

# DATA-DRIVEN LAW

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# Clients

# Cash

# Compensation

New Clients

Faster collection

Time management

More Clients

Flat fees?

Transparency

Faster intake

Online collections?

Firm goals?

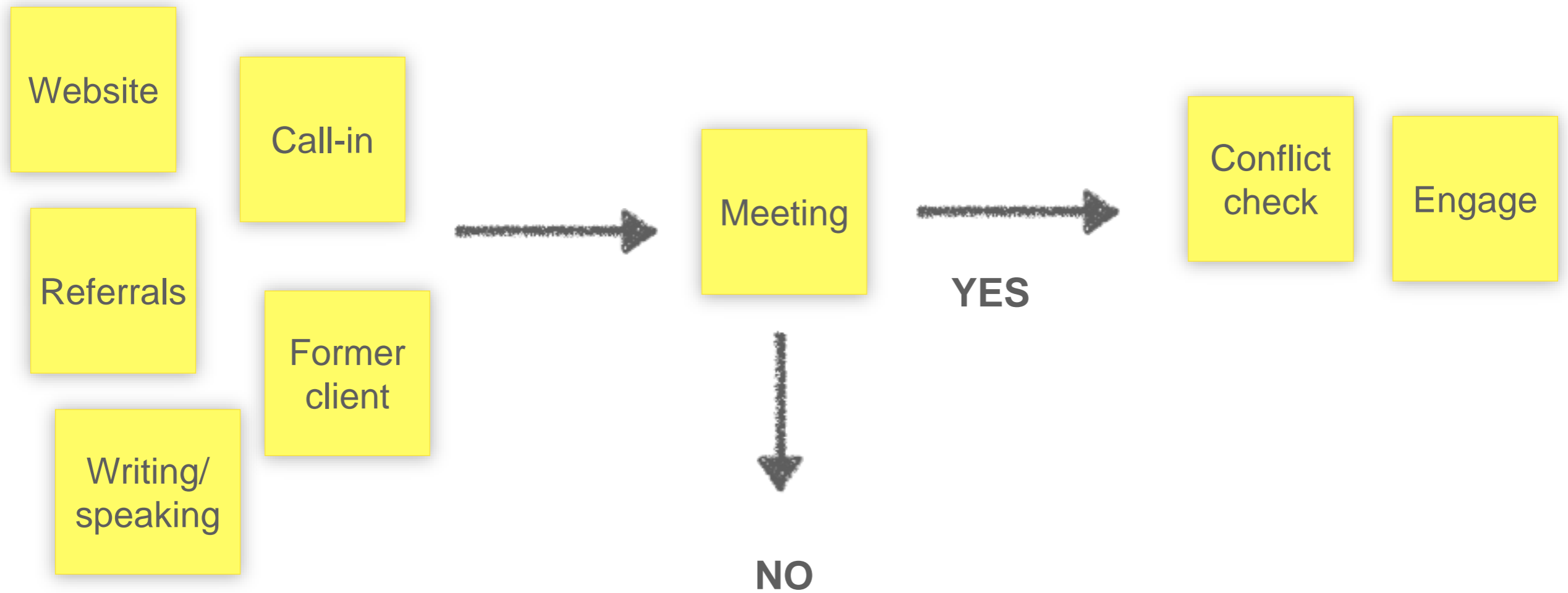
Ideal or all?

Personal goals?

Expectations?

