# Client Intake: A Guide for Law Firms

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Client intake in law firms is the process of onboarding new clients and acquiring the personal information that is needed to open their cases. It can also help assess whether a potential client is a good fit for a law firm—for example, whether any conflicts prevent the firm from acting for the client or whether the law firm has the relevant skills or specializations to represent them for their legal matter. The client intake process can be an incredibly time-consuming exercise for solo and small firm attorneys. Usually, it's also an unbillable one.

Whether you're just starting your own firm or you own an established practice, a streamlined law firm intake process is key for making a good first impression on clients and keeping your practice running efficiently.

Here's everything you need to know about creating a strong client intake process for your law firm—including an overview of the client intake stages, some best practices, and thoughts around online and automated client intake processes.

*Clio Grow makes client intake effortless—automate online forms, appointment scheduling, and e-signatures, all while attracting more leads through Google. Book your Clio Grow demo today!*

## Overview of the client intake process

Client intake is more than just getting potential new clients to fill out an intake form: It's an entire process of attracting and hiring new clients, from their first interaction with your firm to the moment they sign an engagement letter. In some cases, client intake may also involve onboarding new clients after they've signed on with your law firm.

The intake process can be divided into several stages:

1. **Attracting a new potential client**. Clients might find you through a friend, by coming across your website when searching for information related to their legal issue, or by searching for a law firm in their city or town.
2. **Capturing contact information**. Making it easy for potential clients to share their contact information with you is key for earning them as a client.
3. **Pre-screening**. Before booking an initial consultation, collect enough information to determine whether a given client is a fit for your firm.

4. **Conflict checking**. Make sure there's no reason you can't work for a potential client.
5. **Scheduling and holding an initial consultation**. Allow clients to book meetings with you via a tool like Clio Scheduler.
6. **Collecting key information via an intake questionnaire**. Ask clients to provide key information you'll need for their case.
7. **Creating a fee agreement—and getting it signed**. With the right tools, you can generate this form automatically from information in the client's intake questionnaire.
8. **New client onboarding**. Law firm client onboarding should include sending clients information on when to expect bills and in what format, how to pay bills, and when you're available to help set expectations and lead to a smoother experience for all involved.

By paying close attention to your law firm's overall client intake process, you can find opportunities to streamline individual elements of client intake—for a better experience for your clients and a lighter workload for your firm. For example, if you're currently using paper intake forms, you may want to consider switching to an online version that clients can fill out in the comfort of their homes. More on that later.

# Client intake best practices

Lawyer-client relationships are extremely important, so it's important to start them off right. During the intake process, show that you're listening to your future clients and that you're engaged with their issue while also making the process as simple as possible for them.

A good client intake process should be:

- Straightforward for your client
- Efficient for your staff
- Organized for all involved
- Personalized to show you care

Read on for other best practices to follow for client intake:

## 1. Document your client intake policies and processes

How should your staff handle calls or emails from prospective clients? Who schedules consultations? Where can client intake forms be found? What happens when a potential client visits your office? Most answers to these questions are common sense, but it's still a good idea to clarify expectations for lawyers and staff.

## 2. Conduct a thoughtful pre-screen

The easiest way to waste time on client intake is to onboard clients that aren't a good fit. Lawyers love to help, but not every problem or person is a match for your practice area, workload, or firm size. It's OK to say no to those who would be better served elsewhere.

To pre-screen clients, try setting up a short phone call to assess the matter at hand. Some considerations that help determine whether a potential client is a good fit include:

- What does the person need help with and what are they hoping to achieve?
- Does their issue actually require a lawyer's help, or would they be better served by consulting another professional or resource?
- What will their matter require, both in terms of legal skills and time?
- Do they have a budget or financial limitations that may impact your ability to help them with their legal problem?

You could also consider using a tool like Lawbrokr to make pre-screening even more efficient. If you do this, make sure you use a tool that integrates with your practice management software so information transfers easily.

If you decide the client isn't a good fit after this initial call, refer them to another attorney in your network or to a website or organization that may be able to give them the information they're looking for. Even though you're not taking this person on as a client, they'll still remember your help—and will be more likely to refer you to friends or family who could actually be a good fit for your firm.

Ensure scheduling these calls is simple for both you and your prospective clients. For example, Jennifer Reynolds, a family lawyer and founder of Fresh Legal in Ottawa, Canada, clearly shows potential clients where to go on her home page with a "book a free call today" button:

This takes visitors to a page where they can schedule a call or request an in-person meeting based on Jennifer's availability. Jennifer uses Acuity Scheduling for this.

