



FREE INTAKE DIAGNOSTIC

# The “Why Am I Still Babysitting My Firm?” Intake Scorecard

Find the exact points where your firm is losing cases and why everything still depends on you.



BUILT FOR LAW FIRM OWNERS

## START HERE

# Your firm probably looks fine from the outside.

From the outside, your firm probably looks fine. The website is live. The phones ring. Leads come in. The team is “handling it.” Very comforting. Very suspicious.

Inside, you may be doing the part no owner wants to admit: checking whether calls were returned, asking if someone followed up, wondering why a strong lead went quiet, and quietly re-doing work that was technically assigned to someone else.

This scorecard is not here to teach intake theory. It is here to show where the breakdown actually is: **speed, follow-up, coverage, ownership, and trust.** Those are the places revenue leaks before anyone calls it a problem.

**This takes about 5–7 minutes.** Answer honestly. No one’s grading you... except your revenue.

## How to score

**Circle one answer per row.** Use the point value at the top of that column: **3 points** for strong/consistent, **2 points** for partial/inconsistent, and **0 points** for missing or unreliable. Each section has 5 questions, so each section is worth up to **15 points**. Add all five section totals for a final score out of **75**.



# 1

## Speed to Lead

Speed is not a personality trait. It is an operating system.

**Relevant reality check:** Clio reports that 79% of legal consumers say a lawyer responding to the first call or email right away is one of the most important factors they look for. The classic Lead Response Management study puts the best connection window at roughly five minutes.

QUESTION	3 PTS	2 PTS	0 PTS
How quickly are new leads contacted after first inquiry?	<input type="radio"/> Within 5 minutes	<input type="radio"/> Within 30 minutes	<input type="radio"/> Same day or later
Are calls answered live during business hours?	<input type="radio"/> Always	<input type="radio"/> Sometimes	<input type="radio"/> Often missed
Are web form submissions routed immediately?	<input type="radio"/> Yes, automatically	<input type="radio"/> Someone has to notice	<input type="radio"/> No clear routing
Are missed calls returned quickly?	<input type="radio"/> Within 10 minutes	<input type="radio"/> Within a few hours	<input type="radio"/> Whenever
Does the first response include a clear next step?	<input type="radio"/> Always	<input type="radio"/> Usually	<input type="radio"/> Not consistently

**What this means:** If speed depends on whoever happens to be available, your marketing budget is funding a scavenger hunt.

# 2

## Follow-Up Consistency

Most firms do not lose leads because they never followed up. They lose them because they followed up once, felt productive, and then let the lead drift into the swamp.

QUESTION	3 PTS	2 PTS	0 PTS
How many follow-up attempts are made per lead?	<input type="radio"/> 5+ attempts	<input type="radio"/> 3–4 attempts	<input type="radio"/> 1–2 attempts
Is there a defined follow-up schedule?	<input type="radio"/> Documented and used	<input type="radio"/> Informal but followed	<input type="radio"/> No real schedule
Does follow-up use multiple channels?	<input type="radio"/> Phone, text, email	<input type="radio"/> Two channels	<input type="radio"/> One channel only
Are follow-up attempts logged?	<input type="radio"/> Always	<input type="radio"/> Sometimes	<input type="radio"/> Rarely
Does follow-up stop because the lead is unqualified, or because people forget?	<input type="radio"/> Clear qualification reason	<input type="radio"/> Mixed	<input type="radio"/> People forget

**What this means:** Follow-up is where “busy” firms quietly become expensive firms. The lead did not ghost you. Your process blinked first.

# 3

## After-Hours & Coverage Gaps

Legal problems are inconsiderate. They do not wait for your receptionist's lunch break.

