

# HubSpot for law firms

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# Introduction

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In today's competitive legal landscape, managing client relationships, generating quality leads, and maintaining operational efficiency are crucial for sustainable growth.

This short guide explores how HubSpot's integrated platform can help your firm overcome common challenges and achieve its strategic objectives.

# Principles

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## Client Relationship Management

Modern law firms face increasing pressure to deliver exceptional client service while managing complex relationships across multiple practice areas. Common challenges include:

- Fragmented client communication across various platforms and teams
- Difficulty tracking and following up on client interactions
- Limited visibility into the complete client journey
- Challenges in maintaining consistent client engagement

## Business Development and Growth

Your firm's success depends on steady growth through both new client acquisition and existing client retention:

- Need for better insight into referral sources and relationship management
- Difficulty tracking return on investment for marketing initiatives
- Limited cross-selling opportunities between practice areas
- Challenges in scaling operations while maintaining service quality

## Marketing and Data Management

Modern legal marketing requires sophisticated data management and analytics:

- Limited access to comprehensive client and matters data for targeted marketing
- Difficulty in running effective cross-selling campaigns
- Challenge in measuring marketing ROI
- Need for better segmentation and personalisation

# The HubSpot Solution - An AI powered smart CRM



## Unified Client Management

Transform your client relationship management with:

- A single, comprehensive view of all client interactions across all teams and Matters
- Automated follow-up and engagement tracking
- Integrated communication tools across all channels
- Custom "Matters" tracking integrated with client profiles
- Alignment and transparency across marketing, business development and client delivery

## Enhanced Referral Management

Optimise your most valuable lead source:

- Complete visibility into referral sources and patterns
- Automated referral tracking and management
- Performance analytics for referral partnerships
- Streamlined communication with referral partners

## Data-Driven Marketing

Elevate your marketing effectiveness through:

- Advanced client segmentation capabilities
- Automated cross-selling campaigns based on client profiles along with lead scoring
- Comprehensive ROI and campaign tracking and reporting
- Personalised content delivery
- Integration with 3rd party applications for event management and ad campaigns

## Operational Excellence

Improve firm-wide efficiency with:

- Automated workflows for routine tasks such as KYC and matter inception
- Integrated billing and marketing data
- Custom dashboards for different practice areas
- Comprehensive reporting and analytics
- Client portals and knowledge bases

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## Immediate Impact

- Centralised client relationship management
- Enhanced visibility into business development activities
- Improved marketing effectiveness
- Better cross-selling between practice areas

## Long-term Value

- Increased client retention
- More efficient operations
- Better ROI on marketing spend and BD spend
- Sustainable growth framework

