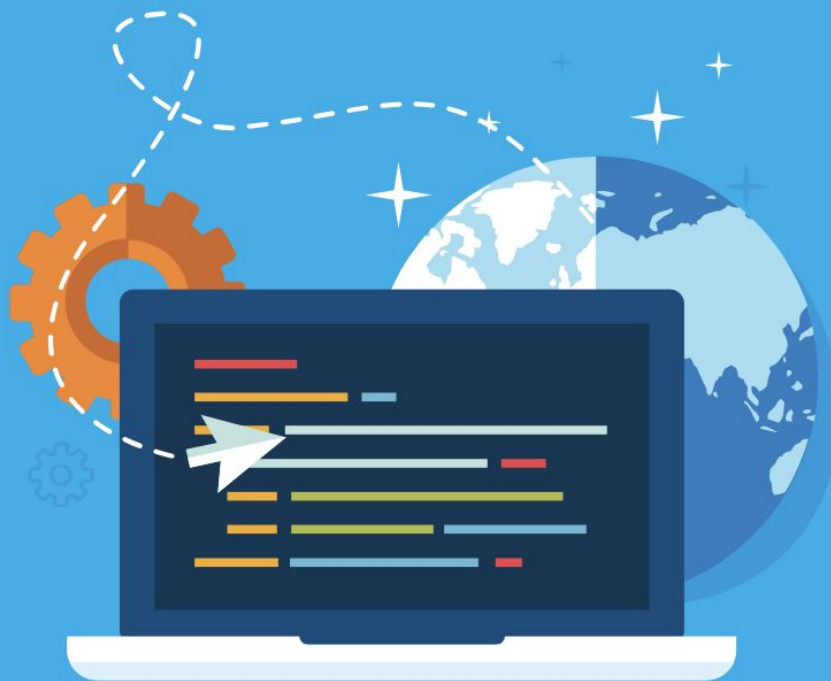


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 Lexicata



## How Lexicata Powers a 30+ Person Criminal Defense Firm

Free Case Study

## Background

**Neil Shouse** is a Los Angeles criminal defense attorney and a graduate of UC Berkeley and Harvard Law School. Prior to starting his own practice, Mr. Shouse served 5 years as a Los Angeles Deputy District Attorney, where he won 96% of his more than 40 jury trials. He has been featured on Dr Phil, CNN, Fox News, Al Jazeera, Court TV and Good Morning America.



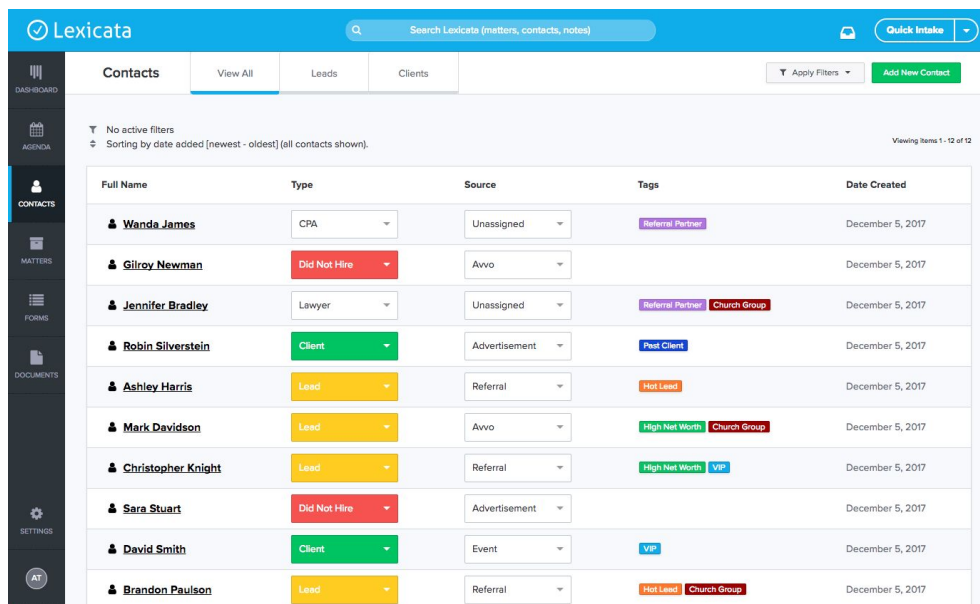
Mr. Shouse branched out into private practice in 2004 when he founded his own firm, Shouse Law Group. Today, Shouse Law Group is spread across three states, five offices, and has over thirty attorneys and staff.

Needless to say, Mr. Shouse has enjoyed a lot of success over the course of his career. He attributes the growth of his private practice to his keen focus on improving communication, creating standardized workflows, and providing an exceptional client experience.