## 3. Listen, listen, listen during your initial consult

Listen to your client and be empathetic during your initial consultation or phone call. Often, people come to lawyers for help facing extremely difficult life challenges (even if it's a business matter, there's likely some level of emotion or stress involved) and making a

prospective client feel comfortable from the start could help them choose to work with you. Carefully consider how you will conduct the consultation and what questions you'll ask.

## 4. Take time to discuss fees

When you conduct your initial consultation, leave time to discuss your billing process, accepted methods of payment (e.g., check or credit card), and all things payment related. This is key for setting expectations and ensuring that you and your client are aligned on payment terms. Don't hesitate to discuss alternative billing methods—for example, if you bill flat fees instead of hourly, or if you offer payment plans.

## 5. Integrate with your practice management software

Duplicate data entry is time-consuming and leaves room for error—this is not a good situation for law firms dealing with a myriad of data fields during the client intake process.

Luckily, there's a simple solution. Set up your intake process to input or import information directly into your practice management software.

For example, Jennifer uses Zapier to automatically create new contacts and matters and push information from her client intake forms to custom fields within Clio. (Zapier lets people set up custom connections, or "zaps," between different apps without the need for any coding knowledge.) It works like this:

> "Prior to a consultation meeting, potential clients fill out two online forms that I built. All of the questions on these forms link to custom fields in Clio. I created two separate forms as I wanted the "new contact" trigger in Zapier to happen regardless of whether the client retained me, but I did not want the "new matter" trigger to occur until after the meeting and only if the client retained me. The first form asks for contact information that links to "contact custom fields." Using Zapier, this form automatically creates a contact in Clio. The second form provides matter-specific information, including names and dates, and links to "matter custom fields." Again using Zapier, this form automatically creates a note in Evernote that I can review and print in advance of the meeting. If the client retains me, a simple copy/paste in the response spreadsheet of the second form triggers Zapier to create a new matter, and I immediately have information required for initial court forms at my fingertips."

A client fills out their information once—no painstaking double entry.

For an even more streamlined legal intake solution, look for end-to-end software like Clio Expnad, which allows you to use Clio Grow and Clio Manage together; where Clio Grow is your client intake software, and Clio Manage handles everything related to law practice management.

## 6. Track potential clients by their stage in the law firm intake process

Don't let potential clients fall through the cracks. Break your law firm intake process into well-defined stages, such as "not yet contacted", "needs follow-up", or "intake form pending," for a clear picture of which clients you need to take action on—and what needs to happen.

## 7. Automate engagement agreements

With document automation software, you can create standardized templates to encompass a variety of different situations and matter types, and then use software to auto-populate the appropriate data into these templates.

## 8. Offer e-signatures

When it comes to bringing on new clients, your goal should always be to minimize barriers. One of the best ways to streamline your intake process is to offer e-signatures on fee agreements and other documents.

## 9. Never stop improving

Whatever improvements you make, it's important to keep in mind that your client intake process will never be perfect. Reevaluate your process on a regular basis (e.g., every six months) to see whether there are opportunities to make your process more efficient or improve the experience for potential clients.

*Get even more tips for improving client intake at your law firm.*

# Why firms are moving to online client intake

Traditionally, client intake involves having new law firm clients fill out a paper form, which a staff member then painstakingly types out. In the digital age, there's no need to struggle with printing, scanning, or photocopying client intake forms. Solutions like Clio Grow help take your client intake process online, removing the potential for lost pieces of paper and eliminating the need for duplicate data entry.

For example, Jennifer Reynolds uses two online client intake forms to gather new client information. The first client intake form collects contact information for all potential clients, whether they retain her services or not. The second client intake form collects new matter information for incoming clients.

Streamline your firm's client intake process while reducing the risk of error with online client intake tools and forms.

Here are a few other benefits of moving your client intake online:

## 1. Improved organization and workflow

Most firms still use manual, disjointed processes for intake: jotting down notes by hand; logging data in MS Office or Google Docs; sending out PDFs for clients to print, fill out, scan and send back; etc.

Focus more of your time and energy on the legal work you're actually paid for. Online intake solutions keep you organized and cut down the time you spend working on trivial intake tasks.

For example, Clio Grow includes a legal CRM software for keeping up-to-date on the status of potential clients, and insight into where potential clients are coming from.

