ATTORNEY ASSISTANT

# Client Intake SOP:

## Attorney Assistant

# OBJECTIVE:

To provide a consistent, empathetic, and efficient intake process that captures, qualifies, and converts legal leads, without attorney involvement in early-stage communication.

## TOOLS NEEDED

- CRM (e.g., Clio Grow, Lawmatics, MyCase)
- Call & Email Scripts
- Online Intake Form
- Call Tracking Tool (e.g., CallRail)
- Scheduling Tool (e.g., Calendly, Acuity)

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# DAILY TASKS:

### 1. LOG INTO CRM

- Review new lead alerts from forms, calls, or referrals.
- Check task list for scheduled follow-ups.

### 2.RESPOND TO NEW INQUIRIES (WITHIN 5 MINUTES)

- Prioritize phone calls, then emails/texts.
- Use the intake call script to guide conversations.

### 3.QUALIFY THE LEAD USING STANDARD CRITERIA:

- Ask 3–5 pre-set qualification questions customized to the firm's practice area:
  - Personal Injury: "Was there a documented injury?", "When did the accident occur?", "Was someone else at fault?"
  - Family Law: "Are there existing court orders?", "What stage are you at in the process?"
  - Immigration: "What is your current immigration status?", "What type of relief or service are you seeking?"
  - Criminal Defense: "What are the charges?", "Is there a scheduled court date?"
- Record responses directly into CRM.
- Mark status as "Qualified," "Not Qualified," or "Needs Review."

### 4.TAG AND CATEGORIZE LEAD:

- Use CRM tags to assign:
  - Case Type (e.g., PI, Family, Immigration, Criminal)
  - Urgency Level (Immediate, Within 30 Days, Non-Urgent)
- Note referral source (e.g., Google, past client, ad campaign).
- Flag for conflict check if any prior contact is identified.

### 5.BOOK CONSULTS FOR QUALIFIED LEADS:

- Use the attorney's calendar link to schedule.
- Send confirmation email/text with intake form attached.

### 6.FOLLOW UP ON UNRESPONSIVE LEADS (DAILY TASK LIST):

- Phone call attempt #2 (log call disposition in CRM).
- Send follow-up email + reminder text.
- Update lead notes and tag for urgency/status.

### 7.MAINTAIN COMMUNICATION STANDARDS:

- Be empathetic and calm—especially in PI, family law, or immigration cases.
- Use the "Client Empathy Script" for sensitive matters.
- Never provide legal advice—always defer legal questions to attorney consult.

### 8.ESCALATION CRITERIA (NOTIFY ATTORNEY DIRECTLY):

- Lead is a VIP referral or comes from a referral partner
- Case fits high-value profile (e.g., catastrophic injury, HNW family case)
- Lead mentions press/media interest

### 9.WEEKLY QA TASK:

- Pull intake metrics: response time, conversion rate, follow-up volume.
- Review missed leads and suggest process improvements to firm lead.

## END-OF-DAY WRAP-UP:

- Make sure all leads are tagged, followed up, and documented in CRM.
- Confirm next-day calendar is updated with all booked consults.
- Escalate any urgent issues to the firm contact before logging off.