BDI Ops

From inquiry to paid client.

A practical guide to law firm intake



Contents

Introduction 2
Answer the inquiry 4
Check fit and book 9
Explain the work and fees 16
Send the agreement and confirm payment 21
Find where progress stops 31
Choose and test a fix 42
Check the results 52
Worksheet 1: Follow one inquiry 61
Worksheet 2: Review a conversation 65
Worksheet 3: Match the problem to a fix 68
Worksheet 4: Agree on what you're counting 70
References and source notes 73
About BDI Ops 75

Introduction

I'm Daniel Bijan. I've worked in U.S. immigration intake, screening prospects and booking attorney consultations. I now help law firms improve how they handle inquiries, explain their services, follow up, and bring new clients into the firm.

At BDI Ops, we build intake processes, set up CRMs, and train intake staff and closers. We also review calls and coach teams on the conversations they handle each day.

In one law firm project, intake conversion improved over the first three months:

Month	Gain over the starting conversion rate
First month	3 percentage points
Second month	5 percentage points
Third month	5.5 percentage points

Each figure compares that month with the starting rate. The gains are not added together.

This guide explains the work behind better intake. You'll follow EB-1 inquiries from the first message through consultation, agreement, payment, and onboarding.

You'll learn to spot unanswered inquiries, ask questions that prepare the attorney, explain fees, and follow up on what a prospect still needs to understand. You'll also learn how to check whether the problem calls for a clearer process, a software fix, more staff time, or coaching.

Use the four worksheets with your own records. Give each next step an owner and a due time, test one change, and check what happened to payments, costs, and staff time.

01

Answer the inquiry

Worked example: Maya and Andrew

Friday, 09:00, Week 1. Maya, a materials researcher, fills in an immigration firm's contact form. She uploads her CV and asks:

> *I'm looking at EB-1. I have research publications and do journal reviews. Can an attorney assess my background? I'd like to know what the process would involve and what it would cost.*

Andrew, a robotics researcher, sends another firm a similar request that morning. Both are currently in the United States and want someone to assess their work before they commit to a legal fee. Follow what happens when their inquiries reach two different intake teams.

Maya waits five days

Maya receives no automatic reply. Her inquiry sits in an unchecked inbox across the weekend. The intake employee is also covering phones and existing-client calls. There is no set time for callbacks and nobody assigned to cover new inquiries when that employee is busy.

The first human call comes the following Wednesday at 09:00, in Week 2. Five days have passed: 120 elapsed hours. The caller asks, "What's your budget? Are you ready to start?"

"I sent this on Friday. I've already booked with another firm. Please close my inquiry."

The caller records her request and closes the inquiry. Maya never books with this firm.

Andrew gets a useful call in three minutes

Back on the first Friday, Andrew receives an automatic reply at 09:01. At 09:03, an intake coordinator calls and checks whether he has time to talk.

"You asked about EB-1. What are you trying to work out before deciding whether to speak with an attorney?"

Andrew wants to know whether his research background is worth a closer review and what evidence the firm would need. The coordinator explains what the consultation can cover, asks the questions needed to route his inquiry, and records the points the attorney must assess.

