LEGALSONE FIELD GUIDE

Client Intake Workflow Audit

Map the current intake path, identify delay and duplicate work, then prioritize practical improvements.

USE THIS WITH	OWNER	REVIEW DATE
Firm leadership and operations	____________________	____________________

1. Establish the baseline

Measure what happens today before redesigning it.

[ ] List every intake channel and its owner.

[ ] Record business-hours and after-hours response time.

[ ] Measure inquiry-to-consultation and consultation-to-decision time.

[ ] Count incomplete forms, no-shows, and unassigned leads.

[ ] Document every system and spreadsheet touched.

2. Map each handoff

Follow one representative inquiry from start to finish.

[ ] Who receives and acknowledges it?

[ ] Where is contact and matter information entered?

[ ] How are conflicts, urgency, and fit reviewed?

[ ] Who schedules and prepares the consultation?

[ ] How are accept, decline, and follow-up decisions recorded?

[ ] What opens the matter after engagement?

3. Find friction and risk

Mark delays, duplicate entry, and unclear ownership.

[ ] Information is copied between systems.

[ ] A task waits without a named owner or deadline.

[ ] A decision is made outside the record.

[ ] A public form collects unnecessary sensitive information.

[ ] A follow-up depends on memory.

[ ] Management cannot see status without asking staff.

4. Prioritize improvements

Choose changes by impact and implementation effort.

[ ] Eliminate one duplicate-entry step.

[ ] Set response-time targets and escalation.

[ ] Use structured fields for routing and reporting.

[ ] Automate acknowledgments, reminders, and routine task creation.

[ ] Keep conflict, case evaluation, and legal advice under human review.

[ ] Review metrics every month for one quarter.

Future-State Design

Describe the new workflow before configuring software.

Success measures

Name the outcomes and owners.

[ ] Target median first response: ___________

[ ] Target consultation conversion: ___________

[ ] Target incomplete-form rate: ___________

[ ] Workflow owner: ___________

[ ] First review date: ___________

This operational resource is for planning and discussion. Adapt it to your firm's professional, legal, and contractual obligations.