Using these tools, you can create a systematic workflow for managing your prospects, intaking new matters, and then seamlessly pushing the data over to Clio as soon as a matter goes from "pending" to "hired." All you have to do is get to work!

## 2. Reduced data entry

Nobody likes data entry. It's boring, frustrating, and time-consuming. Whether you do it yourself or pay somebody else to do it, the end result is always a fruitless expenditure of time and money.

With online intake forms, your clients do most of the data entry for you.

When a client submits an online form, their data can be exported to Clio and automatically create a contact with the appropriate information. Even if it's just for contact details, you'll save up to five minutes on every single contact you create.

## 3. Better client experience

Consumer expectations and behaviors are changing rapidly as Millennials are become the primary decision makers in homes and businesses.

We communicate through mobile messaging and social media apps. We use mobile devices to check our email (66% of the time) and access digital media (60% of the time). Above all, we expect everything to be incredibly easy and user-friendly.

The last thing we want to do is fill something out by hand, or....(gasp)...print something out!

Offer clients online intake forms (accessible from their beloved mobile devices) to make life easier not only for yourself, but—most importantly—for your clients. For example, with Clio Grow, you can save time and avoid errors by sharing custom intake forms through your website, email, or text. Capture information right in Clio Grow and sync it directly to Clio Manage.

It's just good customer service—and good service is the key to customer satisfaction, repeat business, and more referrals.

## 4. Better data tracking and analytics

Finally, attorneys should be most excited about data. Most law firms do a very lackluster job of utilizing data to make better decisions. But, as downward price pressure continues and the market becomes increasingly competitive, leveraging data is becoming a necessity.

When you use software to manage business processes, data is an inevitable byproduct. But, unlike using Excel or other programs which require manual data manipulation, the analytics layer can be built straight into the product.

Powerful analytics are built directly into the Clio Grow dashboard to help you track important business metrics for your law firm—things like where your leads are coming from, how effectively you are converting prospects into clients, and which types of matters have the highest dollar value.

The best part? It all happens automatically. You don't have to do anything to access these analytics when using Clio Grow as a legal intake solution, aside from inputting some data points about each client and matter during the intake process.

Once you've been hired, there's a lot of information you'll need to gather from the client, and with Clio Draft's Questionnaires, you can automate the process!

# Automating your client intake process

According to the *Legal Trends Report*, lawyers spend less than 3 hours on average on billable work.

Automation can help. With the right setup, you can take your online client intake to the next level and easily bring on new clients in a fraction of the time with less data entry—and less risk of error.

There are a number of ways to automate your client intake procedures. For example, Clio Grow and Clio Manage offer an end-to-end solution for client intake that allows you to automatically generate online forms, create appointments, receive documents, and more. (Bonus: Clio Grow integrates directly with some of the tools listed above for an even more flexible process!). Watch this webinar recording to see how to automate client intake inside of Clio Grow in 2025.

And, with Clio Grow's website builder, you can create a professional website right from Clio Grow that comes with everything you need to make a great first impression—and provide prospective clients with everything they need for a great intake experience, including

automatic appointment booking, contact forms, and a access to a client-attorney portal.

Whatever you choose, it's worth exploring options for automating client intake. The time savings from the removal of extraneous data entry alone will be worth it!

*Learn more about ways to automate client intake.*

# Final thoughts on client intake for law firms

A small investment for law firm intake can mean a big improvement for your firm. Consider the case of Palace Law, a personal injury firm with 22 staff: Just a few changes to their client intake system allowed them to meet their 2017 revenue goals by the end of Q3—a 76% increase in year-over-year revenue in just three quarters. Palace Law continues to improve on its client intake process, introducing efficiencies that add up to increased revenue for the firm.

Time is money. Non-billable tasks like client intake take away from time helping clients and focusing on billable work. Use the tips in this guide to improve the procedures at your firm:

- **Automate where you can** ... In the digital age, there's no need to take on all the work of client intake yourself. Look for tools to help lighten the load.
- **... But don't forget a human touch**. You only get one chance to make a first impression, and your firm's client intake process is that chance. Your process should be simple and efficient, while demonstrating that you care about meeting your clients' needs.
- **Always be improving**. A client intake process is never perfect. Seek feedback from clients, and be on the lookout for tools and new ideas to make your procedures more efficient.

Investing in your client intake process and implementing legal intake solutions means more than just adding operational efficiencies for your practice: You'll serve your clients better, enhance your reputation, and drive more referrals to your firm.

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## About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together

with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.