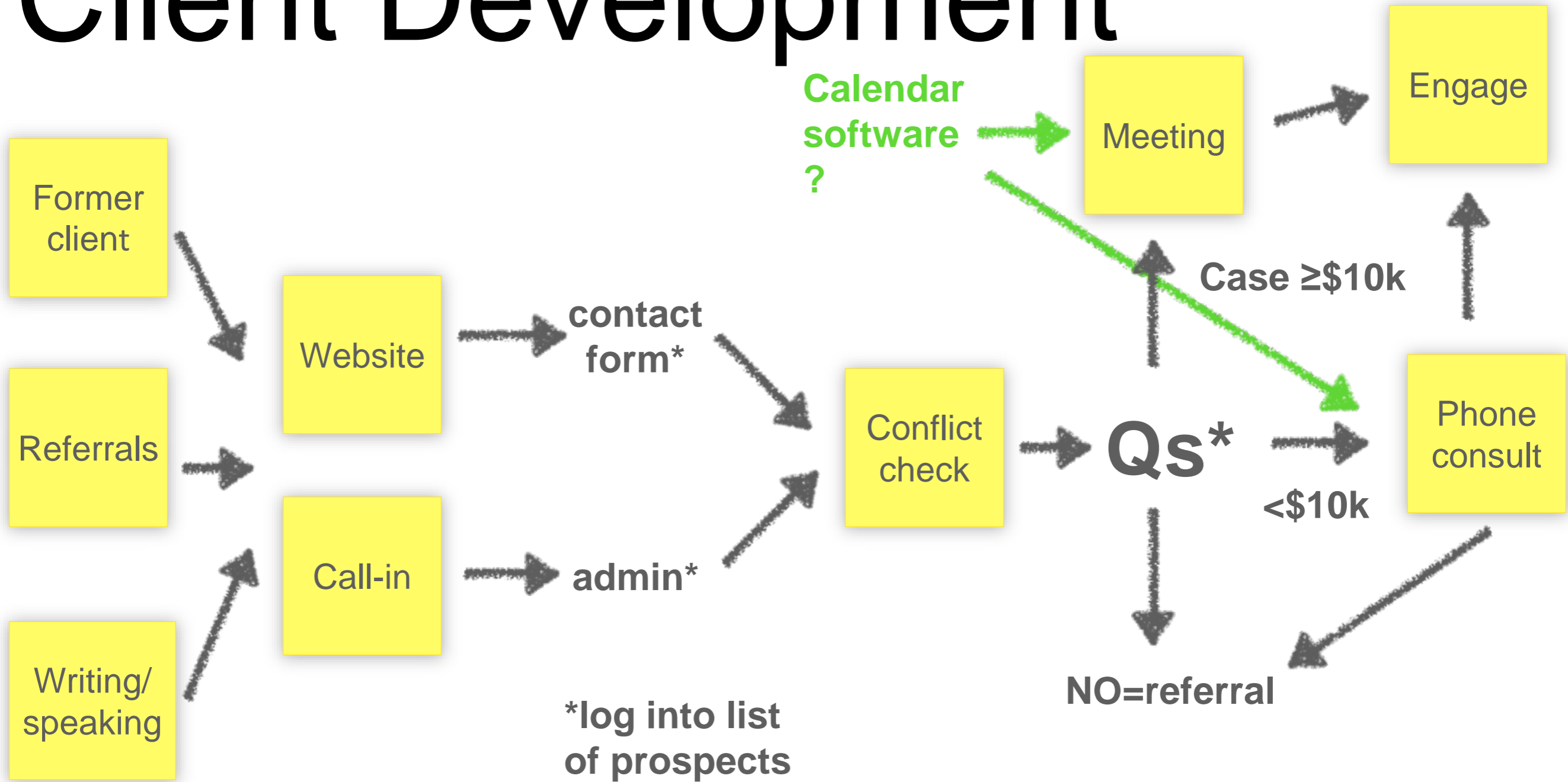
Satisfied?

# New Clients



NEW PROCESS

# Client Development



\*triage Qs by admin or paralegal

# visits w/ source

# calls w/ source

# consults

**new client**

website

paid consult (in person)

scope  
price

letter

# new matters

**engage**

call

phone consult (free)

