Intake Systems

High Level Intake Strategy

Choose Intake Software

- Select intake-specific software for your firm.
- Ensure it automates where leads come from (source attribution

Understand Source Attribution

- Conversion Source
  - Identify where leads come from.
- Conversion method
  - Know how leads convert.

Track Performance

- Automate tracking calls, conversion rates, and lead conversions
- Measure staff performance within a structured intake system

TOOLS FOR INTAKE

01 **ZAPIER**
Automation tool for creating intakes in the system.

02 **VOIP**
A VoiceOver IP System allows for different call queues and setups.

03 **SMS SYSTEM**
Enables texting clients from the main office number.

INTAKE PROGRAMS

04
- Lead Docket
- LawMatics
- Law Ruler,
and others for lead management and attribution.