maintain more organized client records, but some practice management solutions also offer in-platform client communication. That way, you don't have to text or call clients and prospects from your actual phone. It also gives you visibility into if your attorneys and staff are reaching out to clients with case updates and helps you track accountability across the teams.

By combining the right intake and communications strategies, you can successfully maintain and build upon your client relationships. From sending email nurture to personalized notes, you'll be investing in your long-term success.

Now, let's take a look at the second element of your personal injury's success: your online presence.

02
Your online presence

It's important to note that referrals aren't the only way clients find a lawyer. In fact, 57% looked for a lawyer on their own through methods like online search engines, visiting a lawyer's website, and online reviews.

Third-Party Platforms and Profiles

Your firm's marketing strategies and your online presence go hand-in-hand. These brand touchpoints must be consistent and accurate, from a user-friendly, well-designed website to third-party reviews, and your Google my business profile.

- Keep consistent, uniform language and branding across your online presence.
- List what types of cases you handle.
- Describe the legal processes and what to expect.
- Provide cost estimates for different services.
- Include updated contact information and website addresses.
- Encourage clients to leave reviews on your third-party profiles.

Your Firm's Website

You only have a few seconds to capture your audience's attention, and you should do this through both visual and written elements. How and where your personal injury firm shows up on search engines can help or hurt your brand visibility, accessibility, and growth.

To build a high-impact website that promotes conversions, you need to implement a focus on user experience and how to build trust with your audience.

User Experience (UX)

UX directly impacts how long website visitors stay on your website, click-through rates (CTR), and more. To do this, we suggest you:

- Showcase your services and programs easily on your menu. If your site is easy to navigate, your audience will explore your services and better understand what services you offer (and how these benefit your clients).
- Include contact information on your home page or menu. Provide multiple calls to action (CTAs) like 'Get in touch,' 'Contact us,' or 'Learn more' that allow your viewers to get in touch by phone, email, chatbots, and forms across your web pages.
- Don't bury your audience in legal jargon like 'Mediation,' 'Litigation,' or 'Reconciliation.' How you communicate with your clients and prospects should be straight to the point, concise, and impactful. Make sure to communicate about the benefits and outcomes of your services, not just the technical processes behind them.
- Explain what your clients will experience from beginning to end. Offering an online client portal and intake for legal services can differentiate you from competitors in your space. In addition, providing insight into deadlines and important events can help everyone feel prepared and supported.
- Use consistent branding elements across your website. Sans-serif font is best for digital text, and serif is best for paper. Use a cohesive and relevant color scheme and make sure navigation is intuitive.
- Make sure your web pages are optimized for both mobile and desktop. Most website hosting platforms should have this available but often require additional coding and testing.

Building Trust and Authority

More than user experience, you need to build a relationship and authority with your audience through content like visuals, social proof, metrics, and messaging. To accomplish this, consider:

- Using quotes from past or current clients on your website as social proof.
- Investing in content marketing for your audience (such as blogs, ebooks, and videos) to showcase your firm as a knowledgeable, trustworthy resource while educating your prospects around their primary areas of concern.
- Displaying results your firm has driven for others like certifications, cases won, clients served, and more.
- Including an 'About' page that highlights your attorneys, their expertise, and your overall firm's missions.
- Using strong visuals within your branding style guide and field to communicate nonverbally. Photo websites like Unsplash or Pexels are great for finding high-quality, non-stock images to use.
- Implement Search Engine Optimization (SEO) best practices to your webpage copy, URL structure, and code.
- Introduce a content marketing strategy to your website to answer important questions and address challenges you think your prospects might be experiencing.

Depending on your personal injury law firm's website platform of choice, these best practices and tricks should be available. Content management systems like Hubspot, Squarespace, and Wix are user-friendly and easy to optimize for search engines and UX.

To address these two buckets, talk to your IT and marketing teams, do your research to find out where you stand, or consider outsourcing to a third-party service provider that can tackle these topics.