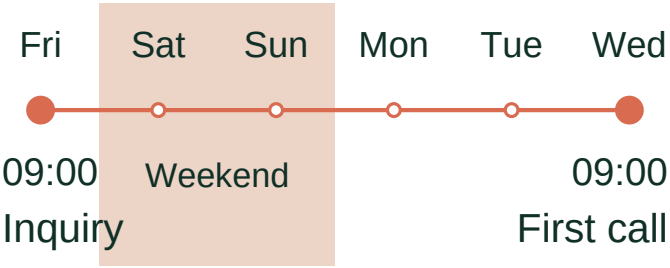
Figure 1

Five days versus three minutes

Maya

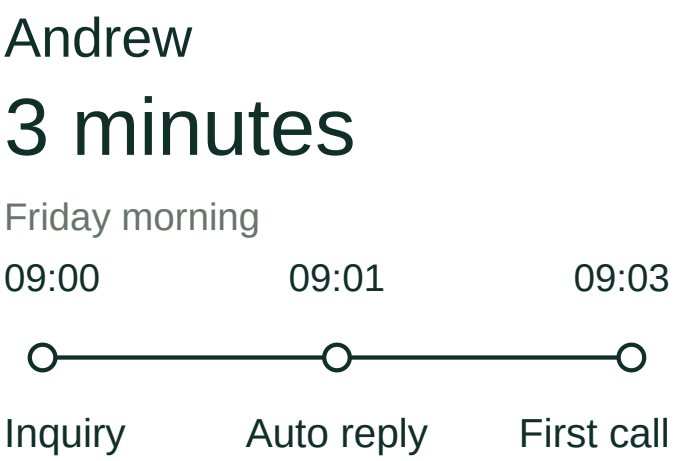
5 days

No automatic reply



Phones and existing clients take priority. No callback cover.

Figure 1 (continued)



Andrew gets an automatic reply in one minute and a real conversation in three. Maya hears nothing for five days. Her record needs to show that wait, including the days when no reply was sent.

Record the automatic reply, attempted calls, and first completed conversation separately. The three-minute response here is a staffed-hours example. To make that possible in your firm, someone needs to own new inquiries and have cover when they are already on a call.

Speed gets the conversation started. The questions that follow determine whether it helps. Clio's 2024 study looked at both replies and the information firms supplied about costs and next steps. 1

Check what your report calls a response

Call the number or submit the form a prospect uses. Compare that experience with the record created. 5

A phone system may mark a call "answered" when its recorded greeting starts. If the caller then reaches a full voicemail box, that label hides the failure. Check the call path and staff cover before deciding an employee needs coaching.

Include closed hours. A promise of a callback the next morning needs a task, a named person, and enough time in their schedule. If the message lands in a shared inbox, check who sees it and what happens when that person is away.

02

Check fit and book

Sofia books without knowing what to prepare

On Monday of Week 2 at 10:00, Sofia, a biomedical researcher, asks the firm that lost Maya's inquiry for an EB-1 assessment. Intake calls at 10:15 and focuses on budget and readiness to pay. She accepts a $250 consultation on Friday at 11:00 without a useful explanation of the meeting or how to prepare.

Those answers won't tell the attorney what work she does, which route needs review, or whether a date needs urgent attention.

The note says, "EB-1. Asked price. Friday 11:00."

It leaves out what she wants assessed and what she expects the $250 consultation to provide. When Friday arrives, the attorney has to collect that information again.

Price belongs in the conversation. Asking it before understanding the request makes it easier to mistake an unanswered question for unwillingness to buy.

Andrew gets questions with a purpose

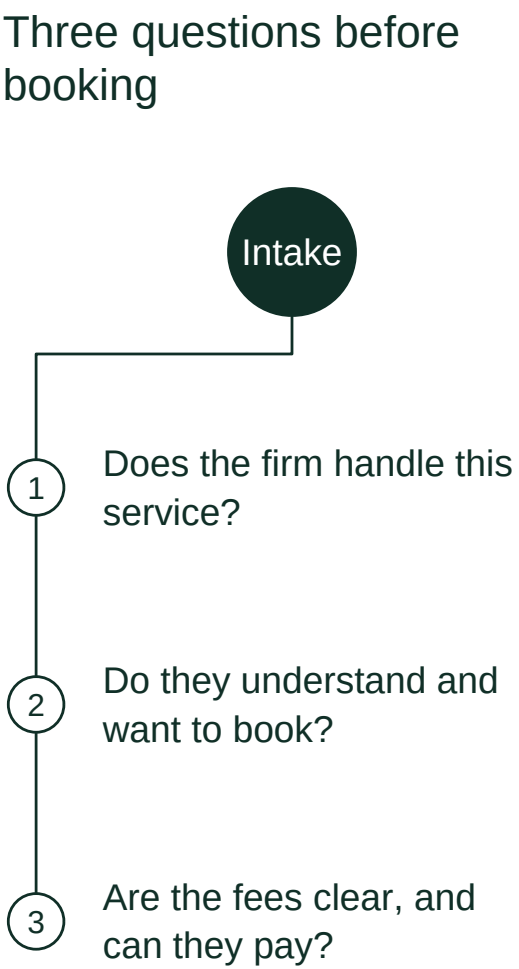
Andrew's coordinator first asks what he wants to understand. Then the call gathers enough information for the attorney to prepare:

