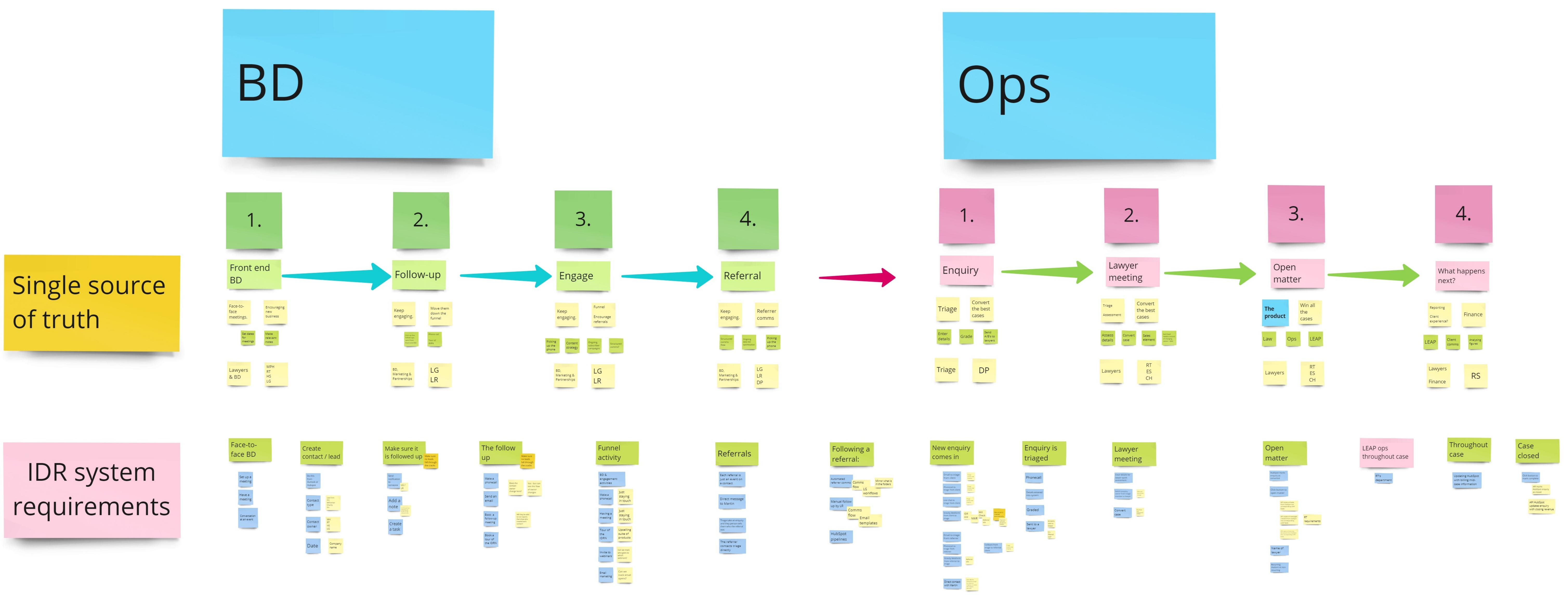
Overall business flow

Next page



Fill in the blanks

Wireframes

Wireframes are rough sketches of the different dashboards and pages that would be required to carry out the above flow through the business.

They don't look exactly like the CRM/HubSpot will look, but just show clearly the information that each department may require on each page to run their area of the business.

The purpose of the wireframes is so all teams and departments can see exactly how the CRM will work, and plan exactly what information should be displayed on each page to carry out roles and tasks.

These wireframes are a rough start that each department can build on to plan what they would like on each dashboard.

When the information and dashboards are planned, the wireframes will be updated and become the blueprint for how HubSpot / Contra build the CRM.

They are just the instructions for how the CRM should be set up, so everyone can plan together as a firm what each page should look like before giving the final brief to HubSpot.

All fields / data / information points shown on these wireframes are changeable - they are just a starting point.

In order to complete the brief for implementing HubSpot, all teams would need to collaborate to identify the most important information on each page, and meet up to finalise the wireframes.

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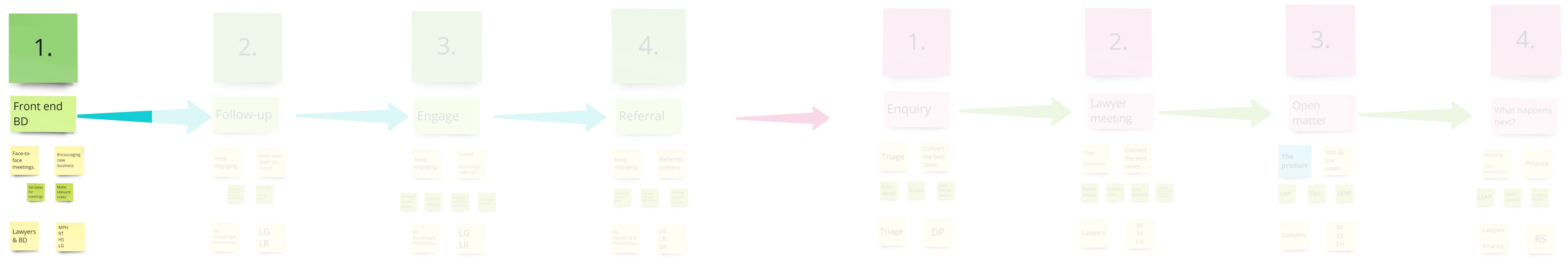
BD Front-liners

Next page



Purpose: Keep all BD activity in a single source of truth so anyone can follow-up to any activity and nothing falls through the cracks.

Tasks overview

1. Setting up meetings with BD contacts
2. Holding meetings with BD contacts
3. Off-the cuff conversations at events
4. Cold emails / reaching out on LinkedIn

Tech tasks

1. Outlook - track emails
2. Create new contact
3. Search for, locate and update existing contact
4. Forward to follow-up team **LG / LR**
5. Create tasks for follow-up team **LG / LR**

Outlook

✓ Track email

Any BD related email,

Create new contact

Any comms with any brand new leads.

Create a new contact which will become their permanent record in CRM.

Update existing contact

Any new comms with any existing contacts.

Search for contact, add any new communications or tasks to their contact for follow-up team to act upon.

Forward to team

Any team member who needs to be aware of this interaction can be notified by email.