03

Operational processes and tools

The most forward-thinking law firms embrace technology. They understand that legal tech is vital for staying current in an increasingly competitive space and a quickly evolving work environment.

The right case management software improves customer service, intake, security, collaboration, and more. Although we are a software company, we always recommend attorneys do their research and ensure everyone ends up with the best solution for their needs.

At the core, your personal injury firm needs a handful of tools in place:

- Google search console (free) and Google Analytics (free)
- Website builder and content management system (CMS). Given your resources, platforms like WordPress, Hubspot, or Squarespace offer different pricing tiers and development options.
- SEO tools. SEMrush, MOZ, and Ahrefs are popular paid SEO tools. For a free SEO tool, check out Neil Patel's keyword research tool.
- Email marketing platform. You can use and integrate a third-party email marketing platform like Mailchimp if your website platform doesn't include email marketing functionality. If it does, you should have access to an integrated built-in email marketing platform.
- Case management or practice management software. If your firm is operating on a paper-based system, it's time to change. Most case management platforms are now cloud-based and offered in the Software-as-a-Service model so that you can access your data anywhere, any time.
- VOIP phone services. A voice-over-internet protocol (VOIP) tool allows your lawyers and assistants to answer calls by remotely forwarding calls made to your business line. Some also offer live chat options, which help you better serve your clients.
- Customer Relationship Management platform (CRM). If your case management tool doesn't include a CRM, you need one centralized, updated database to manage all client contact information.

The right legal technology stack can increase efficiency, improve organization, and establish accountability at any law firm.

Accelerate Training Processes

Practice management software with workflow automation helps law firms define routine processes. For example, a firm can automatically assign tasks to the attorney to welcome the client and the legal assistant to order ambulance and emergency room medical records with a newly retained personal injury client.

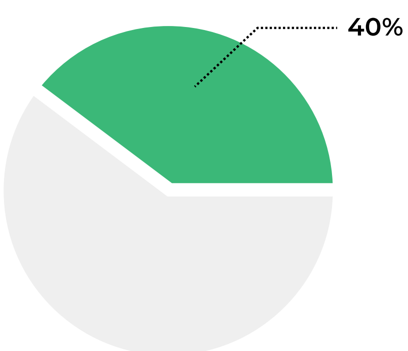
Task workflows are essential for law firms of all sizes. They establish consistency across teams and take the guesswork out of training new hires. Remember, the more intuitive the case management software, the quicker employees can get up to speed.

Lower Your Insurance Costs

Nearly 40% of legal malpractice suits are due to administrative errors such as calendaring mistakes. Practice management solutions can help attorneys keep track of statutes, litigation deadlines, and more. Not surprisingly, 40% of legal malpractice suits result from administrative errors such as calendaring mistakes.

Malpractice insurance companies know this, and many will give law firms discounts if they have this technology. Other features your insurance may discount include automated statute reminders and conflict checkers.

Percentage of legal malpractice due to administrative errors



Elements of a high-performing personal injury law firm

Modern advances in data analytics have allowed thousands of businesses to gain clarity into their future.

Imagine the power of using your law firm's historical data to know where your practice will be a month, a year, or a decade from now.

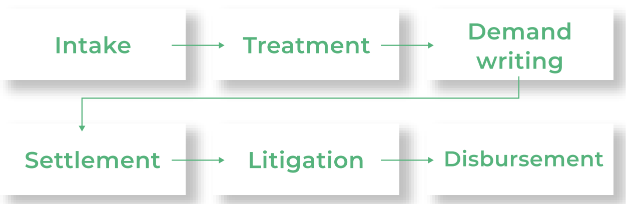
It's no secret that personal injury attorneys and staff are busy. Still, you can increase the efficiency of your team and free up valuable time.

Although you can achieve increased productivity without it, legal case management software will help make your short- and long-term goals easier to reach.

