

How CT Trial Firm expanded its workforce 7x with Lead Docket

Channel by channel marketing analysis and automated lead sequencing helps keep Connecticut Trial Firm on its rapid growth trajectory



Practice Area: Personal Injury

Location: Connecticut

Solutions: Lead Docket, Filevine, Docs+

<https://cttrialfirm.com/>

Ryan McKeen is the founder and managing partner of personal injury firm, Connecticut Trial Firm (CT Trial). Attorneys at the firm consider themselves native users of Filevine and Lead Docket because they were some of the first clients of both solutions. In 2020, CT Trial expanded from two to 14 people and has its goals set on even more growth. Managed by Ryan McKeen and Andrew Garza, CT Trial aims to help and empower those that are wrongfully injured.



The Challenge

Ryan McKeen of Connecticut Trial Firm is similar to many founders and managing partners at small firms — a jack of all trades. He runs the legal function but also handles marketing and business operations. Reflecting on life before Lead Docket, Ryan says he agrees with the sentiment shared by his colleague that “the biggest issue I have seen with firms is that they don’t catch the rain they’re making.”

With a growing firm, Ryan knew he needed to find a product that could help him catch and chase potential clients. On his colleague’s recommendation,

Named the 10th **fastest growing firm** in the country by Law Firm 500

Expanded personnel 7x and still growing

Native **Lead Docket** and **Filevine** users

he got started with Lead Docket. Since then Ryan has been able to strategically spend his marketing budget while optimizing client outreach to catch his metaphorical rain.

Ryan felt confident choosing Lead Docket because, like Filevine, he could tell it was built by people who know and understand how law firms operate — specifically personal injury law.

Strengthening marketing spend and unifying leads with Lead Docket

The seven benefits that make Lead Docket a game-changer for Ryan:

1 Reporting



I love the reporting in Lead Docket. The built-in features are fantastic and it is simple.”

CT Trial utilizes out-of-the-box reporting to track daily leads and marketing spend. Additionally, they’ve implemented sequencing programs to push leads through their intake process. The sequencing allows them to send auto-responder emails or texts to leads which automates communication. Ryan values that sequencing makes the entire process easy for the intake team.

2 Simple onboarding



I looked at the product and felt it didn’t need a lot of my tweaking.”

CT Trial decided they needed Lead Docket and moved forward. After signing the contract, they were able to move forward with implementation quickly. While there is the option to customize the platform, Ryan knew that he didn’t need that. The standard setup of Lead Docket was everything his firm needed.

3 Centralize lead intake



I think alone, the biggest impact of Lead Docket is the centralization. I want to see our lead numbers, I go to Lead Docket. I want to see what cases we’re trying to sign, I go to Lead Docket.”

Before Lead Docket, CT Trial was facing unorganized leads from emails, texts, forms, and calls. There wasn’t a central source to consolidate all incoming leads, which caused a scattered approach to follow-up and took a toll on intake’s focus. Lead Docket has helped Ryan by providing a holistic view of all leads that the firm is working on. It also allows him to understand the pipeline better. Further, the consolidation that Lead Docket provides enables the intake team to keep their efforts all in one place.



My intake people can log in and can look at their Lead Docket. I know they’re not dealing with anything other than leads.”

4 Strategic outreach



“PI is so fast. I don’t want leads waiting a full day. I want a text message to go out two hours later to follow up with that person. I use timed notifications to automate and manage our outreach..”

Every personal injury attorney understands that time is of the essence. When prospective clients are looking for representation, they’re moving quickly and make decisions even quicker. Most of the time they’ll end up with the firm that has the best communication and reaches out to them promptly. Ryan and his team use message templates to time notifications to send follow-up communication to new leads at exactly the right time.

5 Data-driven marketing



“I’m not guessing. I’m not saying ‘how many leads did I have last month?’ ‘What is the average fee? How many do we get quarterly? Are we above or below? Are we growing? What is the trend here?’”

Lead Docket allows CT Trial to take the guesswork out of its marketing spend and focus on ROI. They have eliminated the blanket approach of dividing the leads by the average fees generated and hoping for another good turnout next quarter. With Lead Docket, they work the way that marketing works. They can drill down and see that \$800 spent on one channel didn’t generate clients while \$12,000 on another generated only a few clients, but all were high-value clients. They can look at each effort and optimize their monies to achieve the best ROI.

6 Custom views and permissions



“The other thing with Lead Docket is I can keep the data I want private. My partner and I can see all the data, but the whole firm can’t. So, it’s not like an associate could say ‘here are the sources, here’s the income, and here’s where it comes from.’ So it’s really nice in that way.”

Running the firm is running the business. Ryan can keep top-line revenue between him and his partner with Lead Docket user permissions. While transparency is important to an extent, Ryan and his partner can keep their core business finance between the two of them. This extends down to having different permission views for their associates and intake to keep everyone focused on the metrics that matter most to them.

Ryan views Lead Docket as complementary to Filevine. He describes the relationship of the two similarly to how he looks at his business. He separates his business into three segments; before unit, during unit, and after unit. Lead Docket serves the firm before unit while Filevine serves the firm during and after unit. The solutions that Ryan and his team use have put him on a strategic growth trajectory and position him for even more growth.

See how Filevine can help your firm grow with a free demonstration.

Call us at 801-657-5228.

leaddocket.com/ct-trial-firm-ld/