- What work do you do, and what part of it do you want the attorney to assess?
- Are you looking at an application based on your own work, or is an employer involved?
- Where are you currently based? Is there a notice, status date, or other deadline the attorney should see?
- Have you applied before, and can you share a current CV and links to the work you mentioned?

Each answer changes the preparation. The employer question helps route the review. A notice or date needs an attorney's attention. The CV and links give the attorney something to inspect before meeting.

EB-1 covers different routes, including extraordinary ability, outstanding professors or researchers, and certain multinational managers or executives. 6 "Interested in EB-1" is the start of the inquiry, not a finding that someone qualifies. Staff gather the facts; the attorney evaluates them.

Figure 2



A missing answer needs a check before the team decides what happens next.

Keep service fit, willingness to book, and payment separate. Andrew can want an assessment without being ready to hire the firm for the whole petition. Asking what the fee covers doesn't show that he cannot afford it.

If an answer is missing, record the question and who will check it. Don't turn "not yet known" into "not suitable" just to clear the task list. 5

Make the appointment clear before booking

The coordinator explains the $250 consultation: the attorney will discuss Andrew's background, review the material requested in advance, identify questions needing more work, and explain whether the firm can offer a service. It does not include preparing an EB-1 petition.

Andrew books the following Monday at 11:00, in Week 2, after the required checks. The note preserves what he wants from the meeting: an assessment of his background and a clear explanation of the proposed work and fees.

Figure 3

What happens before you book?

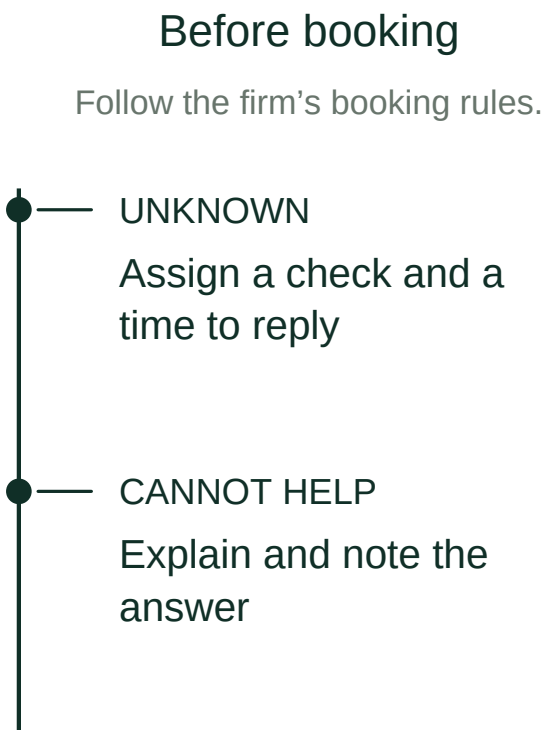
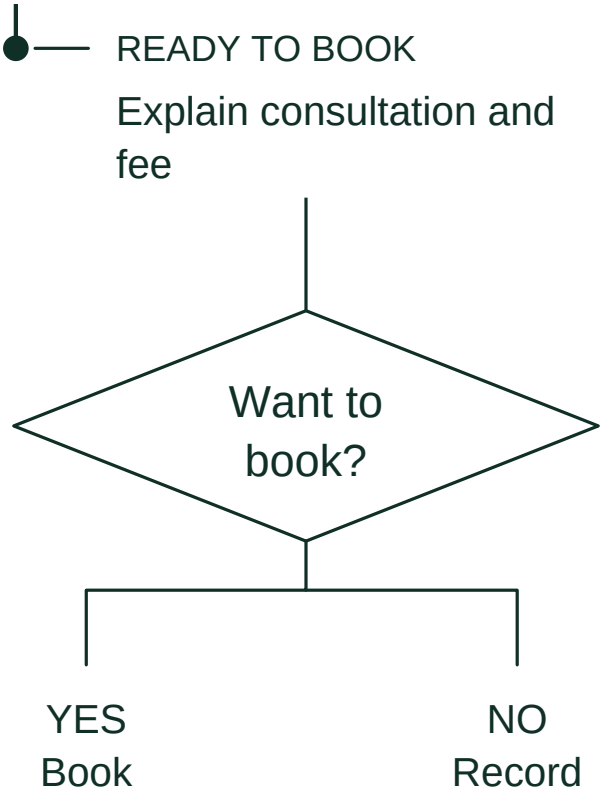