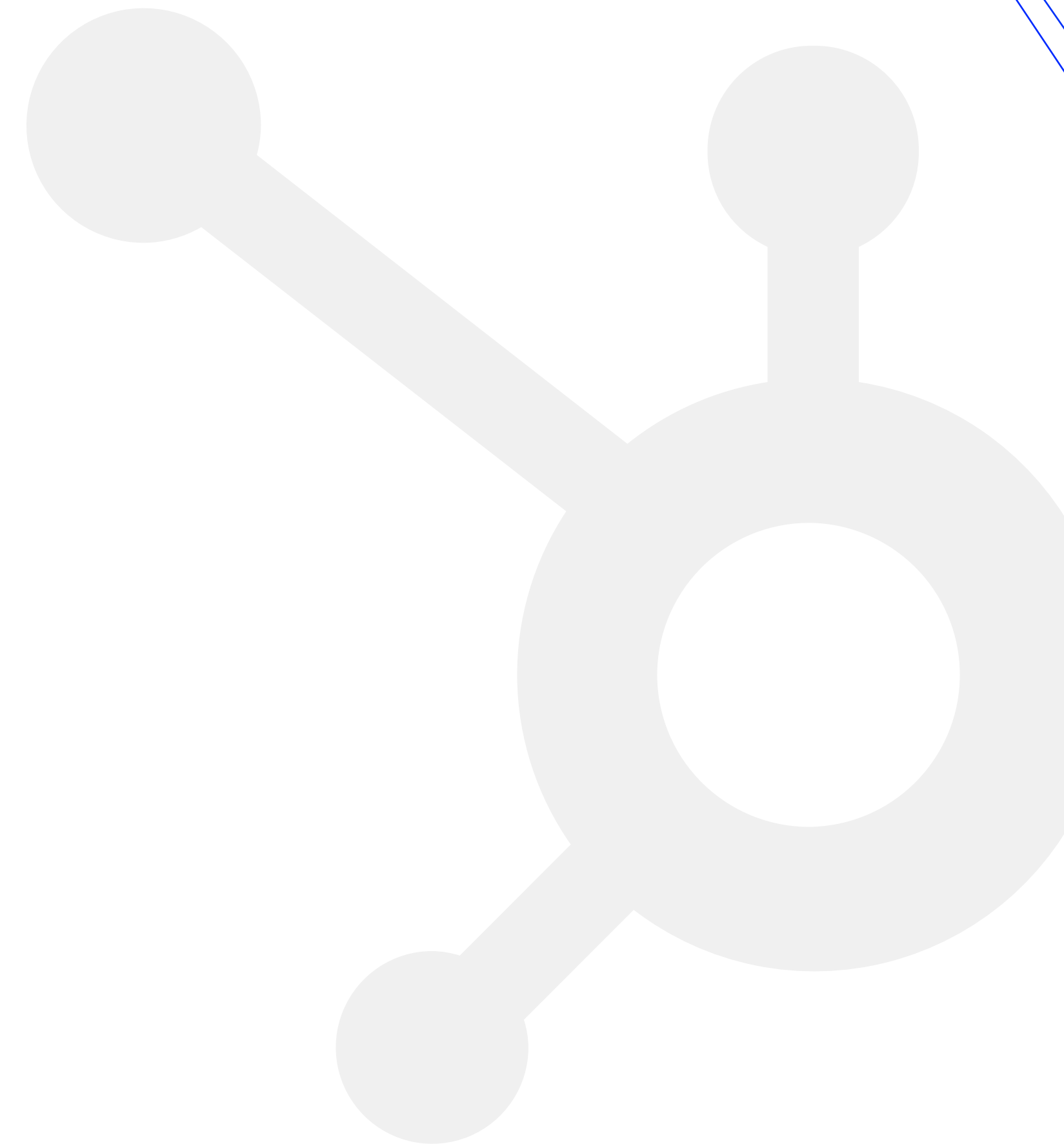
## Compliance and Security

- GDPR-compliant data management
- Secure client information handling
- Comprehensive audit trails
- Role-based access control

## Implementation and Support

Our specialised team understands the unique needs of law firms and provides:

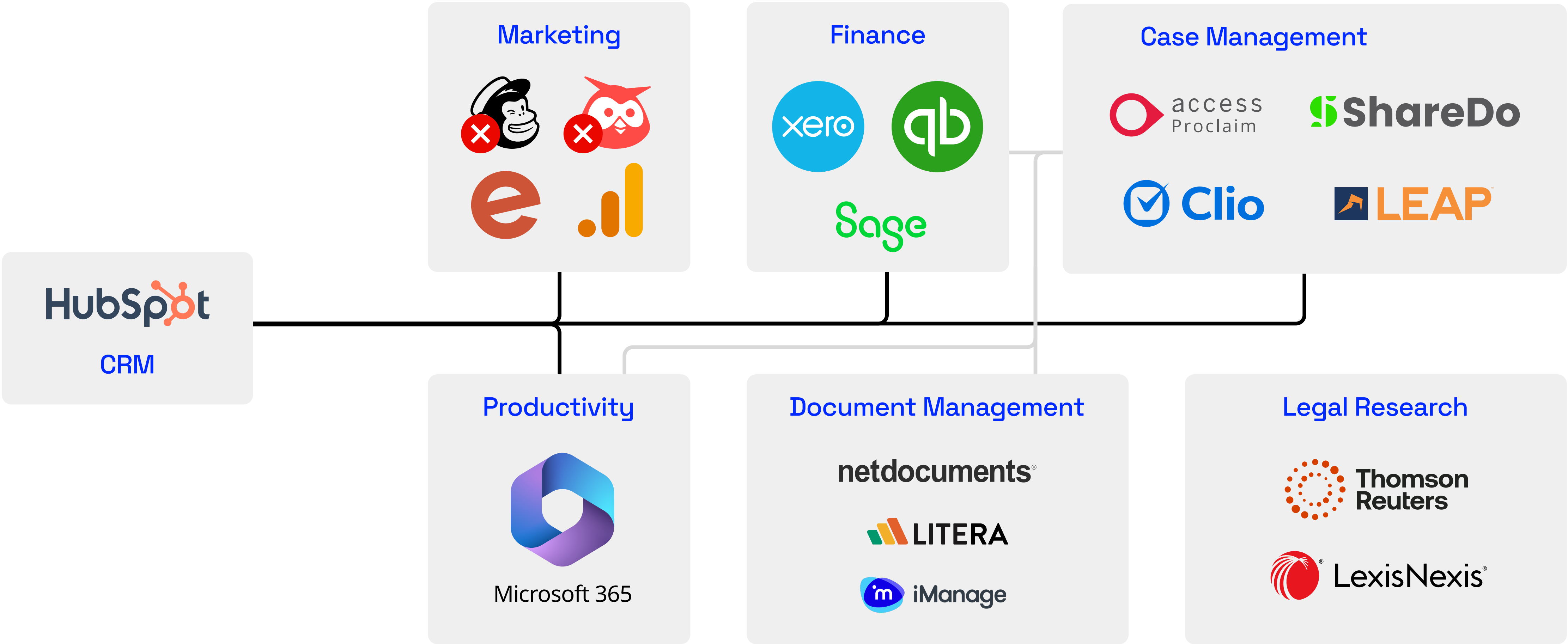
- Custom implementation tailored to your firm's needs
- Integration with existing legal software
- Comprehensive training and support
- Ongoing optimisation and consultancy





