The 4 Steps of an Effective Client Intake Process

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The client intake process is an important part of the overall customer lifecycle. It's essentially the series of steps required to convert prospects into paying clients. In other words: a law firm's sales process.

Yet despite its importance, few law firms have put much energy into optimizing their client intake process. Doing so can be beneficial, though. That's because a strong intake process has the power to help firms:

- Improve the client experience
- Increase efficiency
- Boost their marketing ROI
- Drive conversion rates

A poorly developed intake process can result in disorganization, wasted time, and lost revenue as potential clients slip through the cracks.

So, what's involved in the intake process? Below, we've outlined four key stages of an effective client intake process—including tips to help you optimize each stage for success.

Did you know that Clio Grow has online intake forms that help automate the client intake process, can save you hours on drafting documents, and can get clients through onboarding in no time—book a demo today to discover an automated client intake process.

What is client intake?

Client intake refers to the process of introducing a potential new client to your law firm. Through a series of steps, legal professionals collect relevant client information, assess whether they're a good fit, conduct conflict checks, and successfully onboard them. As this is the first impression a client has with a firm, it can set the stage for the future relationship.

Step 1: Acquiring and nurturing leads

The client intake process begins once you capture a "lead," which is a potential new client. New clients can come from a variety of channels, including:

- Referrals
- Advertising campaigns
- Website traffic

Potential new clients might call your office, send you an email, fill out an online contact form, or a client intake form on your website, or come from a paid lead generation service.

Regardless of the source or the method of contact, your client intake process should begin at the exact moment someone reaches out to you.

In order to convert someone from lead to client, you'll want to avoid a few pitfalls in the lead management process including:

- Responding too slowly
- Failing to track your leads
- Forgetting to follow up
- Not offering enough information up-front

Oversights like those listed above can have a severe impact on your conversion rate (i.e., the rate at which leads convert to paying clients)—and ultimately, the success of your firm.

As found in the *Legal Trends Report*, "Unresponsive firms create a nearly unanimous negative perception among shoppers", as only 12% of secret shoppers in 2024 would recommend the firms surveyed due to lack of response, lack of payment details offered, and lack of information on next steps.

That's why implementing a lead management system is a key first step toward improving your overall client intake process. For example, Clio's CallRail integration allows legal professionals to understand exactly where leads are coming from and tracks their conversions.

Best practices for lead acquisition and nurturing new clients

1. Track every client lead in a CRM system

Post-Its and Excel sheets might get the job done when you're just starting out as a solo lawyer. But they won't cut it as your firm starts to grow and receives a greater influx of new inquiries and clients.

The single most important step you can take to optimize your lead management process is implementing a proper legal CRM system. This will allow you to easily track each lead, record their contact information, and set reminders to follow up.

2. Use a virtual receptionist to answer every call

Nothing rubs a prospective client the wrong way like an unresponsive law firm. This issue is only getting worse, as seen in our latest *Legal Trends Report*, only 52% of law firms are answering phone calls or calling potential clients back in 2024, down from 73% of law firms in 2019.

This raises the question: how fast do firms need to respond to prospective clients? Clio's *2019 Legal Trends Report* found that 79% of clients expect responses within 24 hours. Yet, most law firms aren't delivering on these expectations.

That's where technology can help.

By using a virtual receptionist service, for instance, you can ensure that every single call from a prospective client will be answered by a real person, even on evenings and weekends.

This responsiveness can go a long way toward improving the client experience and building trust early on during the intake process. This is key to maximizing the likelihood that a lead will convert.

3. Use automated drip emails to nurture cold leads

During the early phases of client intake, your actions will often depend on how "warm" the lead was when they first contacted you.

Some people might call your office ready to hire you, which means you can jump straight to a later stage of the intake process. For instance, you might have your receptionist schedule a consultation on the spot. Or potentially even draft a fee agreement in certain practice areas like personal injury.

Your leads won't always be this eager. Colder leads will require more interactions to nurture them toward taking the next step in the client intake process.

A great way to accomplish this without spending all day following up with people is to send out "drip emails," or automated email sequences.

These emails can include things like educational content, testimonials from past clients, and other information that will help build your potential clients' trust and keep them engaged.