Figure 3 (continued)



Follow the firm's booking rules. Get attorney decisions where needed and respect a request to stop contact.

Write down what must be checked before staff offer a time. If something needs review, assign it to a person with a time to reply. A rule that says only "check eligibility" asks staff to

make a legal judgment they may not be equipped to make. Name the facts to collect and the attorney who reviews them.

Send preparation that helps the meeting

Sofia receives a calendar invitation. It gives Friday's time, but no explanation of what to bring or what will happen.

Andrew receives Monday's time, meeting link, fee, and rescheduling contact. Through the firm's portal, he is asked for his CV, links to the research and journal-review work he mentioned, and any prior filing or notice relevant to the attorney's review. The request says whom to contact if he cannot find something. 4

03

Explain the work and fees

A reminder helps the person attend. Preparation helps them and the attorney use the time. These jobs can share a message, but repeating the appointment time doesn't explain the meeting. 5

Ask only for information the team will use at this stage. Explain why it is needed. The attorney reads the notes before the consultation, confirms what has changed, and starts with Andrew's questions instead of asking him to repeat the first call. 4

Sofia's $250 consultation takes place on Friday of Week 2 at 11:00. Her intake notes focus on whether she has a budget and is ready to hire. They say little about what she needs to understand before making that decision. The attorney has to fill in those gaps during the meeting.

Andrew's $250 consultation takes place earlier that week, on Monday at 11:00. His notes include his CV, publications, journal-review work, location, and any deadlines he mentioned. The attorney can check those details and ask about gaps. Intake has gathered material for that review; it has not decided which EB-1 route fits or whether Andrew qualifies.

Both researchers need a clear agenda: discuss their situation, explain the proposed work, cover fees, and agree on the next step. Before ending, check what remains unanswered and who will answer it. A meeting can feel helpful while still leaving the person unable to decide what they would be buying. 4

