BE Simple

STAFFING

FREE INDUSTRY PLAYBOOK

The law firm intake playbook

A briefing document for law firms that want new-matter calls answered, intake completed, and consultations booked — without anyone on the desk giving legal advice.

besimplestaffing.com

A briefing document for operators. No invented statistics.

Why a missed intake call is hard to get back

In a law firm, a new matter often starts with a phone call, not a form. Someone who has just been in an accident, served with a complaint, or told they need counsel will try the next firm that picks up if yours goes to voicemail. During the day, attorneys are in court or in meetings. After hours, the front desk is closed.

Message-taking is better than nothing, and a shared legal answering service can be the right buy for light overflow. It is a weaker fit when you want the person on the line to complete your intake, start a conflict check, and book a consultation in Clio, MyCase, PracticePanther, or Lawmatics.

This playbook helps you write those rules down. It does not invent conversion rates or "cases saved" statistics, and it is not legal advice.

Decide what "answered well" means

- Take a message and send it to the intake coordinator.
- Complete your intake form and book a consultation, with the right questions asked.
- Route an urgent existing-client matter to the on-call attorney, with a clear notification path.

Those are three different services. Mixing them up is how firms buy a cheap plan and still miss a complete intake — or let a receptionist stray into legal advice.

How a dedicated agent should work

A dedicated intake agent represents your firm, not a generic call center. At BE Simple Staffing the agent works from our Prishtina office on the hours you purchase, including US evenings and weekends when that is when new-matter calls arrive.

Before they take a live call they should know: your practice areas, any geography or court limits you care about, the intake questions and conflict-check steps, consultation lengths and booking rules, fees the agent may mention if you want them mentioned, and the exact line between information-gathering and legal advice.

On a new-matter call

- Greet in the firm's name and take the facts your intake form requires.
- Record the conflict-check information you specify.
- Book a consultation, or schedule a callback with an attorney, according to your rules.
- Set only the expectations you have approved — timing, what to bring, whether a consult fee applies.

On an existing-client or after-hours call

- Follow your written protocol, not improvisation.
- Take a message, book time, or collect a document when that is the request.
- Notify the on-call attorney the way you specify if the situation meets your definition of urgent.
- Log what was promised, to whom, and when.

The agent does not interpret statutes, discuss case strategy, quote a likely outcome, or tell a caller whether they have a claim. They do not quote a fee you have not approved or waive a conflict. If a question is not in the playbook, they take a complete message and route it to an attorney or intake coordinator at the firm. If you already use an AI receptionist, a human can sit behind it for the calls the bot cannot finish, or you can staff the line directly.

Coverage, briefing, and pricing context

US business hours coverage is $1,995 a month per dedicated agent, with a one-agent minimum and no setup fee. After-hours or 24/7 seats are $2,395 a month; true 24/7 coverage uses four agents. There is a three-month term, then month-to-month. Founding clients receive 50% off the first month. Most teams are live in two to four weeks. Full detail: besimplestaffing.com/pricing.html.

A dedicated seat costs more than a small bundle of answering minutes. It also does more, if you use it for complete intake rather than as a voicemail substitute. If you only need lunch-break overflow, a shared service may be enough.

Briefing checklist. Practice areas and any geographic limits; intake questions and conflict-check steps; consultation lengths, calendars, and fees the agent may mention; software access; after-hours definition of an urgent existing-client matter and the on-call path; a hard rule that agents never give legal advice; and a short sample of “good” and “bad” call outcomes.

Next step

To talk through a dedicated intake desk, write to Jon Kludt at jon.kludt@varosity.com or use besimplestaffing.com/contact.html. Mention your practice areas, the software you use, whether you need after-hours coverage, and how new-matter calls are handled today.

The longer public page is “Law firm intake answering service,” at besimplestaffing.com/use-cases/law-firm-intake-answering-service.html.

BE Simple Staffing is a San Diego company with our own office in Prishtina. This playbook is a briefing aid, not a contract and not legal advice, and it does not invent proof of matters won or lost.