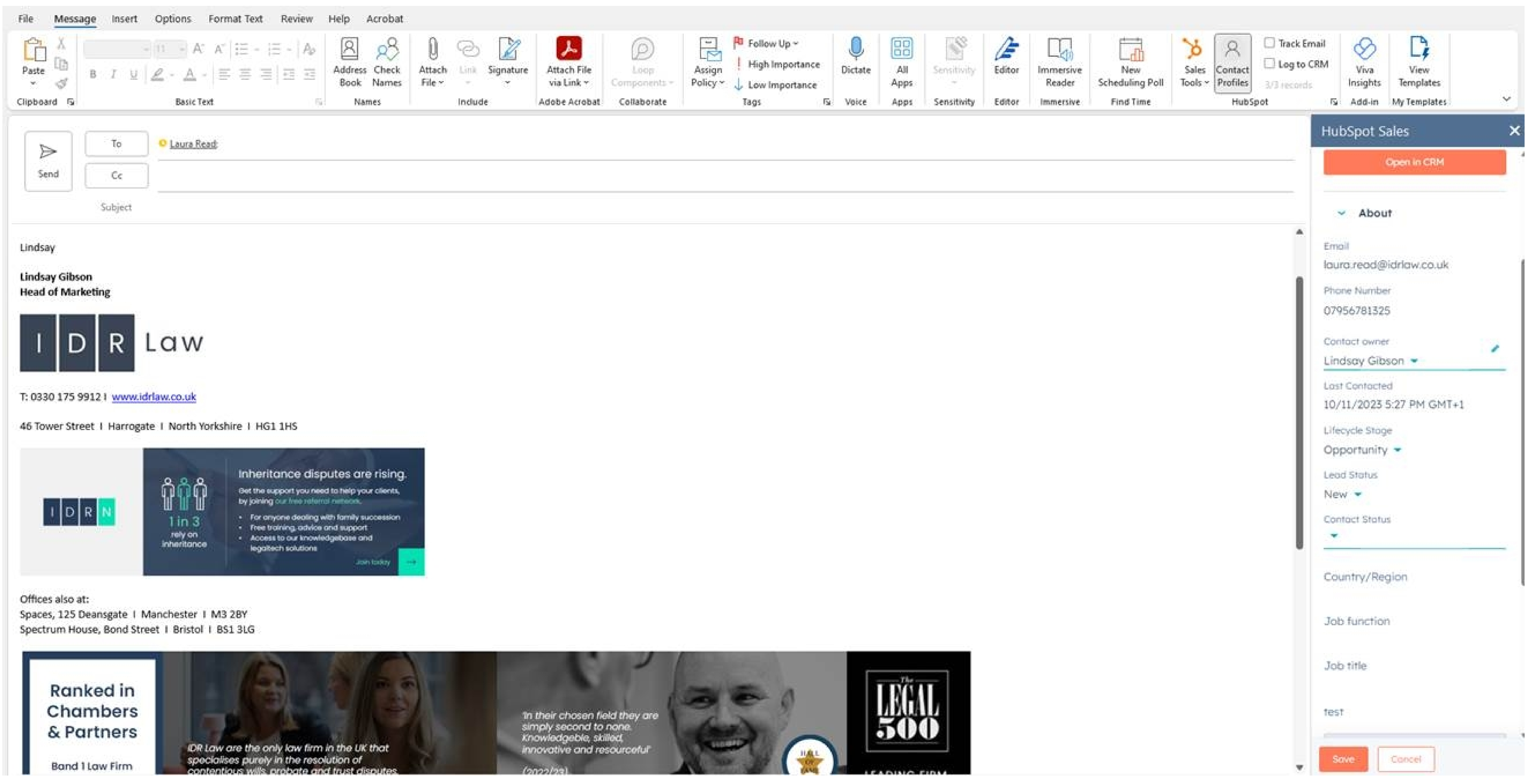
E.G. Can LR send them a referrer pack?

Create task

Create any specific tasks relating to this contact that need carrying out.

E.G. Book an IDRN Tour

**Dummy mock-up. Actual screen below*



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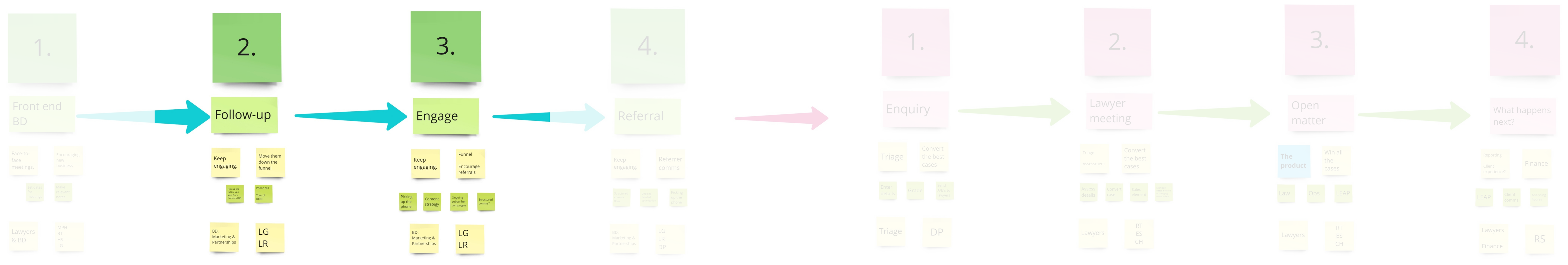
Single contact page

Next page



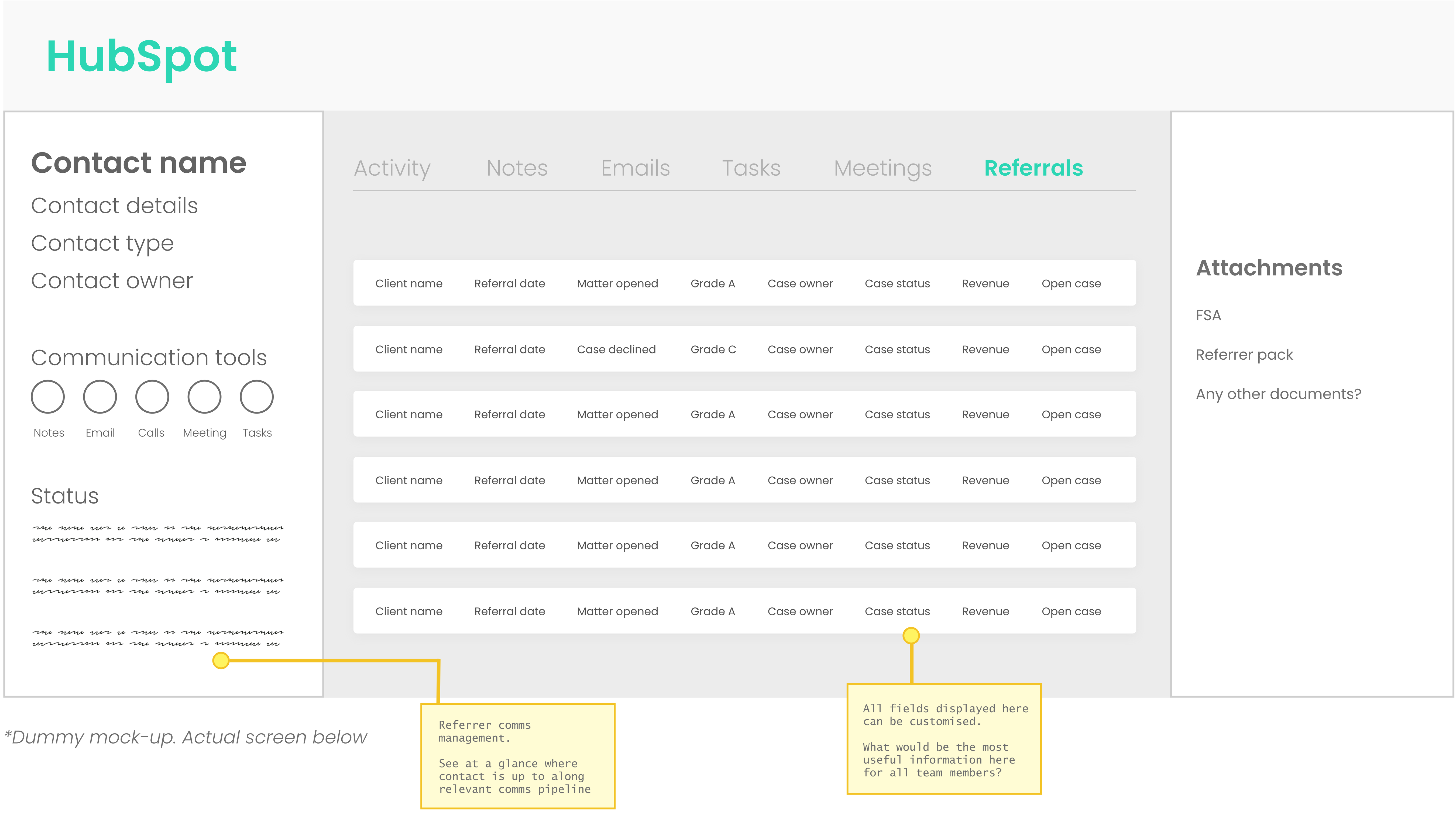
Purpose: Single source of truth for a contact

