

# The Law Firm Client Intake Playbook

A comprehensive guide to optimizing client intake  
with AI voice automation for legal practices.

**ClearTalk AI**

Legal Edition

# The Intake Problem

## Why Law Firms Lose Leads

The legal industry faces a unique challenge: potential clients often reach out during their most stressful moments—after an accident, during a divorce, or when facing criminal charges. They need help now, not tomorrow.

### The 5-Minute Rule

Law firms that respond to inquiries within 5 minutes are 100x more likely to connect with the potential client than those who respond within 30 minutes. Yet most firms take hours or even days to return calls.

## The Cost of Slow Response

- 67% of callers who reach voicemail will call a competitor instead
- Average potential case value for PI firms: \$15,000-50,000
- Even a 10% improvement in intake can mean \$100K+ annually
- After-hours calls represent 35-40% of all legal inquiries

## Common Intake Challenges

- Receptionist overwhelmed during business hours
- No coverage for nights, weekends, or holidays
- Inconsistent qualification of potential clients
- Conflict checks delayed, causing compliance issues
- Fee discussions handled inconsistently
- No systematic follow-up on missed calls

# AI Voice for Legal Intake

## How It Works

AI voice agents can handle the initial intake process for law firms, gathering essential information and qualifying potential clients 24/7 while maintaining full compliance with legal and ethical requirements.

## The AI Intake Flow

- ' 1. Greeting and case type identification
- ' 2. Basic information gathering (name, contact, incident details)
- ' 3. Initial qualification questions based on practice area
- ' 4. Conflict check initiation (name, parties involved)
- ' 5. Appointment scheduling with appropriate attorney
- ' 6. Follow-up information sent via email/text

## Compliance Considerations

### Attorney-Client Privilege

AI intake systems must be configured to protect privileged communications. This means secure data storage, proper access controls, and clear disclosures about how information is handled.

### Unauthorized Practice of Law

The AI should gather information and schedule consultations but never provide legal advice. Scripts must be carefully crafted to avoid any appearance of practicing law.

### Conflict Checking

The AI can initiate conflict checks by gathering names of all parties involved, but final conflict clearance must be performed by the firm before any substantive conversation.

### **Important Note**

Always consult with your state bar's ethics hotline when implementing new intake technologies to ensure compliance with local rules of professional conduct.

# Sample Intake Scripts

## Personal Injury Intake Script

AI: "Thank you for calling [Firm Name]. My name is Sarah, and I'm here to help connect you with one of our attorneys. Are you calling about a personal injury matter?"

[If yes]

AI: "I'm sorry to hear you're going through this. To help our attorneys prepare to assist you, I'd like to gather some basic information. First, can you tell me your name?"

[After gathering name]

AI: "Thank you, [Name]. Can you briefly describe what happened and when the incident occurred?"

[After description]

AI: "I understand. Have you sought medical treatment for your injuries?"

[Continue with qualifying questions...]

## Family Law Intake Script

AI: "Thank you for calling [Firm Name]. I'm here to help connect you with one of our family law attorneys. What type of family matter can we help you with today?"

[Options: Divorce, Custody, Support, Other]

AI: "I understand this can be a difficult time. To help our attorneys prepare, I need to gather some basic information. May I have your name?"

AI: "And your spouse's or the other party's name? This helps us check for any conflicts of interest."

[Continue with qualifying questions...]

# Implementation Checklist

## Pre-Launch Checklist

- Review state bar ethics rules on technology and intake
- Draft compliant intake scripts for each practice area
- Configure conflict check workflow
- Set up CRM integration (Clio, MyCase, PracticePanther)
- Define escalation paths for urgent matters
- Train attorneys on the new intake process
- Create follow-up email/text templates
- Test the system with sample calls

## Post-Launch Monitoring

- Review call transcripts daily for the first week
- Track conversion rate from call to consultation
- Monitor customer satisfaction scores
- Refine scripts based on common questions
- Ensure conflict checks are being completed
- Verify appointments are being scheduled correctly

## Ready to Transform Your Intake?

Book a demo to see how ClearTalk AI can help your law firm capture more clients.

[Visit cleartalk.ai/demo](https://cleartalk.ai/demo)