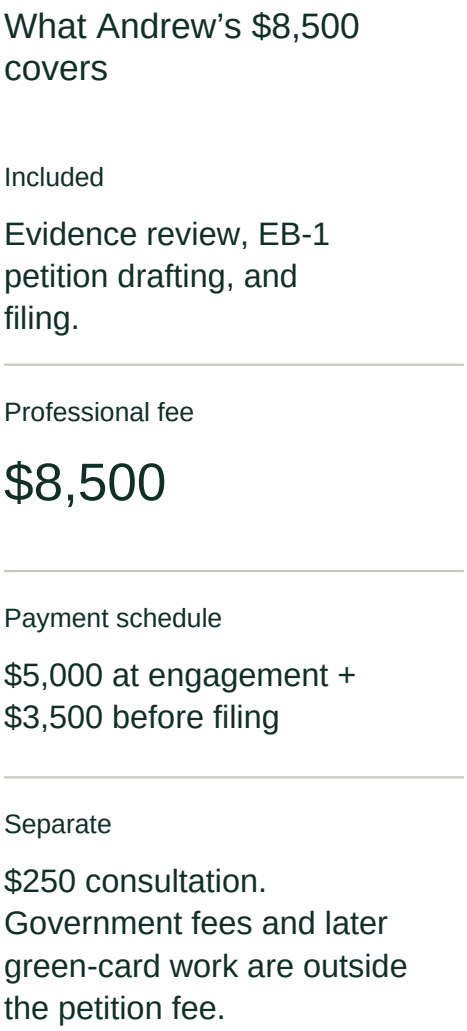
Show what the fee covers

Sofia hears an $8,500 professional fee. The explanation stops there. She does not have a clear list of the work, other charges, or payment dates. Asking whether she can afford it now would ask her to judge a price she cannot fully explain.

Andrew receives the offer in separate parts:

- **Work:** review evidence, draft the agreed EB-1 petition, and file it.
- **Professional fee:** $8,500, with $5,000 paid first and $3,500 before filing.
- **Outside this price:** government fees and work on the later green-card stage.
- **Consultation:** the earlier $250 is separate.

Figure 4



The work, payment dates, and exclusions belong together. The $250 consultation is separate from the $8,500 petition fee.

The attorney explains where the petition work ends and puts the limits in writing. Petition work and the remaining immigration process are separate steps; calling the whole offer "your green card" would hide that distinction. 6

These details help Andrew plan. He can see both what is due now and what he must budget for later. They also give staff an approved answer to repeat. Questions about an added service or a change in legal work go back to the attorney.

For work priced by estimate, explain what could change the amount. Missing records or an added request may change the work needed. Name those unknowns and explain how the firm would discuss added work. Andrew's $8,500 offer covers the agreed petition work; an estimate for a different service should be labeled separately. 4

Record what they said before deciding what it means

Sofia asks, "Does that cover everything?" The note becomes "price concern." That label drops the question the firm needs to answer. Nothing in it shows whether she lacks money, doubts the value, or simply wants the full cost.

A more useful note would keep her words:

> *Asked what the $8,500 includes. Needs a written explanation of the work, other charges, and payment dates.*

Now a colleague can see what is missing. "Send another reminder" would not complete that task. Someone must supply the explanation first.

Andrew's record holds the approved work and payment terms alongside his consultation notes. That does not mean every question is settled. It means the next person can check what he was told instead of starting again.

Let the answer guide the next step

A price question can call for very different replies. If someone thinks $8,500 buys only form filling, explain the actual evidence review and drafting involved. If they understand the work but cannot make the first payment, discuss only options the firm offers. If they need time, ask whether they want another contact and agree on when.

These concerns can overlap. A clearer explanation can resolve confusion while leaving a real budget problem. Staff should check what changed in the person's understanding before deciding the concern is settled. 4

For Sofia, the missing step is still a clear written offer. For Andrew, the approved terms are ready to send. Neither consultation, by itself, proves that the person has agreed to hire the firm. The next chapter follows what happens to each agreement and to the questions that remain.