Tasks overview

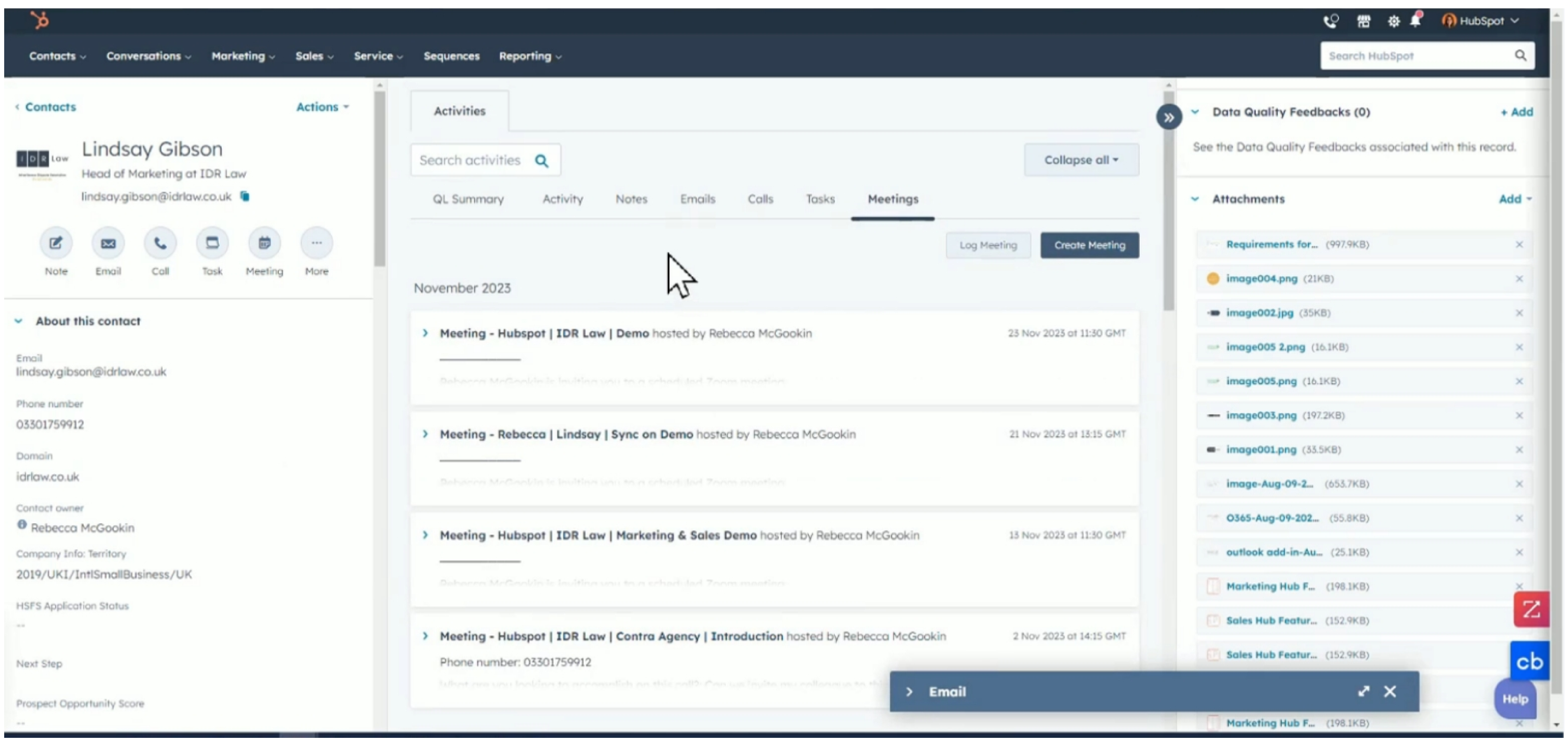
1. Get an overview of the contacts activity
2. See all comms with this contact
3. See all referrals made by this contact
4. Manage communications
5. Manage pipeline / referrer comms

Tech tasks

1. Send, receive and manage comms
2. Create tasks



Dummy mock-up. Actual screen below



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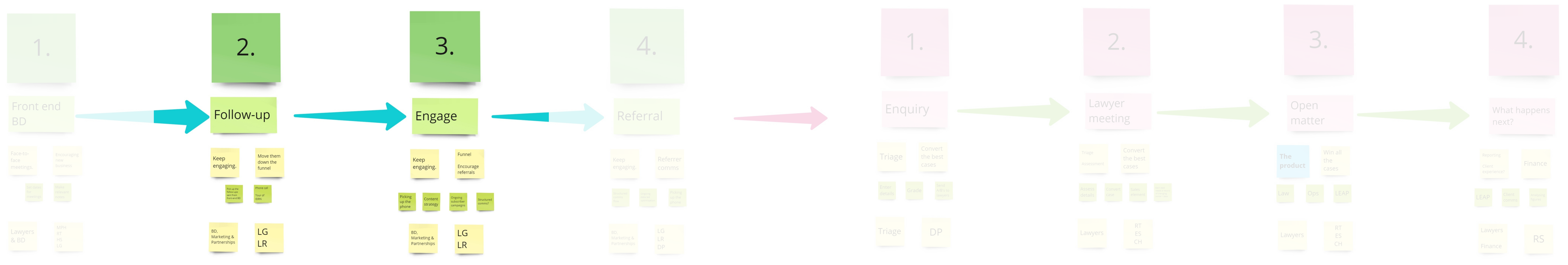
Latest BD tasks