01 Establishing productive workflows

Workflows naturally follow task management. Building efficient workflows will not only help save time and money for your firm, most importantly, but they will also ensure that nothing falls through the cracks.

Take time to write down a series of tasks each case should go through. Typical stages for a personal injury case include intake, treatment, demand writing, settlement, litigation, and lien negotiations. You might need a few different steps based on case type.



Work with your paralegals, assistants, and attorneys to create these tasks. This collaborative approach will increase buy-in by your staff and ensure your workflows are comprehensive.

Creating workflows or task checklists will not only save your firm time but will also reduce redundancies, improve training processes, and help avoid malpractice claims. Legal case management software with task workflow management tools can help automate this process for your personal injury firm.

Creating Documents

One of the most popular forms of process automation is document generation. Document generation lets you pull information from a client's case into a document template, like a letter of representation, and automatically populate the template with the correct information.

For example, a document generation tool could pull the defense adjuster's name, your client's date of loss, and your client's policy number and automatically fill them into a document with just the click of a button.

Reporting

Many law firms use software to organize their case information. The most useful software programs analyze that information into actionable reports, enabling law firms to make smarter, data-driven decisions.

Powerful case management software can help you determine whether more clients found you from a radio ad or through a Google search. With that information, you can double down on marketing efforts you know are working and ignore ones that aren't.

Workflow Automation

Every law firm has its own way of doing things. Is your process written down into easily digestible steps? Do new hires know what they're supposed to do during every stage of the case?

With automatic workflows, law firms can automate the process of moving through each case. After each step is completed and the case moves forward, you can assign tasks that need to be completed at every step of the process.

Tasks will show up automatically at the appropriate times. For example, during intake, you can set reminders to get the retainer agreement signed, send out a letter of representation to the defense adjuster, and gather insurance information from the client. With defined workflows, you can ensure you're setting your team up for success.

Email Automation

Many modern personal injury firms communicate with their clients via email. Some case management solutions, like CASEpeer, allow you to automatically send emails to a client as you move through the stages of their case.

You know you're hard at work on your client's case, but they may not. Law firms using automated email campaigns can update clients automatically via email when changes are made to their case. You can also create a schedule of emails that check in with clients during their cases.

If your case management software integrates with Mailchimp, you can automatically add clients to different email campaign lists when their case status changes.

For example, if you transition a client from "Demand Writing" to "Demanded," you can add your client to a My Case is Demanded email list. This campaign may include one or more emails educating the client on what this stage of the case will mean for them.

CRM Management

Every law firm is built on establishing relationships with colleagues, clients, and partners. Managing contacts can help your attorneys and staff be more effective.

Every contact in your case management solution, such as medical providers or a courthouse, is its own entity. You have a history with each of your contacts. Look it up quickly in an open case or access the data in your contact directory. If a staff member accidentally creates a duplicate, CASEpeer's merge tools help your law firm maintain unique contacts.

As time goes on, your firm will be able to see patterns, track changes, and plan for the future. But this is only possible if you keep your contacts organized. This may seem impossible, especially for smaller firms and solo practitioners trying not to drown in the day-to-day tasks.

At CASEpeer, we're not only a technology company--we also offer the best practices and resources through webinars, blogs, training materials, and more, all from the input from successful PI firms. We'll help you refine and optimize your operations, from your contact management to litigation tracking.

02

Optimizing your case management

Aggregating meaningful data across your firm's operations can be a headache. And even if this data is accessible, it's hard to interpret these numbers and trends into actionable insights.

Still, this data is critical to make sure your investments are contributing to your goals. Good reports and platforms can consolidate and analyze your firm's data to show you the right data that's easy to interpret.

If your law firm is spending money on marketing, you should know how much money that investment is making for you in return.