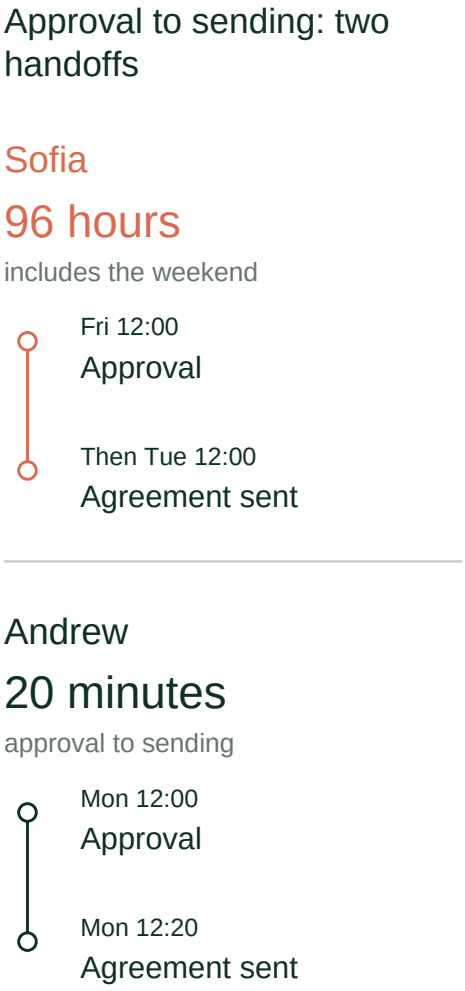
04

Send the agreement and confirm payment

Find where work waits between people

Sofia's attorney approves sending her agreement on Friday of Week 2 at 12:00. It goes out on Tuesday of Week 3 at 12:00: 96 elapsed hours, including the weekend. Andrew's attorney approves his on Monday of Week 2 at 12:00, and the coordinator sends it at 12:20: 20 minutes later.

Figure 5



The 96-hour wait includes the weekend. A complete handoff names the approved terms, sender, and due time. Spacing is

not to scale.

Sofia's note says "send agreement," while the status says "awaiting reply." Until Tuesday noon in Week 3, the firm is waiting on its own work. Sofia cannot respond to an agreement she has not received.

Andrew's task tells the coordinator what to send:

> *Send the attorney-approved EB-1 petition agreement. Include evidence review, drafting, and filing; $8,500 professional fee; $5,000 first payment and $3,500 before filing. Keep government fees, later green-card work, and the $250 consultation separate. Record delivery and route new legal questions to the attorney.*

The task has a sender and the approved document attached. Someone who missed the consultation can act without rebuilding the offer from scattered messages.

Clear roles help even when one employee does several jobs. Intake keeps questions and next contact visible. The person handling paperwork sends the approved terms and checks delivery. The attorney decides the legal work. A small firm can assign those jobs without hiring a separate person for each. 5

The two waits point to different records to inspect. Check whether Sofia's approved terms were available, whether a task reached a named sender, and whether that person had time. Ninety-six elapsed hours are not 96 working hours. The comparison alone does not tell you how much delay a new task or another employee would remove.

Explain the agreement when you send it

Andrew's Monday message points to the work covered, the payment schedule, and the items outside the price. It gives him a place to ask questions. The coordinator checks that the file opens and that delivery has not failed.

Sofia receives her agreement on Tuesday of Week 3 without follow-up. Sending closes one task, but it does not tell the team whether her cost question has been answered. The record should keep that question open until someone checks.

A delivery receipt proves neither understanding nor agreement. If written terms differ from the consultation, explain and resolve the difference before asking the person to sign.

Give follow-up a clear purpose

On Tuesday of Week 2 at 09:00, Andrew asks:

> *"Does $8,500 include USCIS fees, and what is due now?"*

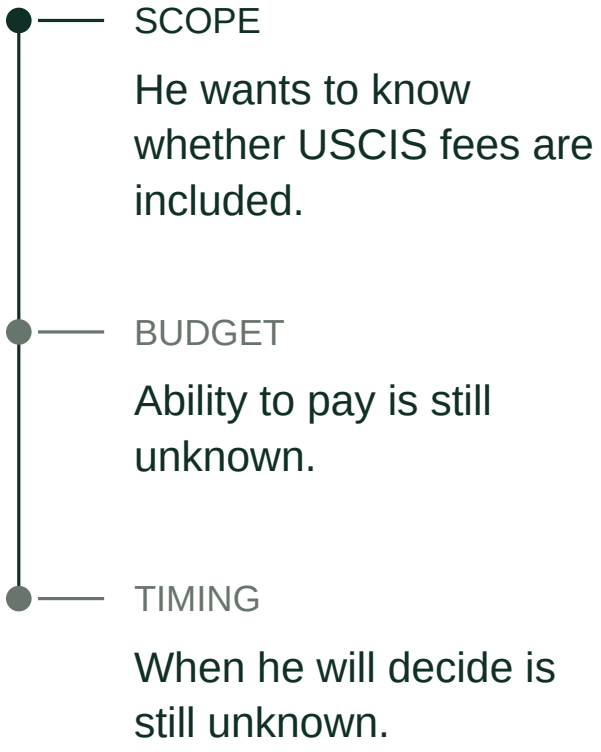
Figure 6

Answer the question Andrew asked

> “Does $8,500 include USCIS fees?”