## Leveraging the Power of Software

Shouse Law Group has been using software to manage the practice since 2009. Before implementing Lexicata in early 2016, his team used a distributed system of products to track their leads and handle the intake process: Gmail to manage new leads (using folders and labels for categorization), Outlook Calendar to manage

appointments, Outlook and Gmail for email communication, Echosign for e-signatures, and WooFoo and Intake123 for online intake forms.



The screenshot shows the Lexicata dashboard interface. At the top, there is a search bar and a 'Quick Intake' button. Below the search bar, there are tabs for 'Contacts', 'Leads', and 'Clients'. The main content area displays a list of contacts with the following columns: Full Name, Type, Source, Tags, and Date Created. The contacts listed are:

Full Name	Type	Source	Tags	Date Created
Wanda James	CPA	Unassigned	Referral Partner	December 5, 2017
Gilroy Newman	Did Not Hire	Avvo		December 5, 2017
Jennifer Bradley	Lawyer	Unassigned	Referral Partner, Church Group	December 5, 2017
Robin Silverstein	Client	Advertisement	Past Client	December 5, 2017
Ashley Harris	Lead	Referral	Hot Lead	December 5, 2017
Mark Davidson	Lead	Avvo	High Net Worth, Church Group	December 5, 2017
Christopher Knight	Lead	Referral	High Net Worth, VIP	December 5, 2017
Sara Stuart	Did Not Hire	Advertisement		December 5, 2017
David Smith	Client	Event	VIP	December 5, 2017
Brandon Paulson	Lead	Referral	Hot Lead, Church Group	December 5, 2017

*Lexicata combines dozens of separate tools into one easy-to-use dashboard*

Mr. Shouse found value in leveraging this technology, but ran into a fundamental issue due to the difficulty of managing so many different programs simultaneously. The process was cumbersome and leads would inevitably fall through the cracks, resulting in low yield on his marketing budget and missed opportunities. Mr. Shouse struggled to find a solution that was affordable, geared towards lawyers, and met all their needs within a single product.

## Seeking A Solution

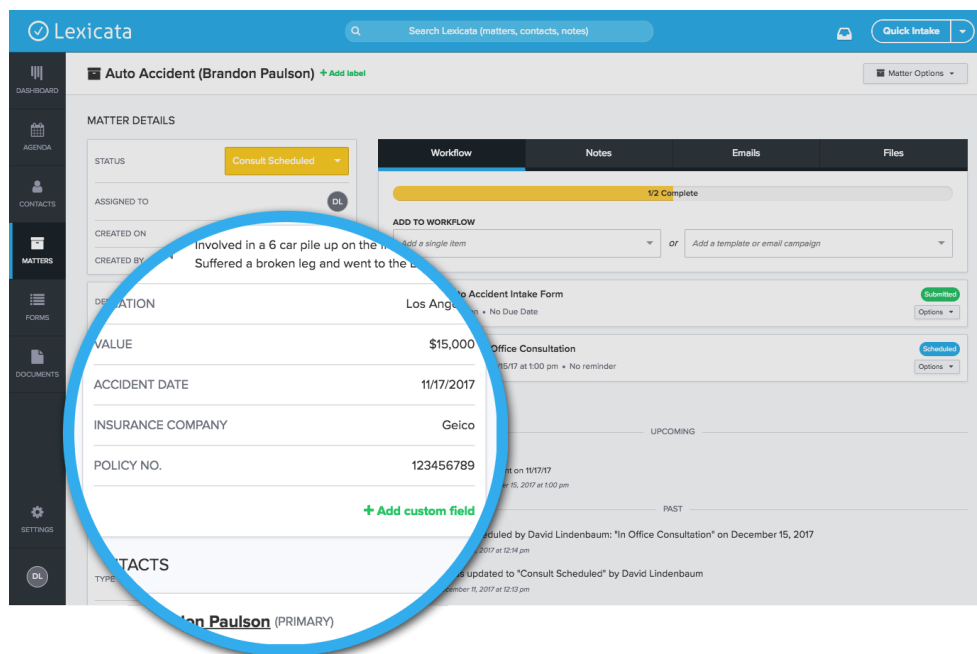
Mr. Shouse was referred to Lexicata in early 2016 by a colleague who was familiar with the product. Shouse Law Group began using Lexicata in one law office, and then shortly afterward, decided to implement separate Lexicata accounts for each additional Shouse Law Group location.

Once they fully transitioned to Lexicata, they were able to drop six different technologies which they had used previously, saving them from the time, money, and hassle associated with managing a distributed system of software programs. Lexicata now serves as the all-in-one solution for Shouse Law Group's client intake and pre-case CRM needs.