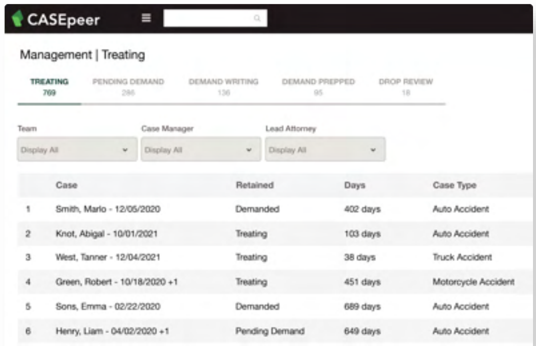
With the right reporting and analytics, you can make smarter decisions that show you what's working (and what's not). The more you can understand from your data, the more time, effort, and money you can dedicate to the things that matter most. Case management software with reporting features is a great way to cut out the heavy lifting and data analysis and jump right to insights.

To get the most from your data and optimize your case management, here are CASEpeer's top tips.

Medical Treatment Tracking

As a personal injury attorney, you know how much of a headache medical treatment tracking can be. To effectively manage records and billing requests, you need a place to organize them on every case and firm-wide. You should be able to see what bills and records have been requested from which providers and when. Oversight over all your treating cases is necessary to ensure they're being built up properly. You need a report that will quickly tell you if your client's medical bills are exceeding his policy limits or if a case that is 89 days old still hasn't received an incident report.

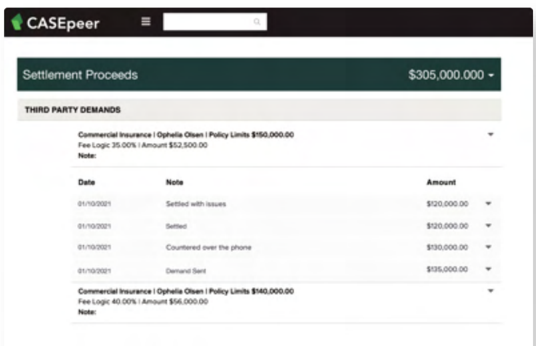
While you can do this manually if your firm only has a few cases at a time, having access to these reports will help you scale as your firm grows. And even if you're not trying to scale, who doesn't want to sleep easier at night?



Track Third-Party Data

CASEpeer not only stores data on your clients but also the various third parties your firm works with or against – insurance adjusters, opposing counsel, judges, and more.

Because of this, you can track important patterns such as previous clients against the same opposing counsel or the ruling history of a judge you have worked with before. With this information, you can make smarter decisions on how you approach your cases. Use your data to settle cases faster while increasing their value.



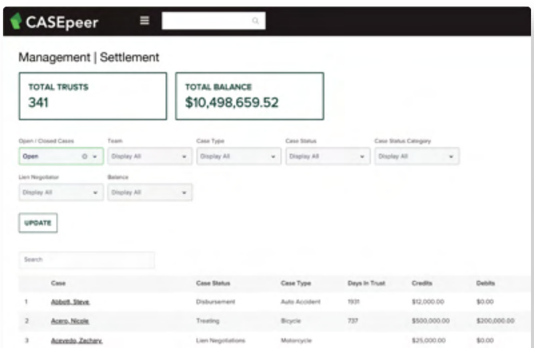
Settlements and Expenses

Tracking your finances is vital for any business. CASEpeer comes with extensive settlement tracking tools explicitly made for personal injury attorneys to track their costs, negotiations, and client trust activity in each case.

In addition to detailed insights per individual case, firm administrators can see a pipeline of demands, offers, and pending funds firm-wide. They can also get a snapshot of the firm's projected monthly income, which each attorney can filter to see who is succeeding and who might need assistance.

CASEpeer comes with extensive settlement tracking tools explicitly made for personal injury attorneys. We understand how important it is to track your out-of-pocket costs, as well as all the credits and debits from the client's trust.