What does this question tell us?

Figure 6 (continued)



A question about what is included does not prove Andrew cannot pay or needs more time.

At 09:20, the coordinator answers in writing and links the approved terms:

> *"$8,500 is the professional fee for the petition work listed in your agreement. USCIS fees are separate.*

> *The first payment is $5,000, with $3,500 due before filing. Your $250 consultation is separate, and this agreement does not cover the later green-card stage."*

The message answers both parts of his question. It does not offer a discount or tell him that asking about price shows weak commitment. If he needs the current government charges explained, staff should get the attorney's approved answer rather than guess an amount.

At their agreed Tuesday 15:00 follow-up, the coordinator checks whether anything remains unclear. The purpose is to help Andrew decide, not to keep asking for a signature. Useful follow-up carries the answer someone needs and records any next step they agree to. 5

Sofia receives no follow-up. Her record therefore cannot show whether she understood the offer, needed a different payment plan, or chose another firm. Those possibilities remain open. Respect a refusal or request to stop; silence alone does not supply either one.

Keep sent, signed, and paid separate

Andrew signs on Wednesday of Week 2 at 10:00. At 10:15, his $5,000 first payment arrives. The $3,500 balance remains due before filing. The $250 consultation has its own record.

Figure 7

A signature, a payment, and a next step

Sofia

Friday after sending, 17:00

Agreement

Unsigned

Petition payment

None recorded

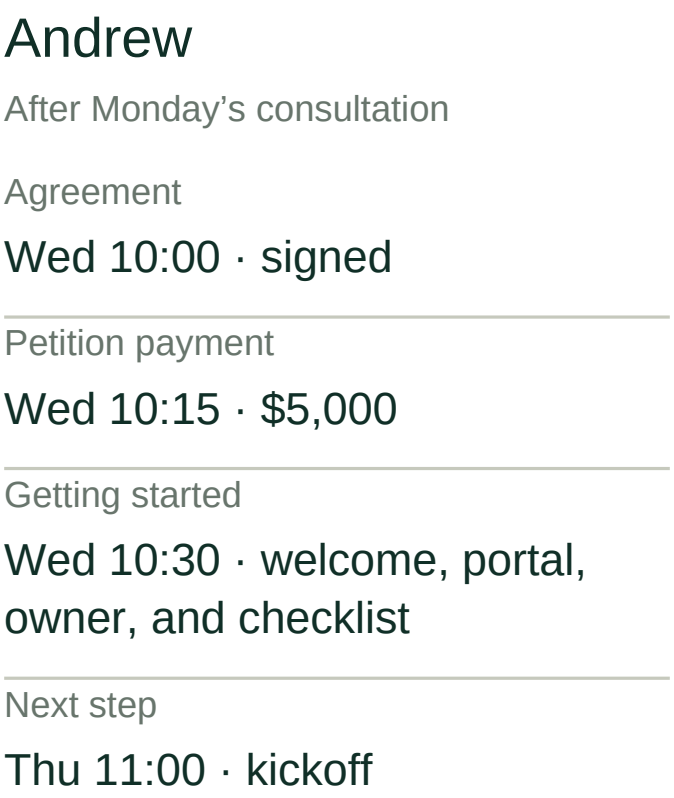
Getting started

No follow-up

Next step

Outcome unknown

Figure 7 (continued)



Track the petition payment separately from the consultation. Then confirm the client has a contact, access to the portal, and a next step.

At 10:30, he receives access to the welcome portal, the name of his case coordinator, and a document checklist. At Thursday's 11:00 kickoff, they confirm which documents are available, which are missing, and who takes the next

step. He knows where to send questions and how the work begins.

