

Audit Your Intake: *The 10-Minute Test* That Shows Where You're Losing Cases

Most law firms think they need more leads.

They actually need to stop losing the ones they already paid for.

THE REAL PROBLEM

**You don't have a lead problem.
You have an *operations* problem.**

Every dollar you spend on marketing assumes someone is ready to catch the lead on the other end. Most firms aren't. The intake process — the moment between a prospect reaching out and a case being booked — is where revenue disappears quietly, every single day.

This isn't a theory. It's a pattern we see across firms of every size and practice area.

20-40%

of inbound opportunities lost
before a conversation even
starts

15 min

maximum response window
before lead quality drops
sharply

8-12x

follow-up attempts needed to
convert a qualified lead

"If you're not consistently responding within 15 minutes, you're donating cases to your competitors."

Simple. Honest. Uncomfortable.

For each item below, select the answer that reflects your firm's actual, consistent behavior — not your best day.

● Yes = 2 points

● Sometimes = 1 point

● No = 0 points

18–20

Strong Operations

You're ahead of most firms.
You're still leaking some revenue at the margins — but you have a real foundation to build on.

12–17

Operational Gaps

Clear, identifiable gaps costing you cases right now. Fixable — but not without deliberate, systematic action.

0–11

Active Revenue Loss

You are actively losing a significant portion of your inbound cases. More marketing spend will make this worse.

Your Score

Updates as you complete the audit

0 / 20

0

10

20

BEFORE YOU BEGIN

What This Audit Covers

Five areas. Twenty questions. Ten minutes. The results will tell you exactly where your intake process is costing you cases.

#	SECTION	WHAT YOU'RE MEASURING	POINTS
1	Speed to Lead	How fast your firm responds to new inbound inquiries across all channels	/ 10
2	Call Coverage	Whether inbound calls are answered live during and after business hours	/ 10
3	Follow-Up Persistence	How many attempts your team makes before abandoning a non-responsive lead	/ 10
4	Intake Quality	Whether your intake calls are structured, scripted, and consistently executed	/ 10
5	Systems & Visibility	Whether you have the data and tools to see what's actually happening in your intake	/ 10
Total Possible Score			20



Speed to Lead

We contact new inbound leads within 15 minutes, consistently.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
During business hours, we contact new leads within 5 minutes.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
We have automatic routing or alerts that notify staff the moment a lead comes in.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
Missed calls are returned within 10 minutes.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
We track response time broken down by lead source.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts

Most firms fail here first. Speed to lead is the single highest-leverage variable in intake conversion — and the one most firms treat as optional.

Section 1 Score

— / 10

Select all 5 items to see your score

Why Speed to Lead Determines Your Conversion Rate

Research from Harvard Business Review found that firms contacting leads within one hour are 7x more likely to qualify them than those that wait even 60 minutes. For law firms, the stakes are higher: a prospect calling after an accident, arrest, or legal crisis is making multiple calls simultaneously. The first firm to answer and engage wins the case — not the best firm, not the most experienced firm.



Call Coverage

100% of inbound calls are answered live during business hours.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
100% of evening and weekend calls are answered.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
Voicemail is not the default during business hours.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
We track and review our call answer rate on a regular basis.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
We have a defined overflow handling process when staff are unavailable.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts

If calls go to voicemail, the lead is already gone. Prospects calling a law firm are usually in a moment of urgency. They will call the next firm on the list before your voicemail finishes playing.

Section 2 Score

— / 10

Select all 5 items to see your score

Why Live Answer Coverage Is a Revenue Decision

Every call that goes to voicemail during business hours is a lead that experienced your firm at its worst possible moment. The prospect called because they needed help — and your firm told them, in effect, to try someone else. Voicemail during business hours is not a staffing inconvenience. It is an active revenue leak with a calculable dollar value.



Follow-Up Persistence

We make 8–12 follow-up attempts before marking a lead as unresponsive.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
Follow-up uses multiple channels: phone call, text message, and email.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
There is a structured follow-up cadence — not one-off or staff-dependent.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
Every new lead receives at minimum a follow-up within 24 hours.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
We track contact rate (% of leads we actually reach) and review it regularly.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts

Most firms quit too early and blame lead quality. The data is consistent: the majority of conversions happen on follow-up attempts 5 through 12. Stopping at 2–3 is not a lead problem — it's a process problem.

Section 3 Score — / 10 Select all 5 items to see your score

Why Most Firms Are Leaving Cases on the Table After the First Call

The average law firm makes 1.3 follow-up attempts before abandoning a lead. The average number of attempts needed to convert a qualified legal prospect is 8 to 12. That gap — between what firms do and what conversion actually requires — is where the majority of marketing spend disappears.



Intake Quality

Intake calls follow a scripted or structured process — not improvised.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
The goal of every intake call is to sign the client — not just collect information.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
We track intake conversion rate (leads contacted → consultations booked).	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
Staff are trained to handle common objections during the intake conversation.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
Intake calls are recorded and reviewed or audited on a regular basis.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts

Intake is a sales conversation. The prospect is evaluating you just as much as you're evaluating them. An unstructured intake call is a missed conversion opportunity — every time.

