Legal Intake Audit Checklist

A 42-point self-audit for U.S. law firms — find the leaks in your intake funnel in under 30 minutes.

PREPARED BY SEMPULL · BILINGUAL LEGAL INTAKE

1. Answer-speed & coverage

- Every inbound call answered live in under 20 seconds during business hours.
- Live coverage after 6pm, weekends, and federal holidays (not just voicemail).
- Documented escalation path when all intake lines are busy.
- Voicemail rate measured weekly and kept under 5% of inbound calls.
- Missed-call callback within 5 minutes during open hours.

2. Bilingual capacity

- Spanish-speaking caller reaches a native Spanish speaker on the first ring (no transfer, no Language Line).
- Bilingual coverage extends to after-hours and weekend shifts.
- Spanish-language intake script reviewed by a native Spanish-speaking attorney or paralegal.
- Spanish caller hang-up rate tracked separately from English.
- Voicemail greeting available in Spanish.

3. Qualification logic

- Written qualification criteria per practice area (case type, jurisdiction, SOL window).
- Conflict check performed before lead is marked qualified.
- Insurance / fault / damages questions captured for PI matters.
- Status / detention / prior representation captured for immigration matters.
- Jurisdiction / asset complexity / prior reps captured for family law.
- Borderline leads flagged for attorney review — never silently rejected.
- Case-strength tag (A / B / C) attached to every qualified lead.

4. Scheduling & follow-up

- Consults booked live during the first call (not 'we'll call you back').
- Automated bilingual SMS + email reminders 24h and 1h before consults.

- No-show recovery call within 15 minutes of missed slot.
- Time-zone aware scheduling for multi-state firms.
- Attorney availability synced to a real calendar (Google, Outlook, Calendly, Acuity).

5. CRM & data hygiene

- Every qualified lead pushed to your CRM in real time (Clio Grow, Lawmatics, Filevine, MyCase, HubSpot).
- Structured fields populated — not just a paragraph summary.
- Call recording linked to the CRM record.
- Transcript linked to the CRM record.
- Source / campaign tag attached to every lead.
- Duplicate-lead detection on phone + email.

6. Compliance & risk

- TCPA-aware messaging — no auto-texts to unconsented numbers.
- Recording-disclosure language read at the start of every recorded call.
- Conflict checks logged and timestamped.
- PII access restricted to authorized roles in the CRM.
- Vendor BAAs / DPAs reviewed annually.

7. Measurement & optimization

- Inbound call volume reported weekly.
- Answer rate reported weekly (English + Spanish separately).
- Lead-to-consult and consult-to-retainer rates measured monthly.
- Cost per signed case reviewed monthly against ad spend.
- After-hours conversion measured separately from business hours.
- Weekly QA call review with intake team — minimum 5 recordings.
- Intake script versioned with change log.
- Quarterly attorney NPS on lead quality.

Score yourself

Count the items you can confidently check off today.

38–42 — Best-in-class. Your intake is a competitive moat.

30–37 — Strong, but bilingual coverage and CRM data flow are usually the next 10% of revenue.

20–29 — You're leaking a meaningful percentage of paid ad spend. Bilingual + after-hours is the fastest fix.

Below 20 — Every month you wait costs more than a year of Sempull. Book a call.

Want help fixing what you found?

Sempull runs a 30-minute discovery call where we walk through your current intake flow, identify the leaks, and project the lift bilingual-first intake would deliver for your firm. No commitment, no slide deck — just diagnostics.

Book at **sempull.com** or email hello@sempull.com.