

Legal-specific CRM tools built for your modern law firm



CosmoLex CRM is intuitive, legal CRM (Client Relationship Management) software that is designed to help you grow your profits by tracking prospective clients and keeping your current clients engaged and returning for services.

CosmoLex CRM is built to enhance your daily use of CosmoLex practice management software, and gives you the additional tools you need to grow your law firm and maintain strong client relationships.

Develop Strong Client Relationships

01

Build for Success with the Right Tools

Having the right legal CRM tools in place is critical. Standard practice management software is not designed with lead management or client interactions in mind and generic CRM tools are simply not built for the way law firms work.

02

Streamline Client Follow-ups

Immediately send personalized, follow-up messages via email or text to your contacts. This means prospects feel like you're engaging directly with them and are less likely to look elsewhere just because you were unable to pick up the

03

Meet Your Clients Where They are with Text & Video Messaging

Send text and video messages to every client and prospect. Now, your firm can send personalized messages from a dedicated call-back number and your contacts can respond. You can even send e-signature requests via text message to clients and prospects.

Gain Efficiency with Automated Workflows & Reporting

1

Create a more efficient and effective marketing process by using automated workflows. From lead to successful client, you'll be able to track the progress of every contact at a glance. View reports of your productivity, case metrics, and new sign-ups in a single tool.

Grow Your Law Firm



2

Establish Automated Email Drip Campaigns

Send personalized messages directly to multiple contacts. Keep your leads warm with customizable emails and guide them on the journey to becoming happy, returning clients. productivity, case metrics, and new sign-ups in a single tool.

3

Create Text Messaging Campaigns

Nearly 98% of all text messages sent by law firms to their clients and prospects are read. Stay in front of prospective clients by sending automated text messages. Give your staff the tools to build text messages from their computers and send them directly to multiple contacts.

Improve Your Client Intake Process

Eliminate Wasted Time on Data Entry



Handle tedious client entry data entry tasks automatically so your staff can focus on billable work and client priorities. Save money and time by letting your legal CRM software manage your data entry.

Customize Online Forms



Build intuitive, mobile-friendly client intake forms for your prospects. Create forms to fit your law firm's needs with customizable branding and field properties. It's easy to build custom intake forms for every practice area or case type to ensure you're gathering the right information from clients every time.

One-Click Electronic Signature



Send documents and signature requests directly to clients. Streamlining the process for your staff and clients means you'll never have to waste time hunting down clients for a signature again, and signed documents are securely stored and sorted for easy recordkeeping.

See how CosmoLex CRM can help you grow your law firm and maintain strong client relationships, contact your customer success representative for pricing or to schedule a demo.