There are a variety of email marketing solutions that offer drip functionality, such as MailChimp and Constant Contact. You might even find some of these features built directly into a CRM, like the drip campaigns and email automation features offered by Clio Grow.

Step 2: Scheduling a consultation

Once you've acquired a lead and started to build their trust, it's time to schedule an initial consultation.

The consultation is effectively a "sales meeting," because you get the opportunity to learn more about the legal matter at hand. And if they're a good client fit, you'll hopefully land their business.

Given the importance of consultations, it's worth spending the time creating a strong process for setting these appointments and ensuring that people show up.

Best practices for initial client intake consultations

1. Screen clients beforehand with a brief questionnaire

Most consumer-facing law firms deal with "tire-kickers." These are people who may inquire about legal services, despite having no real claim or legal issue, or lack the budget to afford the services.

Screening for client-attorney fit early in the process is a great way to ensure your services and budget align with a prospective client's needs.

One technique is to use a brief (i.e., 10-15 questions max) legal intake questionnaire to gather some basic information, such as:

- Their contact info

- The names of opposing parties
- Their current employment status and income
- Details about their legal matter

Collecting this information upfront enables admin staff to perform a conflict check, review the merits of the person's matter, and ensure that they can afford the services before deciding whether to bring them in for a consultation.

Ideally, you should use an online intake form tool to make this process easy for your prospective client. For example, Clio Grow offers online intake forms that are mobile-responsive, so that clients can fill them out anywhere, on any device.

2. Always send a confirmation email and a reminder

There's nothing worse than a no-show. This doesn't just waste your time—it also means that you will be unlikely to land your new client.

In order to reduce the possibility of someone forgetting about their initial consultation, send out a confirmation email as soon as a consultation is booked.

The confirmation email should confirm the date and time of the appointment. You can also include helpful information, such as your office address, instructions for where to park, or dial-in information for a phone consult.

You might also consider using the confirmation email to "warm up" the potential client a bit and continue building their trust. A good strategy is to include:

- Links to relevant educational articles on your website
- Positive testimonials from past clients
- Video introductions of the attorneys
- Other resources that establish your firm's credibility

Finally, you should plan to remind every prospect about their upcoming appointment either the day before, or a few hours before each appointment occurs.

You can assign this task to a receptionist or office administrator and have them call each person to confirm that they still plan to show up. Alternatively, you can use an automated appointment reminder system, such as Clio Grow's appointment scheduling tool.

What is a client intake interview?

A client intake interview is an initial meeting where a law firm gathers essential information about a potential client's case, assesses fit, and sets expectations. It also allows the client to ask questions and evaluate the firm.

Step 3: Collecting information

Gathering information is a core step of the client intake process.

The information collection process usually begins right when a new lead comes in, and it continues in a variety of ways before, during, and after the consultation.

Because this step is so fundamentally important to providing legal services, the process for collecting information is certainly something that should be optimized for organization and efficiency.

Best practices for collecting information

1. Use standardized questionnaires to ensure accuracy and consistency

Having incomplete or inaccurate data can cause serious problems, including exposure to malpractice claims.

Standardizing your data collection practices and using questionnaires specific to each type of case or matter makes it easier for staff members to collect the information needed. The process will also be far less prone to errors.

Each questionnaire should include all the important details about both the client and their legal matter, such as:

- Contact information
- Birth dates
- Key dates and deadlines related to the legal matter
- Opposing party names and contact info
- Any other specific information necessary to provide services

2. Capture important data in a database by using custom fields

Saving your client intake information on paper questionnaires or in Word documents won't do you much good. That's largely because the data won't be in a structured format.

Sure, you can manually re-enter the data into a case management database later. The downside? This takes considerable time and effort.

By using automation to capture data into custom fields, you can collect your data in a structured format while also completely eliminating the manual data entry process.

For example, by using Clio Grow's online intake forms, and connecting the questionnaires to your Clio custom fields, you can collect the data you need and record it directly into your Clio Manage database.

Unlike data that's saved in a scanned document or a Word file, data in a structured database is easily searchable. You can also use it to automatically draft documents, generate bills, or even send it into other software programs via an API integration.

What is the purpose of the client intake form?