Next page



Purpose: Follow-up / engage team can check daily to see where everything is up to and what needs doing

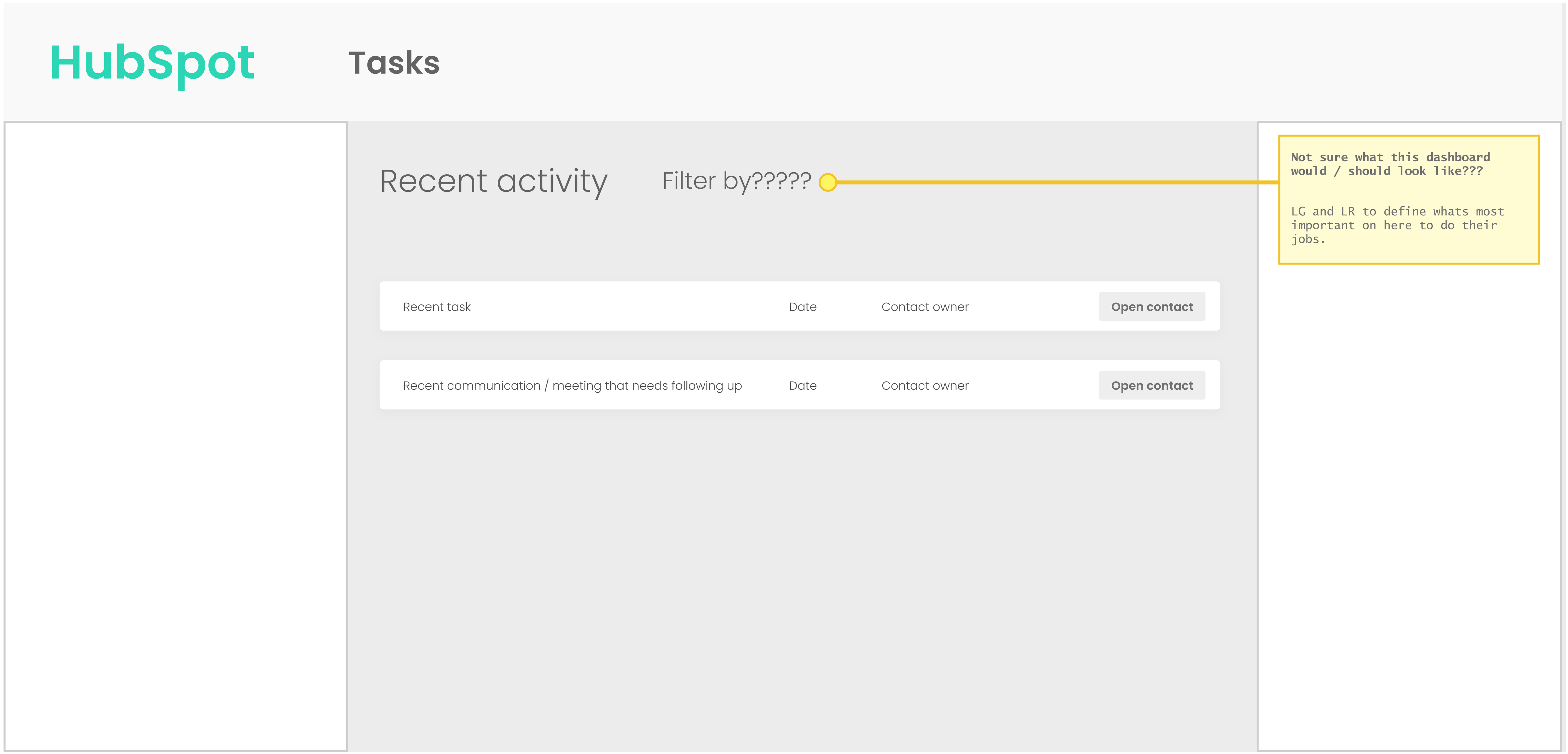
Make sure nothing from the front-line falls through the cracks

Tasks overview

1. Check latest tasks from front-liners
2. See who needs following up
3. Prioritise most important tasks / comms
4. Keep engaging
5. Move them down the funnel
6. Encourage joining IDRN

Tech tasks

1. Filter tasks and recent comms to identify most important jobs of the day/week
2. Check the dashboard to recent BD activities
3. Email contacts / leads
4. Set up meetings with new leads
5. Engage with marketing / IDRN etc.



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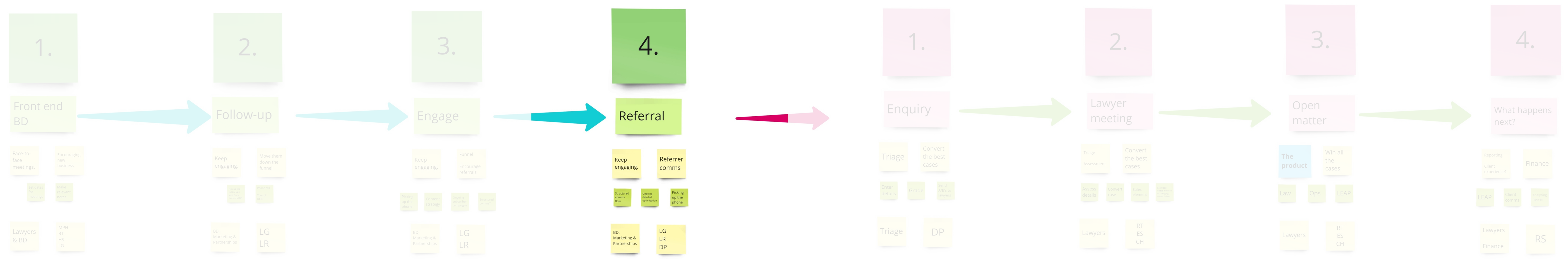
BD recent referrals dashboard

Next page



Purpose: See all recent referrals at a glance

Geared around helping Partnerships team keep on top of all referrer comms, both manual and automated flows

Improve referrer experience

Tasks overview

1. See all recent referrals
2. Make sure they receive engagement comms
3. Basically a list of all enquiries that came from a referrer

Tech tasks

1. See at a glance the status of recent referrals
2. Open referrer contact to keep track of where they are up to on the referrer comms pipeline

HubSpot Contacts / BD Leads / Referrers

Useful links?

- Pipelines
- Comms templates
- Training

Filters Filter by?????

Name	Firm	Type	Date of referral	Grade	Referral status	Subscriber	
John Smith	Law & Co.	Law Firm	14/07/23	A	Case opened	Yes	Open contact
John Smith	Law & Co.	Law Firm	14/07/23	B	Interview booked	Yes	Open contact
John Smith	Law & Co.	Law Firm	14/07/23	C	Declined	Yes	Open contact
John Smith	Law & Co.	Law Firm	14/07/23	A	Case opened	Yes	Open contact
John Smith	Law & Co.	Law Firm	14/07/23	A	Case opened	Yes	Open contact
John Smith	Law & Co.	Law Firm	14/07/23	A	Case opened	Yes	Open contact

What filtering requirements would be useful?