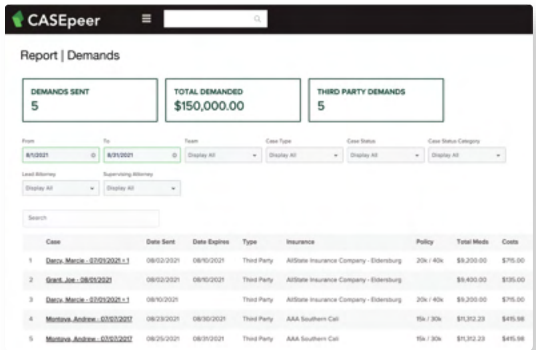
In addition to detailed insights into each case, managers can also see a pipeline of demands, offers, and pending funds firm-wide. Finally – clarity into your monthly projected revenues. Filter by lead attorney to see who is succeeding and who might need more help. Finance-related reports like collected fees or issued payments allow you to digest your historical data meaningfully. CASEpeer's filters make it easy to find patterns; whether searching by case type or lead source, we help attorneys shape their future decision-making.



Demands and Offers

With CASEpeer, your attorneys can track every offer and demand in real-time. Differentiate between third-party and uninsured motorist demands, track med pay requests, and pip payments. Log offers, counteroffers, and follow accepted settlements until the check arrives.

Anyone who opens a file in CASEpeer can pick up the negotiation process where another attorney left off. No more guesswork or catch-up.

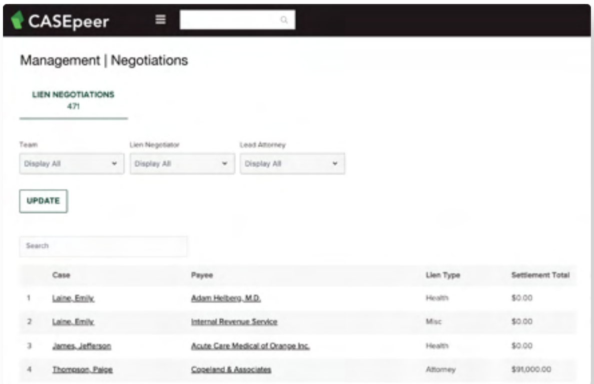


Lien Negotiations

Negotiating liens is an essential part of closing out a personal injury claim. CASEpeer makes it easy to manage reductions effectively, putting more money in your clients' pockets. Track all liens from beginning to end, helping your attorneys and staff stay focused. With tools like lienholder history, CASEpeer helps teams maximize their potential.

Law firms that negotiate liens are leaving money on the table if they're not capitalizing on historical data. Case management software built for personal injury law firms can aggregate your history with insurance companies, adjusters, health providers, and other contacts so you can make the best strategic decisions.

While you should be tracking settlements for each case, you should also have access to a report that shows settlements across all cases. Doing so enables you to forecast the money coming into your firm and empowers you to plan accordingly.



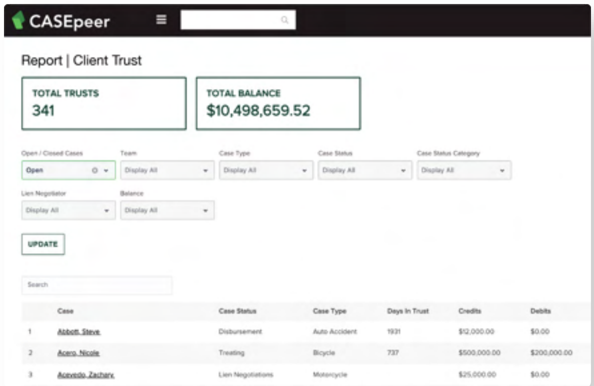
Paying Clients

Once a case is settled, you want to ensure the client gets their money as soon as possible. Your case management software should allow you to see all cases in lien negotiations and how long they have been in that status.

Ideally, you should see how many cases each lien negotiator is working on and for how long.

