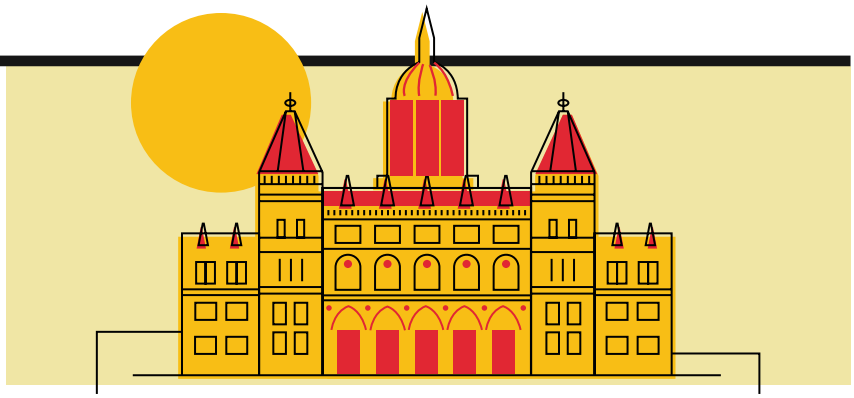
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Case Study

Lead Docket and ApexChat: The key to increasing lead conversion at Trantolo & Trantolo

How the firm increased their website lead conversions with ApexChat & Lead Docket



Trantolo & Trantolo, LLC

Practice Area: Personal Injury

Location: Hartford, CT

Number of Staff: 50

Using ApexChat since: 2015

Using Lead Docket since: 2016

https://www.trantololaw.com/

Trantolo & Trantolo, LLC is a personal injury law firm located in Hartford, Connecticut. The team offers a variety of plaintiff-side services, with a strong focus on single-event personal injury. Amy Piccoli, director of marketing, sets up the firm for current and long-term growth by pairing Lead Docket and ApexChat. The two solutions enable her to track referral sources and intake conversions while streamlining the prospective customer experience. help and empower those that are wrongfully injured.

The Challenge

After launching ApexChat in 2015, Trantolo & Trantolo, LLC saw an influx in live chat leads. While this growth was welcome, they needed to set up their team for success with a process to track and follow up on all the incoming leads. That's where Lead Docket came in.

Historically, Trantolo & Trantolo used a paper intake system. That process caused friction at the firm due to scalability and the lack of reporting capabilities. After evaluating several intake solutions, the firm landed with Lead Docket as the best software to streamline their training process for new employees, improve their relationships with prospective clients, and sign more clients.

$ Lower cost per lead

$ Increased referral revenue

Increased live chat lead conversions by **34%**

In the first year of combining the power of ApexChat & Lead Docket, Trantolo & Trantolo, LLC increased their live chat lead conversions and continued on their growth trajectory with expanded caseloads. Additionally, for the first time, they were able to accurately track each lead coming into the office—this offered precision and minimized human error.

Why the Lead Docket & ApexChat duo is the linchpin of Trantolo & Trantolo, LLC.

1. Accurate lead source tracking

Before Lead Docket, Amy felt she spent too much time calculating the firm's marketing ROI. Now, Lead Docket automatically tracks the numbers for her.

> Lead Docket, to me, has been an absolutely amazing tool. To have the information at my fingertips, at the click of a button, and not having to dive through other systems is essential. All the information from a marketing point of view is right there."

Lead Docket has solved the firm's issue of unreliable intake data with the added benefit of customized reporting.

> Before Lead Docket, if I go back a really long time, we used a paper system. That paper had to go from desk to desk. Now, from the beginning to the end of the process with Lead Docket, we can go in and pick up in real-time. From the last text message sent, or whatever the last communication was. It's just modernized the way our whole intake process works."

2. Increased lead conversions and lower costs per lead

Within the first year of using Lead Docket and ApexChat together, Trantolo & Trantolo was able to hone in on the lead quality and put more emphasis on high-quality leads to increase conversions.

Additionally, they identified prospects' preferred communication methods, through their mobile devices. With enhanced and accurate tracking combined with reaching prospects in their preferred method, the firm increased their live chat lead conversions by 34%.

The ability to sift through lead info with Lead Docket helps the firm optimize its marketing spend by seeing which ad money is the most effective.

> I previously tracked conversion rates with Needles, but it was a lot of steps. I would have to add up how many calls we had versus how many we wanted. Now I know I can access accurate reports in Lead Docket without spending valuable time."

3. Improved client communication with ApexChat Call Connect

As the docket at Trantolo & Trantolo grew, it became difficult for the intake department to differentiate between prospect calls and client calls. It confused the firm and clients alike, with the chance of callers being routed to the wrong team.

To remedy this issue, Amy's team uses ApexChat's Call Connect feature. With Call Connect, chat agents have access to caller data and can connect qualified prospects directly to intake office phones from the chat window. Connecting prospects from a mobile or desktop chat to an internal operator saves time and decreases the friction for the prospect.

After connecting, the intake team can tag these leads in Lead Docket with the notes tab to ensure nothing slips through the cracks. Tagging centralizes prospect info to ensure that the firm presents a unified front to the prospective client.

> I'm pulling reports daily, weekly, and monthly to review the key marketing analytics. To not have to burden intake or attorneys and paralegals to go back and get that input, that beginning piece of information about how the client finds us... is crucial."

Quick-view client data is not the only benefit of Lead Docket at Trantolo & Trantolo. It also helps the team stay on top of their leads to ensure each one receives a follow-up.

> It is a lot easier to communicate back and forth with the client using the Lead Docket messages tab. You have all the info right there in front of you."

4. Enhanced referral processing with Lead Docket

Building a robust referral network can be challenging and time-consuming. A foundation of Lead Docket is helping firms connect. Trantolo & Trantolo utilizes that core functionality to solidify their rapport with firms they have a referral relationship with.

> The process to refer out leads is a single click. If it's a case that we don't handle, we have the list of attorneys that we refer to stored within Lead Docket. The part that we like best is it's all automated. Once you send that over to the referring attorney, they're prompted with, "Did you accept this case? 'Yes or no'. It keeps the dialogue between the two firms going."

5. Enhanced referral processing with Lead Docket

Ensuring a large firm is working collaboratively and staying out of silos is not an easy task. Lead Docket has helped the firm enhance its internal communication by storing every prospect touchpoint in one spot. The days of putting clients on hold or asking to return their call are over. Lead Docket allows anyone to see every communication (call, email, or text) to a prospect in an easily digestible format. Anyone in the firm can open the case and know quickly what is going on.

> Anyone can jump into a file and see exactly where it's at, at any given time."

See how Filevine can help your firm grow with a free demonstration.
Call us at 801-657-5228.

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