All converted

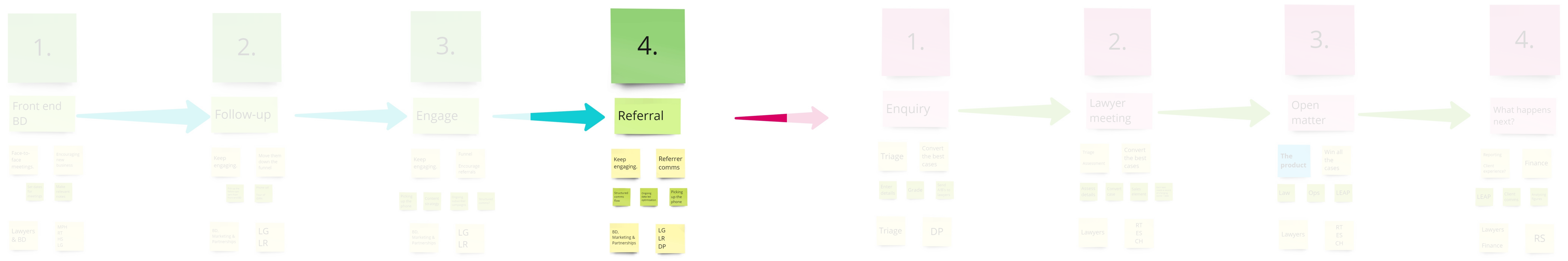
All declined

Still at enquiry stage

Next page

BD referrer tracker

Next page



Purpose: Check on status of referrers / referral stats.

Geared towards analysing and measuring referral trends over time

Tasks overview

1. Keep track of the best referrers - take action
2. Keep track of the worst referrers - take action
3. See how referrers are growing / dropping off
4. Easily access all important referrers

Tech tasks

1. Filter referrals to see success over time

HubSpot Contacts / BD Leads / Referrers

Filters

Filter by?????

Name	Firm	Type	Number of referrals	Referral value	Subscriber	
John Smith	Law & Co.	Law Firm	23	£115,203	Yes	Open contact
John Smith	Law & Co.	Will writer	19	£124,094	No	Open contact
John Smith	Law & Co.	Law Firm	23	£115,203	Yes	Open contact
John Smith	Law & Co.	Law Firm	23	£115,203	Yes	Open contact
John Smith	Law & Co.	Law Firm	23	£115,203	Yes	Open contact
John Smith	Law & Co.	Law Firm	23	£115,203	Yes	Open contact

Possible ways to filter referrals

Last three months referrals

Last six months referrals

Last years referrals

Sort by recency of referral (show the latest referrers)

Sort by number of referrals

Sort by value of referrals

Sort by subscriber status

Sort by contact type

Sort by enquiry grade????

Sort by conversions vs declines??

