

FREE CHECKLIST

Lawmatics Intake Audit Checklist

Answer each question about your current Lawmatics setup, and treat every no answer as a specific gap to close.

Speed to lead

- Does every website form submission receive an automated response without a human touching it first?
- Does that first response go out within minutes at any hour, including nights and weekends?
- Is a task assigned to a named person the moment a new lead arrives?
- Do phone and referral leads enter the same pipeline as website leads?

Pipeline hygiene

- Does every open lead sit in exactly one pipeline stage that reflects its actual state?
- Can you state, for each stage, the event that moves a lead out of it?
- Are stalled leads kept separate from lost leads instead of sharing a stage?
- Does someone review leads that have stopped moving, on a schedule rather than on impulse?

Follow-up automation

- Does entering a stage trigger the next touch automatically rather than relying on memory?
- Does every automated sequence stop when the lead replies?
- Does every automated sequence stop on a stage change, a closed matter, or an unsubscribe?
- Does booking a consultation trigger a confirmation and reminders without staff involvement?

Measurement

- Is a marketing source recorded on every lead at the moment it enters the pipeline?
- Can you see how many leads reached each pipeline stage in a given period?
- Can you tell which sources produce signed engagements, not just inquiries?
- Has a report changed something about your intake process in recent memory?