The purpose of a client intake form is to collect essential client information and their legal needs at the start of the relationship. This form helps the law firm assess the case, perform conflict checks, and set clear expectations, ensuring a smooth onboarding process and online intake forms can automatically flow into your LPM software.

Step 4: Drafting & signing the fee agreement

By this stage of the intake process, you've almost sealed the deal and landed your new client. The last step is to get the fee agreement drafted and signed, and open the matter for billing in your case management system.

Getting the fee agreement drafted and signed is one of the most important steps in the client intake process. Why? It's where the attorney-client relationship is formalized—and where the client agrees to pay your fees.

The key element to focus on at this stage is making the sign-up flow as easy as possible for both the client and your law firm. There are a few things you can do to streamline the process, as explained below.

Best practices for drafting & signing fee agreements

1. Use automation to streamline drafting and reduce errors

Law firms will pretty much always use standardized templates for their fee agreements. But for each new client you take on, you will have to replace the names, contact info, fee amounts, and other details related to the specific client and matter throughout the template.

This process can be tedious and prone to errors, as staff members tend to move hastily through these documents.

Nothing is more unprofessional than sending a fee agreement out with the name of a past client in it, so these errors can be costly in terms of your professionalism and reputation.

Client intake software offers easy-to-use document automation tools that can replace all the information in your fee agreement templates with relevant info for a specific client automatically.

This helps cut down on non-billable admin hours, and most importantly helps prevent embarrassing mistakes that can occur during the drafting process.

2. Use e-signatures to eliminate paperwork & create a seamless client intake process

Today, more and more people tend to use their mobile phones to do everything—from ordering takeout to paying their taxes. Asking them to download your fee agreement, print it, sign it by hand, scan it, and email it back puts a major burden on them.

With e-signature software, you can streamline the process of getting fee agreements signed by clients. Clients can simply click a link on their mobile phone or computer, draw or type in their signature, and click a button to submit the signed copy back to the firm.

The entire process of gaining an e-signature takes a matter of seconds, compared to printing and scanning which could take hours or days, depending on whether your client has easy access to a printer and scanner.

Since signing the fee agreement is such an important step in the intake process, it's critical to make it as easy as possible for your clients in order to ensure you get hired. Plus, you can save a significant amount of money on printing costs by going paperless.

Check out Clio Grow's document automation and e-signature solution, which also integrates with Clio, for more information.

3. Open a matter to track upcoming tasks and deadlines

Once the fee agreement has been signed, the sales cycle concludes, and your processes shift from lead management to case management. The biggest thing to consider at this point are any key events or deadlines that might be coming up for the client's case.

Failing to calendar these events can expose your firm to serious liability. At this time, it's a good idea to open a matter in your case management software, schedule any deadlines or events on your calendar, and assign important tasks to members of your staff.

Clio Grow makes it simple to transition from managing a lead to managing a case. It's easy to convert a "lead" into a "client" within Clio Grow, and all the data you captured during the intake process can be exported to open a matter in Clio that's ready for billing. This ensures consistency in your data, and also eliminates the burden of duplicate data entry.

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!

Final notes on the client intake process

Legal client intake is a key part of the client lifecycle, and creating an organized and repeatable process is essential to your firm's sustained growth.

Clearly defining key stages of the client intake process at your firm makes it easier to identify bottlenecks and inefficiencies, so that you can improve the process. A law firm client intake process flow chart that outlines these steps can go a long way in elevating your efforts.

Most client intake processes would be similar to the following:

- Lead acquisition and nurturing
- Scheduling and conducting consultations
- Collecting and storing information
- Drafting and signing a fee agreement

Think about each stage carefully and focus on creating a streamlined process. The ultimate goal is to save time for your staff, while improving the experience for clients. Not only will this make your firm more efficient, but it will also help maximize your conversions

and drive revenue.

If you're ready to automate your firm's client intake process, using client relationship management (CRM) software integrated with your practice management system is invaluable. Clio Grow streamlines intake, providing less friction for new clients, while eliminating duplicate tasks by seamlessly transferring client information into Clio Manage, reducing errors and enhancing efficiency. Book a Clio demo today and boost your firm's client intake workflow.

Frequently asked questions

What information does legal client intake include?

Client intake should include a client's contact information, current employment status, income, details about their legal matter, as well as opposing party names and information.

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.