Show contacts with <1 referrals (show contacts who haven't made a referral yet)

```
This is how you would see the
original audiences:

sub-non ref [<1 refs, sub]
non-sub ref [>0 refs, non-sub]
sub ref     [>0 refs, sub]


So you could easily see which
referrers were / were not IDRN
subscribers,

And which subscribers haven't
referred yet.

Basically, are they a
subscriber?
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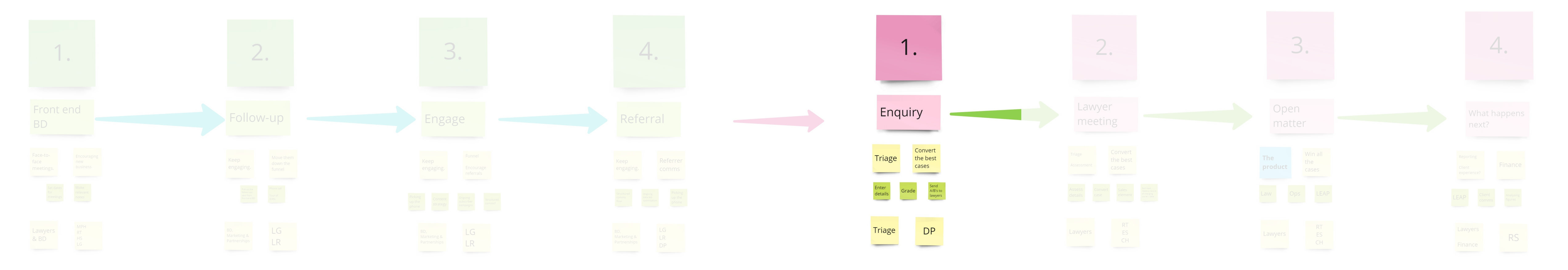
New enquiry page

Next page



Purpose: Form for entering new enquiry details.

TBC

Gravity forms

Gravity Forms is the platform on which the Claim Checker is built, and it integrates seamlessly and easily with HubSpot.

Following completion of the Charity CC, any form can be created with no extra dev cost.

In the same way that the Claim Checker assess the merit of a 1975 claim, any form could be created that provides a rough pre-triage grading, which could be displayed clearly on any HubSpot dashboard or page. Useful for triage?

RT mentioned the Charity CC entries having useful information which helped easily assess the case. Expanding on this, we could set up any form to gather any information that would help triage and legal teams in their day-to-day assessment of enquiries.

Different forms could be created and tailored for the different routes to triage, showing the most useful information to see at a glance the nature of the case, with a clear pre-grading (A,B,C).

Routes to triage via unique Gravity forms

All these Gravity forms in blue could be configured to pre-grade enquiries and collect only most useful information for triage / legal teams.

All data passed straight into HubSpot CRM & dashboards.