matter hrs #  
timeline

source of new matter

**work**

new matter calendar

plan  
• who  
• hours  
• tech

drafts & reviews

time record

client (other?)  
sign-off

days WIP collect

**bill**

monthly

compare to budget

Profit

Survey

NPS

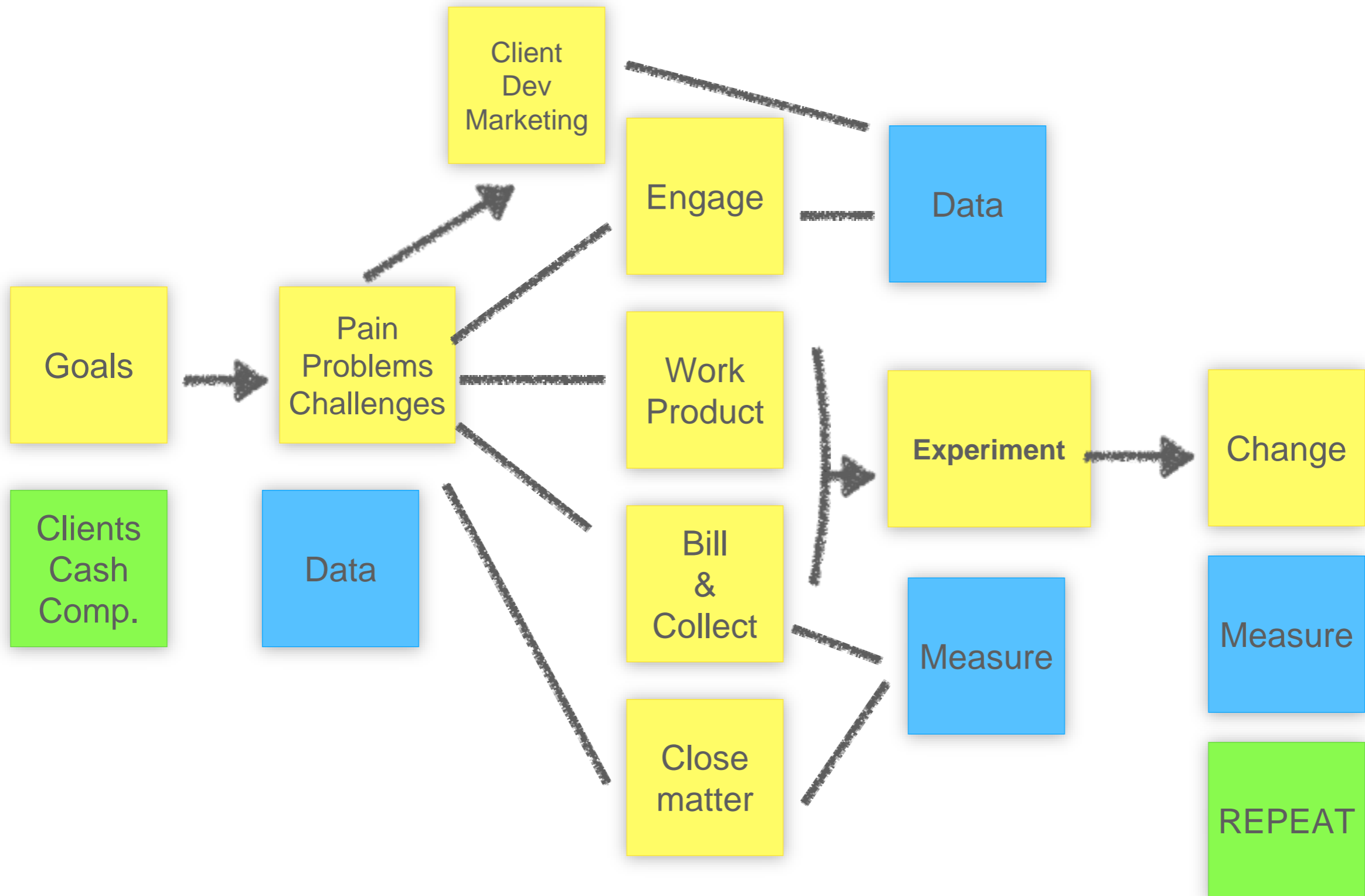
**close matter**

letter

survey

check-in email

# Approach



# Make a Plan

**Pick your biggest pain point**

**Design your survey or feedback -  
make it easy for clients (WPLG ex)**

**Test it on a small group (McCarthy  
Tetrault)**

**Don't be afraid to make changes  
(Modern Law)**



# Starter Spreadsheet

1 - CLIENT DEVELOPMENT			
1-CD (d)	Adjusted Prospect Pipeline (\$)	Total Adjusted Value of Prospective Clients' Matters/ Attorney	≥ \$X
Key Performance Indicators (KPIs)		Calculations	Target
2 - CLIENT ACQUISITION COSTS			
2-CAC (a)	Client Acquisition Cost (CAC) (\$)	Sales and marketing spend + opportunity cost of staff or lawyer time/# New Clients	≤ \$X
Key Performance Indicators (KPIs)		Calculations	Target
3- PRODUCTIVITY			
Key Performance Indicators (KPIs)		Calculations	Target
4- PROFITABILITY			
4-PROF (f)	Aging Tolerance (%)	Total Collected within 60 days/Total billings	≥ X%
Key Performance Indicators (KPIs)		Calculations	Target
5- PERFORMANCE			
5-PERF (a)	Billings Collected by Attorney (%)	Total \$ Collected by Attorney / Total \$ Billings by Attorney	≥X%
Key Performance Indicators (KPIs)		Calculations	Target
6- CLIENT EXPERIENCE			
6-CE (a)	Net Promoter Score (NPS) (%)	% of clients who are promoters less % of clients who are detractors	≥X%
Key Performance Indicators (KPIs)		Calculations	Target
7- FIRM CULTURE			