QUESTION	3	2	0
What happens to leads after hours?	<input type="radio"/> Live coverage	<input type="radio"/> Next-day callback	<input type="radio"/> Voicemail only
Are weekends covered?	<input type="radio"/> Yes	<input type="radio"/> Limited	<input type="radio"/> No
Are urgent inquiries flagged?	<input type="radio"/> Always	<input type="radio"/> Sometimes	<input type="radio"/> No system
Is there backup when intake is unavailable?	<input type="radio"/> Clearly assigned	<input type="radio"/> Informal	<input type="radio"/> No backup
Are after-hours leads tracked separately?	<input type="radio"/> Yes	<input type="radio"/> Sometimes	<input type="radio"/> No

**What this means:** If your system disappears after 5 p.m., so do some of your best opportunities.

# 4

## Ownership & Accountability

A lead without an owner is not "in progress." It is wandering the building with a tiny briefcase.

QUESTION	3	2	0
Is it clear who owns each lead?	<input type="radio"/> Always	<input type="radio"/> Usually	<input type="radio"/> Not really
Are tasks tracked in a system?	<input type="radio"/> Visible and current	<input type="radio"/> Partially	<input type="radio"/> Mostly assumed
Are status changes documented?	<input type="radio"/> Always	<input type="radio"/> Sometimes	<input type="radio"/> Rarely
Do leads sit because everyone thought someone else had it?	<input type="radio"/> Rarely	<input type="radio"/> Occasionally	<input type="radio"/> Yes, somehow
Do you personally check status during the week?	<input type="radio"/> Rarely	<input type="radio"/> Sometimes	<input type="radio"/> Constantly

**What this means:** If you have to ask, it's not owned.

5

# Visibility & Trust

This is the uncomfortable one. Your intake process is only as strong as your ability to stop hovering over it. If the system works only when you are watching, you do not have a system. You have surveillance with a law degree.

QUESTION	3 PTS	2 PTS	0 PTS
Do you trust your intake process without checking?	<input type="radio"/> Yes	<input type="radio"/> Mostly	<input type="radio"/> No
Do you review call logs or lead activity at night?	<input type="radio"/> Rarely	<input type="radio"/> Sometimes	<input type="radio"/> Regularly
Do you re-check work already assigned?	<input type="radio"/> Rarely	<input type="radio"/> Sometimes	<input type="radio"/> Often
Can you see pipeline status at a glance?	<input type="radio"/> Yes, clearly	<input type="radio"/> Sort of	<input type="radio"/> No
Can your team explain what happened to any lead without a forensic investigation?	<input type="radio"/> Yes	<input type="radio"/> Usually	<input type="radio"/> Someone starts digging

**What this means:** This section is not about tools. It is about whether your firm can function without turning you into the intake department's emotional support partner.

# Score Breakdown

Add your total score across all five sections. Maximum score: **75**.

**Quick math:** one circled answer per row, five rows per section. Add the column points for each section, then add the five section totals. A high score means the intake system is working without constant owner rescue. A low score means the leak is operational, not motivational.

<b>0–20</b>	<b>You don't have a system. You have a hope strategy.</b>	Leads are being handled by memory, mood, and whoever is least underwater.
<b>21–40</b>	<b>Things work... until they don't. You're still the safety net.</b>	The firm can function, but the process depends too much on individual effort and owner intervention.
<b>41–60</b>	<b>Solid foundation, but still dependent on you.</b>	The basics are in place, but visibility, follow-up, or coverage gaps are still making you babysit.
<b>61+</b>	<b>Your firm runs. You don't babysit.</b>	Intake is tracked, accountable, and fast enough that you can stop playing lead detective.

**The point is not to get a perfect score. The point is to know where the leak is before your next marketing dollar falls into it.**

## The Cost of Babysitting Your Firm

Missed calls become lost cases. Slow follow-up turns paid traffic into a donation to your competitors. Coverage gaps create invisible revenue loss, which is the most annoying kind because it usually comes with a clean dashboard and a vague sense that “something feels off.”

### Quick estimate exercise

If you miss just **3 calls per week**, and **1 would have converted into a \$5,000 case**, that is:

**\$15,000/month**

That math is not dramatic. It is just rude.

## If your firm only works when you're watching it, that's the problem.

Attorney Assistant helps law firms fix intake, follow-up, and coverage without replacing their team.

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