IDR website

Charity CC

NWR

Society of Will writers

V2 Claim Checker, wherever it is hosted

Will Check

Referrers

Most important referrers could have their own unique Gravity Form tailored to their requirements.

These Gravity forms could be used to train referrers where required - so they understand which cases should or shouldn't be sent??

IDRN contact form

Triage

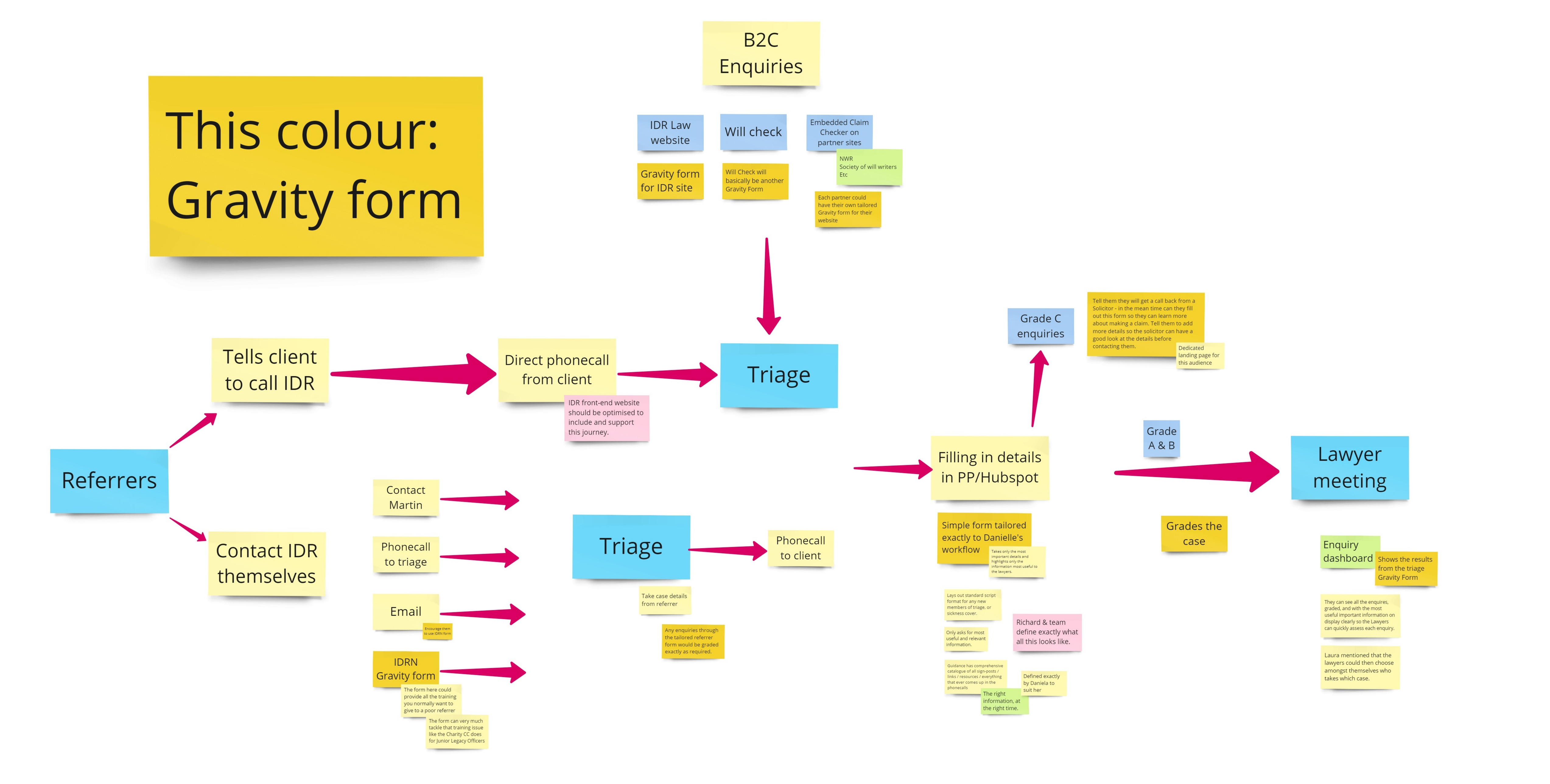
Streamline triage

Pre-grade cases for legal teams

Define enquiry call structure for new staff / sickness cover

Triage Gravity form

Legal teams



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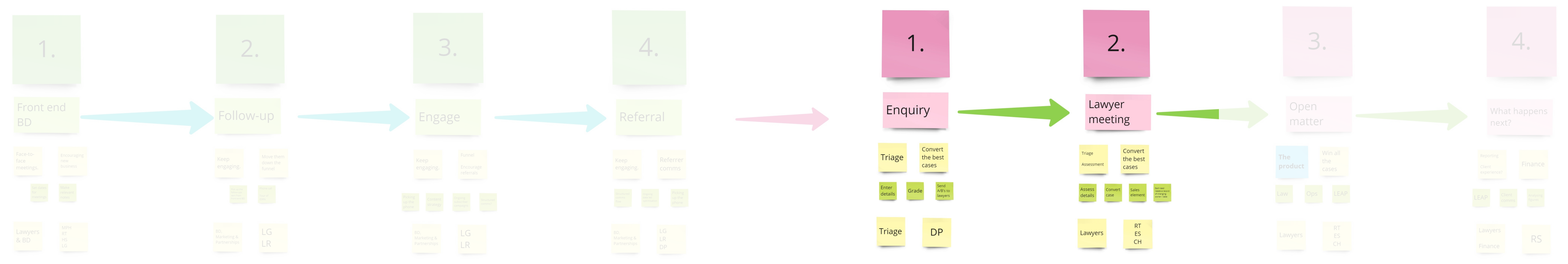
Enquiry page

Next page



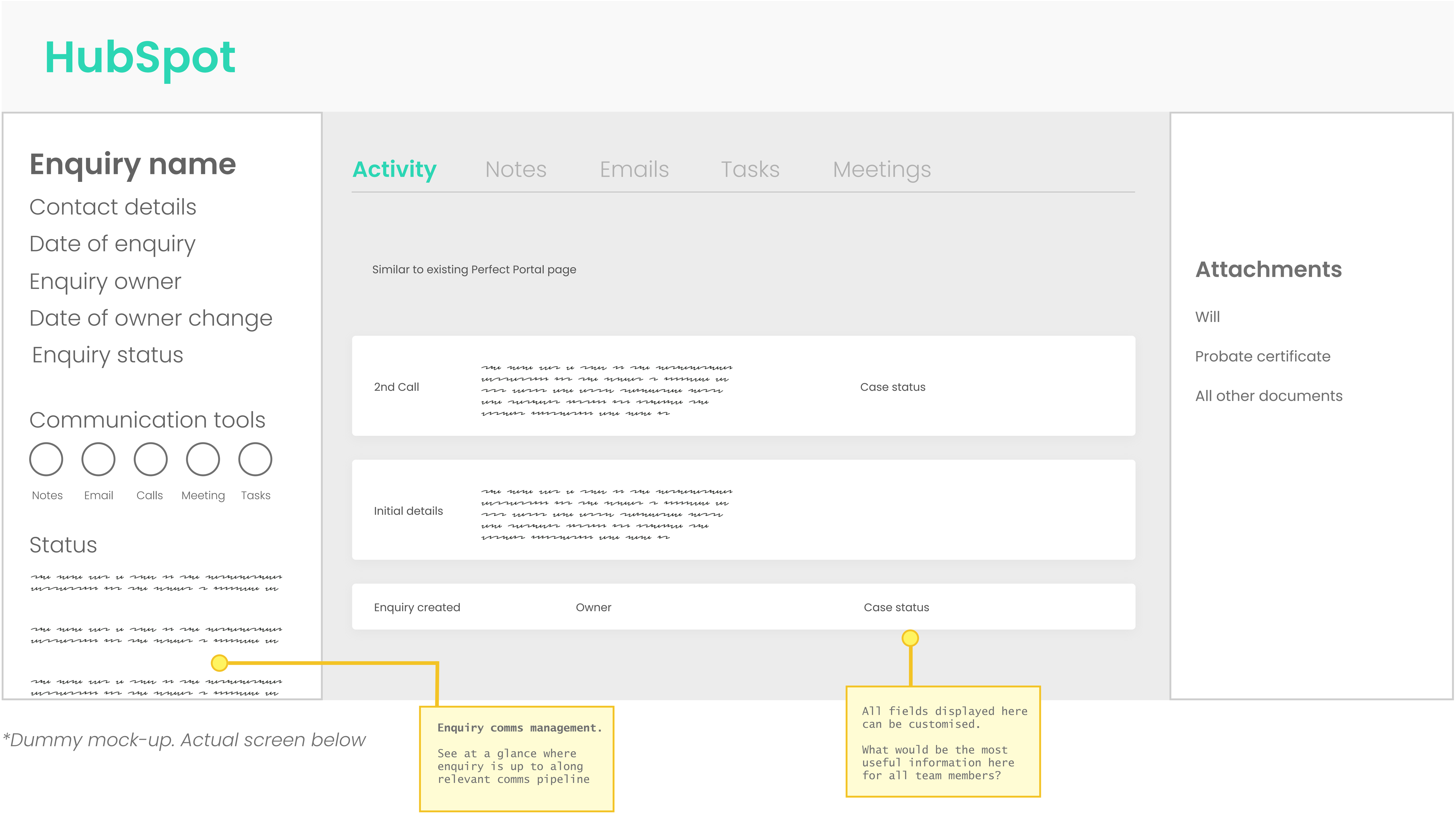
Purpose: Single source of truth for an enquiry for triage and legal teams

Tasks overview

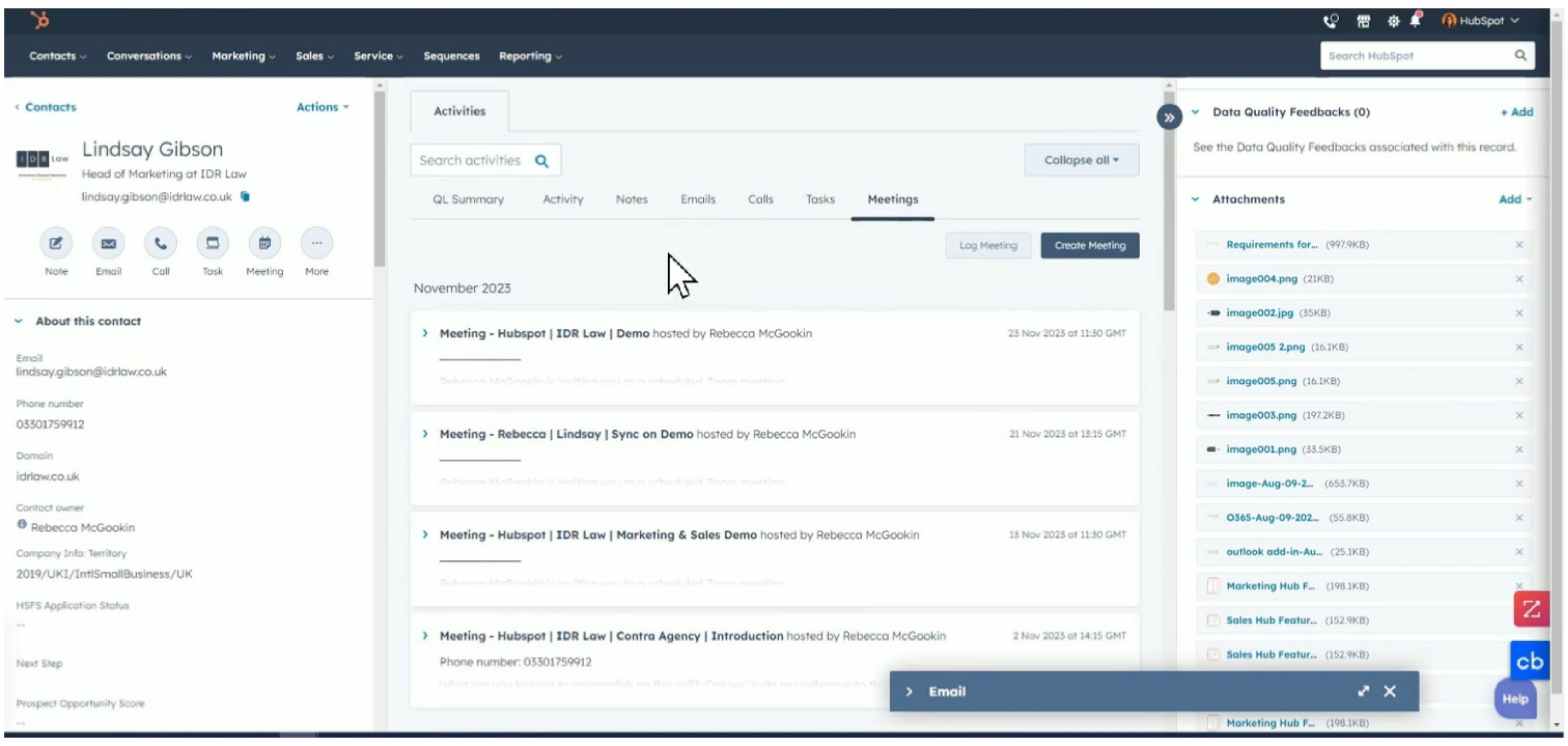
1. Get an overview of the enquiry activity
2. See all comms with this enquiry
3. See who referred this enquiry
4. Manage communications
5. Manage pipeline / enquiry comms

Tech tasks

1. Send, receive and manage comms
2. Create tasks
3. Assign new enquiry owner
4. View date of owner change



*Dummy mock-up. Actual screen below



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Enquiries dashboard

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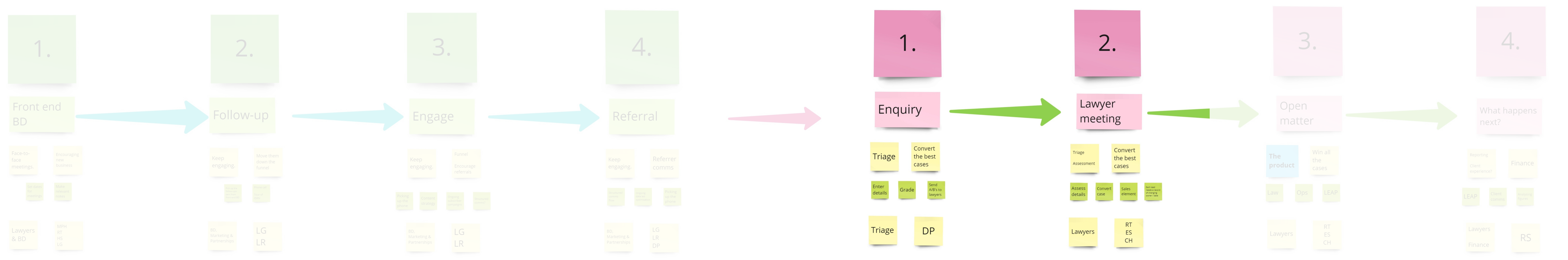


Purpose: Single source of truth for all current enquiries for triage and legal teams.

Shows all enquiries up until matter opened or declined

Geared around helping teams convert the best enquiries

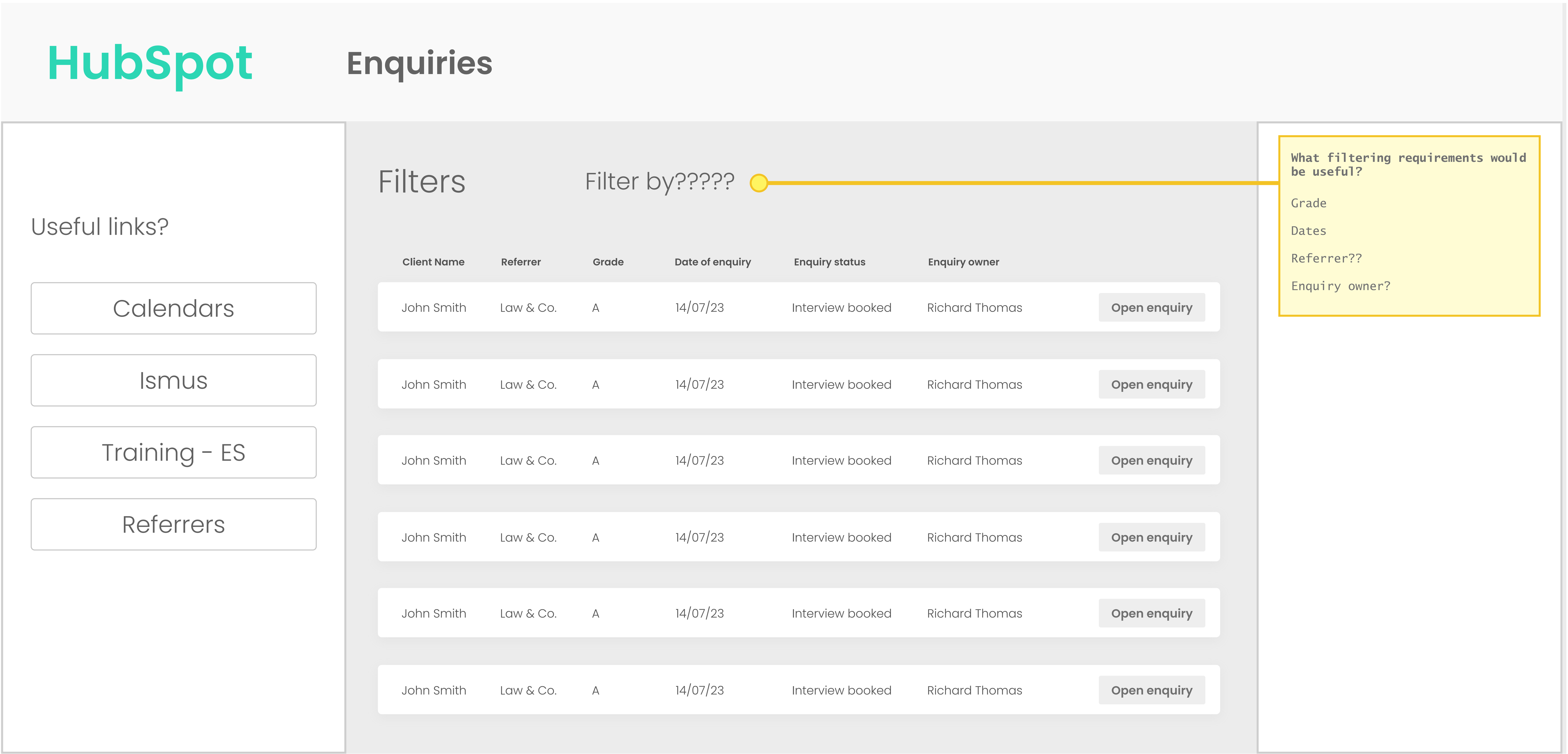
See at a glance the grade of the enquiries

Tasks overview

1. Get an overview of all recent enquiries