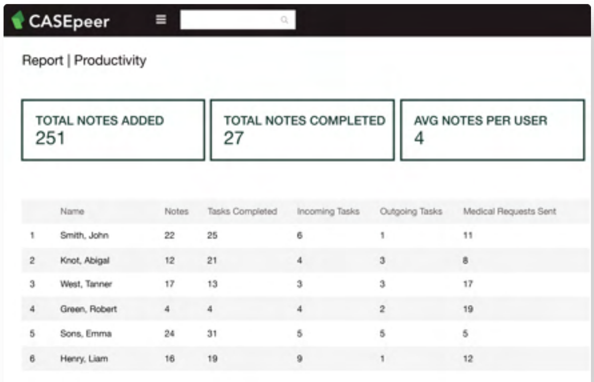
When you see a lien negotiator has too many cases in lien negotiations, you can reassign files or identify the cause of the bottleneck.

Your client is the last one to get paid, and clients don't like to wait. If a case gets stuck in lien negotiations for too long, the client will be unhappy and could leave you a negative review. Case management software with the proper reports can help keep clients happy and minimize negative feedback.



Management and Performance

Administrators and supervising attorneys can track task management and productivity firm-wide with CASEpeer's reports and management screens. Make sure your team is completing tasks, taking notes, and sending demands.



03

Monitoring and optimizing your marketing efforts

If your firm is spending time and money on marketing (or thinking about doing so), you should know the impact and outcomes of your resources. Does your law firm have an easy way to view conversion rates according to lead type, and the ROI of your campaigns?

Knowing this information allows you to cut out marketing methods that aren't working and double down on those that are.

Personal injury law firms love to use marketing to build their practice. But how sure are you that you're getting the most out of your marketing dollars? With several marketing campaigns and referral streams, can you confidently say where your clients are coming from?

An easy way to answer these questions is to:

- Track the source of every lead.
- Generate reports based on that data.
- Track your lead conversion rates for every source.

Adopting these tactics will provide key insight into the marketing strategies working and those that aren't. This data helps your firm identify strong and weak lead sources, allowing you to focus on those with a more significant impact.

Your blueprint for a successful practice

The right software can take your personal injury law firm from good to great. Empower your team with an intuitive case management platform backed by industry-leading support to reduce admin work, handle more cases, and provide the best possible client experience.

Highly rated practice management software for personal injury

Enhance the client experience

From intake to settlement, you can turn every touchpoint into a positive client experience. Let CASEpeer focus on deadlines, note-taking and task management so you can focus on caring for your clients.

Built for personal injury

Instead of a generic case management solution you have to customize, CASEpeer is turnkey for personal injury law firms. You'll have everything you need, from medical treatment tracking to demand negotiations.

Optimize your operations

Adopt a legal practice management solution with built-in best practices from the nation's leading law firms. CASEpeer is built to increase efficiency and accountability across every department.

Improve your bottom line

Track progress and achieve your goals with over 50 turnkey reports from CASEpeer. The result? Harness your KPIs and gain deep insights into your firm's performance.

Set your law firm up for long-term success

This guide is designed to provide you with the knowledge and guidance you need to set a solid foundation for success at your Personal Injury firm.

At the core, your personal injury firm needs to focus on three strategies: building and nurturing client relationships, developing an online presence, and establishing scalable, sustainable processes and workflows.

From there, you can optimize your operations with the data and tools you've implemented. From case management and litigation tracking to monitoring your marketing spend, following these tips will give you a blueprint for long-term success.

To learn more about how to run a successful personal injury firm, you can subscribe to our blog at www.casepeer.com/blog

About CASEpeer

CASEpeer is the leading cloud-based case management solution built for personal injury attorneys and their firms. With a turnkey solution tailored for the unique needs of personal injury law and backed by industry-leading support, your firm can onboard and hit the ground running that day. Gain visibility across your entire firm's operations, from case management and calendaring to employee performance, pipelines, and profitability. Built by former personal injury professionals, CASEpeer provides everything your law firm needs to succeed.

To learn more about CASEpeer, visit https://www.casepeer.com/try-casepeer