# A single view of the client

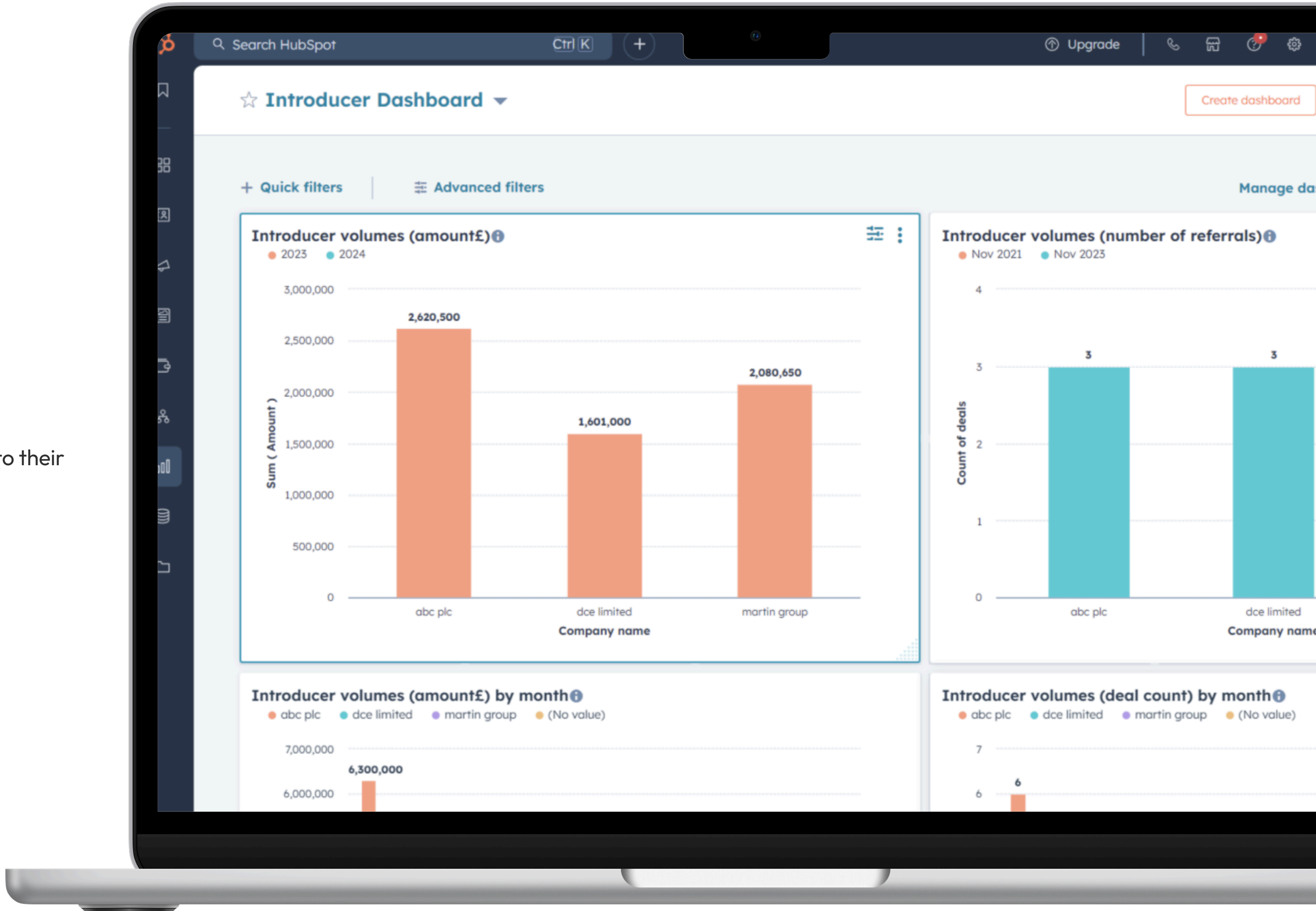
A 360 view of the client and prospect utilising HubSpot's rich API and integration capabilities.