# Implementing New Technology

## Initial Investment and Setup

Mr. Shouse personally spent considerable time getting to know the program before rolling it out to his entire staff. He spent roughly two weeks fully customizing all aspects of his account to ensure the efficacy of the program and to tailor the process to fit his team's workflow. He was able to utilize the training and support offered by Lexicata during this time to ensure he was creating the most effective plan for managing an influx of new leads.



*Lexicata's online intake tools eliminate manual data entry for your staff, which means better client intake and boosted efficiency.*

While the setup required considerable time, the upfront investment was well worth it in his opinion. Working closely with his Account Manager, Mr. Shouse was able to get a fully built-out and customized account, as well as intensive staff training and ongoing support.

## Capturing Leads

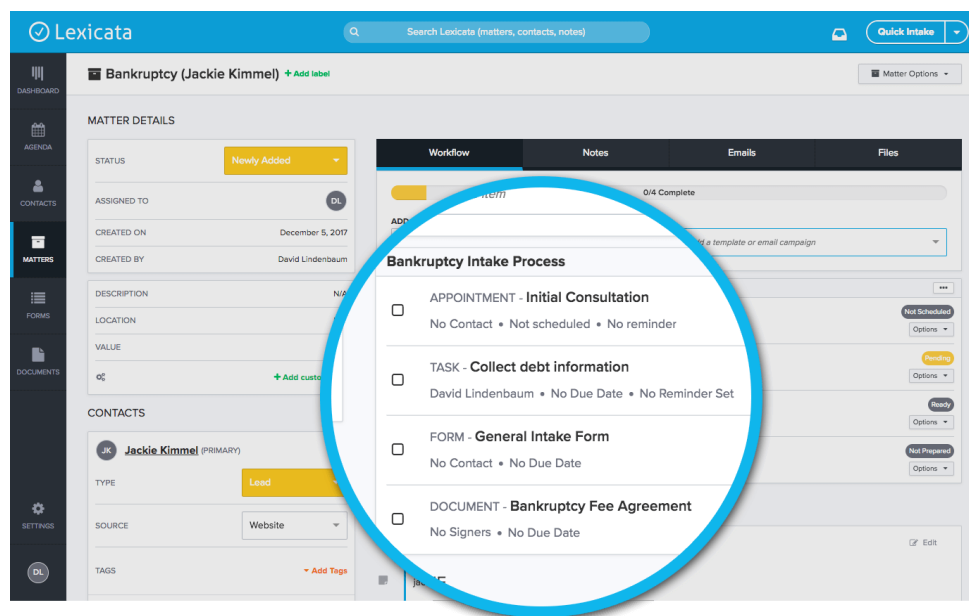
Shouse Law Group utilizes integrations provided by Lexicata to automatically capture leads from various channels, including their website and their virtual answering service. These integrations in particular have supported the continued

growth and success of his firm while using Lexicata by eliminating data entry and ensuring that every lead is properly managed.

## Drip Email Campaigns

Mr. Shouse started strategically planning how to generate greater engagement from his leads by using Lexicata's features. Previously, he and his staff would have to spend countless hours following up with each lead, eating up valuable time and resources. Lexicata allowed him to mitigate this issue by using drip email campaigns, tailored to each of his practice areas.

These automated emails, triggered at 1 day, 3 days, 5 days, and 7 days, contain helpful information around the potential case (e.g. a domestic violence case may contain informative videos and other support material for the client to review). Once one of these emails generates a response from the lead, his staff will take over to engage and qualify them as a potential client.



*Build client workflow templates once and reuse them endlessly.*

This new process has allowed staff to spend less time on outreach to cold leads, and more time fostering relationships with potential clients and working on their cases. Overall, the drip campaigns have saved them countless hours spent on follow up, and enabled Shouse Law to expand by adding four additional intake staff.

## Streamlining Retention

By utilizing the broad spectrum of intake and retention tools Lexicata has to offer, Mr. Shouse has streamlined his entire intake process and greatly improved his conversion rate. Shouse Law Group has created a systematic, repeatable intake process by leveraging the power of Lexicata's custom intake checklists. These checklists are customized for each type of matter, and they contain tasks, automated emails, online intake forms which clients can fill out, and fee agreement templates which can be automated and e-signed using Lexicata's integration with HelloSign.

The process from initial query up to retention formerly took about 16 days on average. Since adopting Lexicata, that average is down to only 5 days. Reporting on Intakes Implementing Lexicata has also allowed Mr. Shouse to report on conversions, staff performance, and the efficacy of his marketing efforts. Understanding where both the opportunities and gaps lie provides him the ability to achieve consistent scalability and growth by ramping up what's working, and downscaling what isn't.

Want to Learn More About Lexicata?

[Schedule a free demo with a Lexicata Account Strategist](#)