Section 4 Score

— / 10

Select all 5 items to see your score

Why Intake Quality Directly Determines Case Value

An unstructured intake call does two things poorly: it fails to qualify the prospect accurately, and it fails to build the trust needed to retain them. Prospects who call a law firm are making a high-stakes decision. They are evaluating whether the person they're speaking to is competent, empathetic, and trustworthy — often within the first 90 seconds. A scripted, structured intake process is not about being robotic. It's about ensuring every prospect gets the same high-quality experience regardless of who answers.



Real-time intake data is available to leadership without manual reporting.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
We track speed to lead, answer rate, follow-up count, and conversion rate in one place.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
We know exactly where leads are dropping off in the intake funnel.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
Intake performance is reviewed in a structured meeting at least weekly.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts
Marketing spend and intake conversion data are connected — we know cost per booked case.	<input type="radio"/> Yes 2 pts	<input type="radio"/> Sometimes 1 pt	<input type="radio"/> No 0 pts

You can't fix what you can't see. Firms that lack intake visibility are making marketing and staffing decisions based on instinct. That's expensive instinct.

Section 5 Score

— / 10

Select all 5 items to see your score

Why Visibility Is the Prerequisite for Every Other Fix

You cannot optimize a process you cannot see. Firms that lack intake visibility are making staffing decisions, marketing budget decisions, and operational decisions based on gut instinct — and paying for it in wasted spend and missed cases. Real-time intake data is not a luxury for large firms. It is the minimum requirement for running a profitable practice in a competitive market.

WHAT YOUR SCORE MEANS

Your Results

Be honest with yourself. The score reflects your firm's actual operations, not your intentions.

18–20

Strong Operations

You're ahead of most firms. You're still leaking some revenue at the margins — but you have a real foundation to build on.

12–17

Operational Gaps

You have clear, identifiable gaps that are costing you cases right now. These are fixable — but not without deliberate, systematic action.

0–11

Active Revenue Loss

You are actively losing a significant portion of your inbound cases. Every marketing dollar you spend is partially wasted until this is addressed.

More leads will not fix this. It will only increase the waste.

NEXT STEP

Found gaps? *That's normal.* Here's what to do about it.

If you found gaps in your intake process, you're not alone. Most firms do. The difference between firms that fix it and firms that don't is whether they take the next step.

We offer a free intake audit — including a live secret shopper test on your firm — so you can see exactly where your process breaks down, with real data, not guesswork.

Get a Free *Secret Shopper* Intake Audit

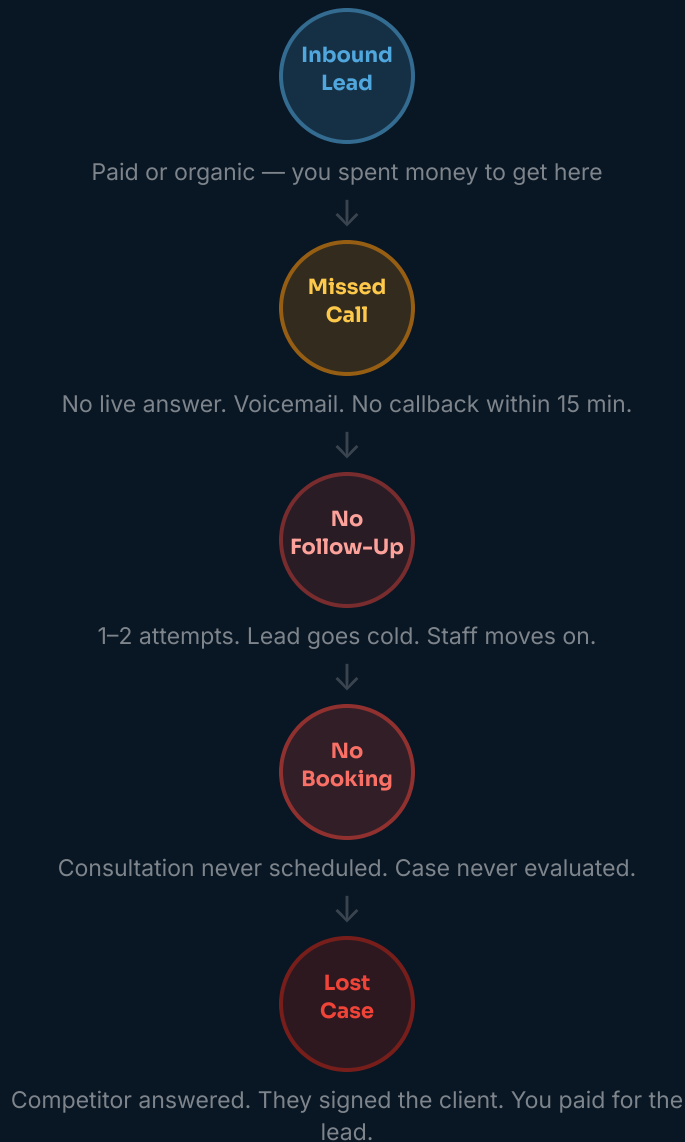
We'll call your firm as a prospective client, document exactly what happens, and walk you through where you're losing cases. No pitch. Just a direct look at your operations.

[Audit My Intake →](#)

[Speak with an intake auditor](#)

Where Your Leads *Actually* Go to Die

This is the path most inbound leads take at firms with broken intake operations.



This happens **every day** at firms that haven't fixed their intake operations.
The fix isn't more marketing. It's fixing the process that catches what you're already paying for.