# Dashboards

Managing introducers and referrals using dashboards gives visibility to their most lucrative new business channel.

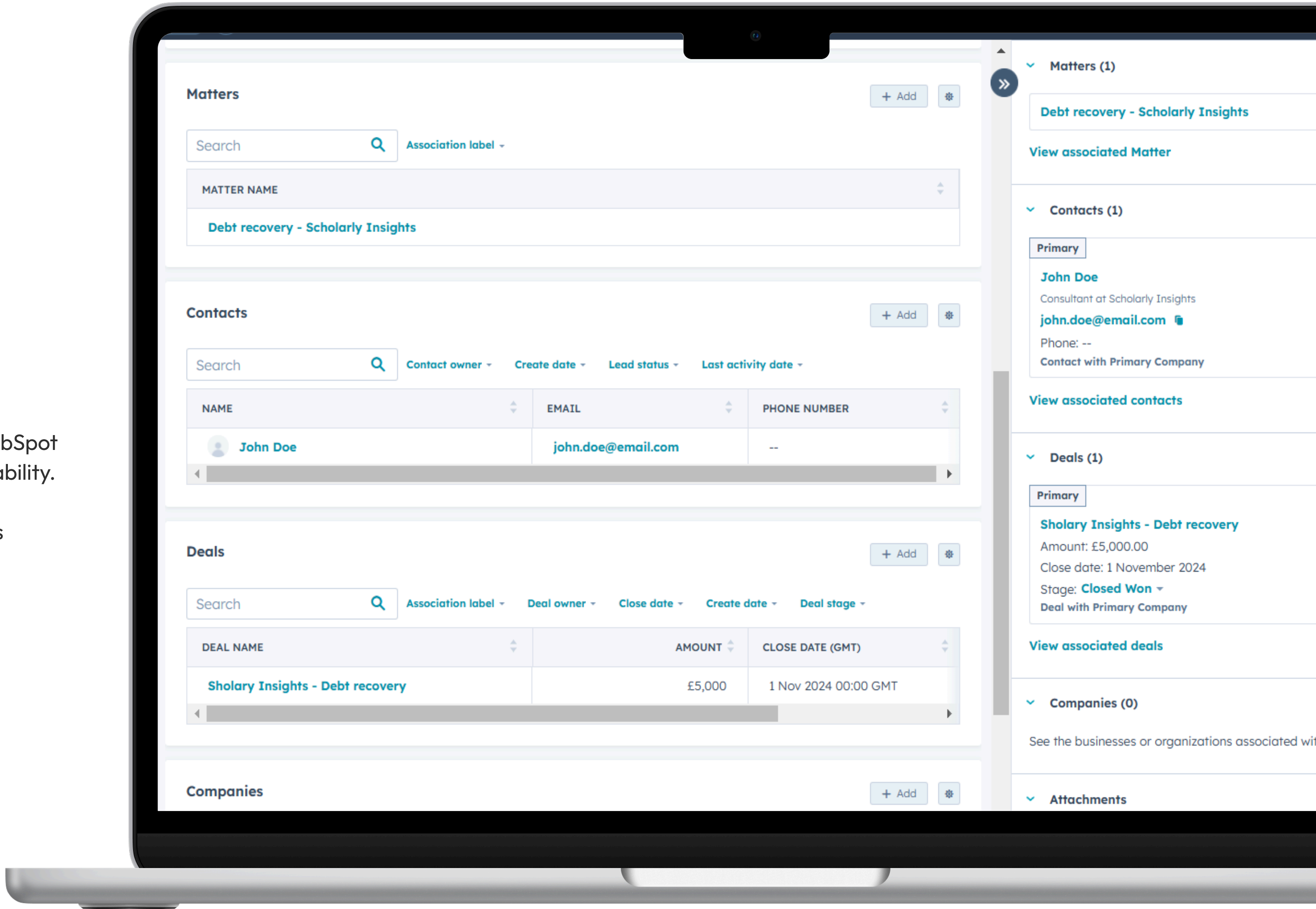
A channel that is rarely well managed.