2. Manage booking interviews
3. Help getting all the best cases get converted

Tech tasks

1. Open enquiries
2. Filter / search enquiries



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Further dashboards??

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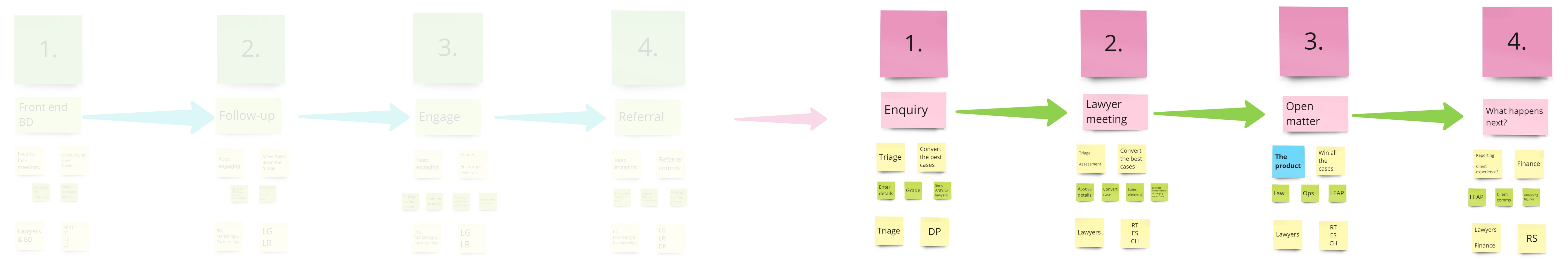

Any more? Current open matters? (Would require CRM/LEAP connection)

Financial dashboard - All current open cases + all closed cases with revenue?

ALL enquires including converted matters + declined cases (Comprehensive list of all enquiries ever)

Any more?

Next page

Latest enquires

Name	Nature of dispute	Estate size	Intention of claimant	Is there a will?
John Smith	Left out of will, will invalid	£150,000 - £500,000	Pursue claim	Yes
Jane Doe	Promises not kept	£0 - £150,000	Gathering info	Yes
Jack Jones	Not what they wanted	£0 - £150,000	Gathering info	No
Jemima Puddleduck	Information withheld	£1,000,000 +	Legal action	No

This is just a dummy mock up to demonstrate the results of the last survey.

All other required fields would also be on this dashboard, such as:

Date, Owner, Lead source, Referrer, appointment booked, matter opened / declined, closing revenue, etc.

You can have as many as you want.

And you can filter the enquiries, for example: only show estate values over £500,000

And following the first meetings with the agency who are onboarding the new CRM, we have seen how easy it is to configure these dashboards - so nothing is set in stone, and if you wanted, you could try new options for how the enquiry details are shown on this dashboard, as often as you want.

And if you click on an enquiry it opens the individual enquiry page, which shows all the details anyway