Best Practices:
Efficient Client Intake

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Initial Phone Inquiries

- Collect as much of the critical information as possible at the beginning of the process – before they are even a client
- Much of this information is asked during an initial inquiry. Why ask it again?
- Customize a phone inquiry form to capture it
- This is the beginning of the file intake process and is also a critical marketing metric

Avoid Conflict Issues

- Include a Conflict Check as part of your intake process
- Use the data you have been collecting during your intake and file workflow to check for conflicts
- Generate a report
- Include a method for interpreting the report

Collect the Information You Need

- Necessary file information
  - Name, address, etc.
- Future marketing information
  - Birthdays, children, spouse, hobbies
- Reporting information
  - Referral Source
  - Name of Referring Individual
- Make It Required

Streamline Workflow

- Design a workflow system and use it consistently
- Document the system
- Follow the system
- Update when needed
- Results
  - Consistency
  - Confidence
  - Transferability

Use Less Paper

- A paperless office begins at the intake stage
- Utilize scanning technology to turn paper into digital paper
- Save scanned documents to Time Matters for fast retrieval
- Use ScanSnap with Adobe technology to OCR documents as they are scanned.
- Create a text index of your documents

Test and Measure

- Now that you have collected all of this information, put it to use
- Time Matters Reporting Features
  - Quick Tabs
  - Send to Excel
  - Custom Reports
- Measure the effectiveness of your marketing efforts

Learn More!

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