# Matters

Having ‘Matters’ as a custom object brings all client case data into HubSpot and significantly improves marketing and business development capability.

Automated communications can be triggered off case closure such as feedback requests, annual reviews and automated client journeys.

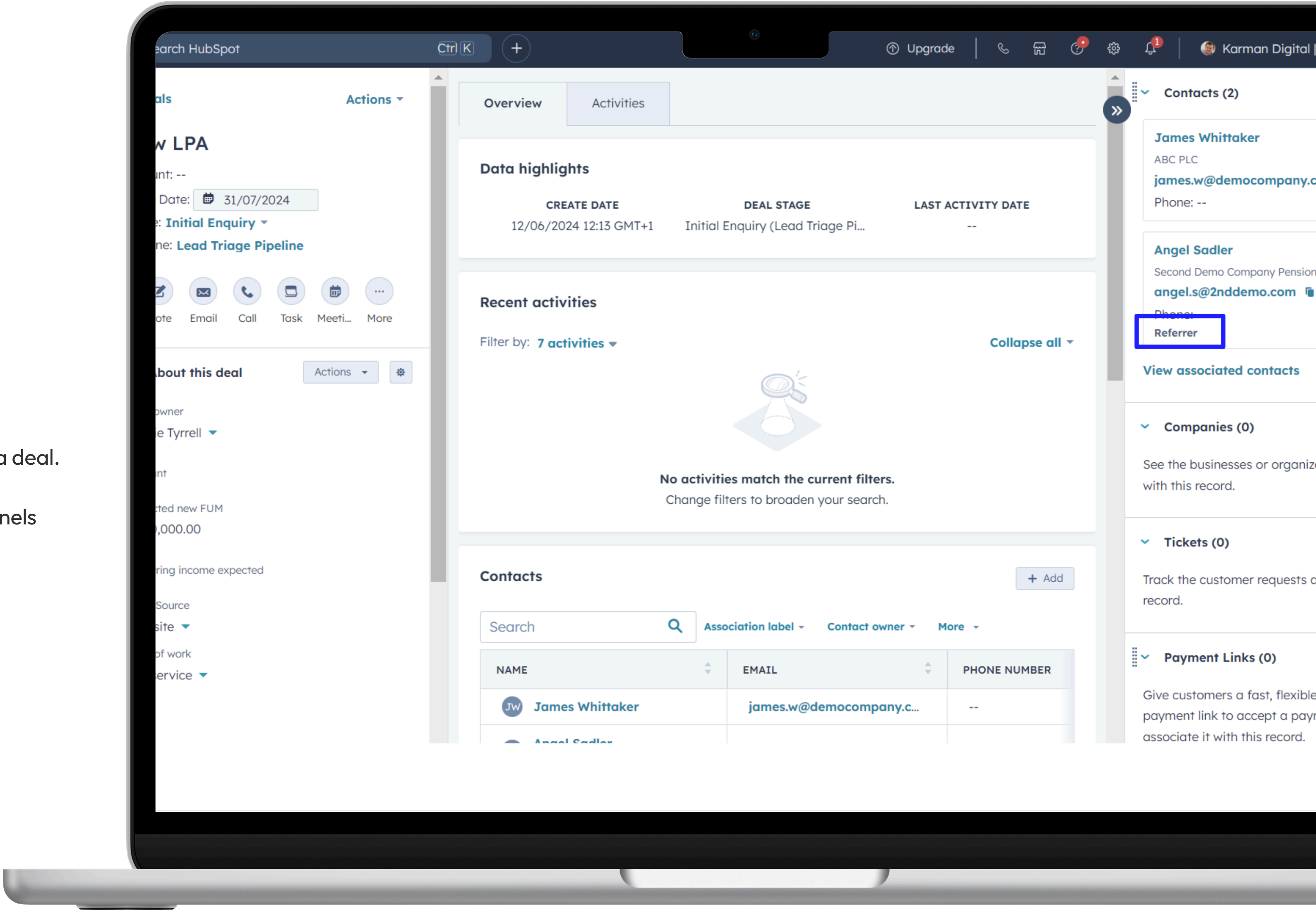




# Referrers

Tracking referrers through association labels provides valuable MI. Association labels can also be used to identify other firms involved in a deal.

Accurate, data rich attribution reporting across all new business channels enables you to deliver much more effective marketing and business developmment activity.



# Get in touch!

We work closely with our clients to turn HubSpot into a powerful tool that drives results.

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