The checklist should connect each requested item to the agreed work. Already supplied material should be marked received, so Andrew can focus on what is missing. The coordinator gathers and tracks it; the attorney reviews its legal use.

By Friday of Week 3 at 17:00, Sofia's agreement remains unsigned and there is no service payment. Her $250 consultation does not count as payment for the later work. The outcome is unknown, not a confirmed lost client.

Andrew's next step is the petition work. The team has received $5,000 of the $8,500 professional fee and still owes the work listed in the agreement. Keep that open work visible after marking intake complete.

05

Find where progress stops

Maya asked the firm to close her inquiry after booking elsewhere. Sofia's agreement is still unsigned at 17:00 on Friday of Week 3. There is no service payment and no follow-up. Her outcome is unknown. Andrew has signed, made his first payment, and received a clear next step. To understand the difference, follow the work behind those outcomes.

Read the contact history, consultation notes, attorney's decision, and later messages together. Find the last confirmed step.

Compare the record with the caller's experience

Maya receives no automatic reply and waits five days, or 120 hours, for human contact. Andrew receives an automatic reply in one minute and speaks with someone after three minutes. Keep missing replies visible alongside completed contacts. Compare each recorded step with what the person received, understood, and agreed to. 5

An appointment report may show a missed consultation when staff only sent an invitation. Check whether the

person agreed to the time. If staff marked it "booked" without an answer, stronger reminders address the wrong problem. The booking rule needs to say what confirms an appointment.

An empty “agreement sent” field might mean no agreement went out. It might mean someone sent it outside the CRM. Look for the message before calling it a missed task. Mark unchecked records as “not yet checked.” Once you know what happened, fix either the missing work or the missing record.

Keep unknown inquiries separate from poor fits

A web form with only a name and phone number tells you little about fit. Even “researcher asking about EB-1” leaves questions for the attorney. Keep missing answers under “need more information,” with a named person responsible for getting them. Staff can gather the required information; the attorney decides eligibility. 5

For a confirmed poor fit, record the request, why the firm cannot help, and what staff explained. Keep the inquiry in the count: it still used staff time. Repeated requests for a service you don't offer may reveal a confusing ad or webpage. 4

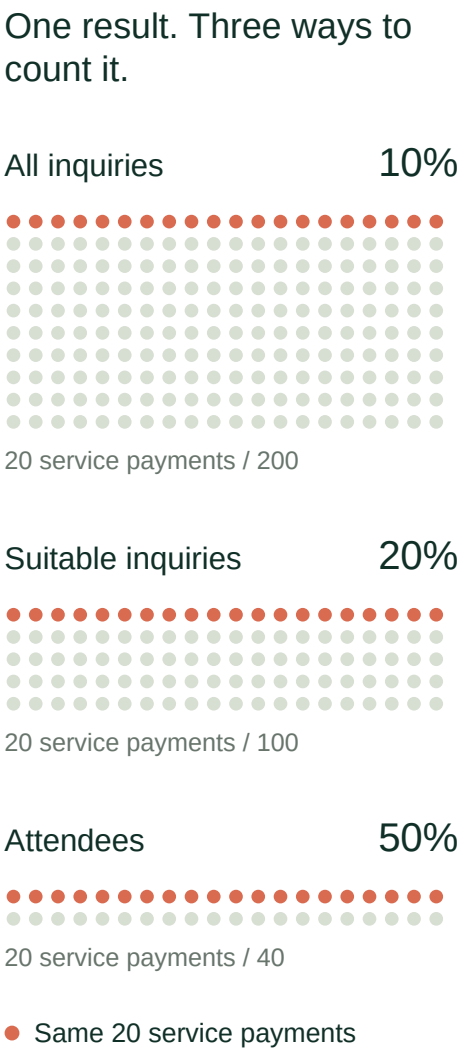
Record every inquiry, including those that never book. Keep the source, contact dates, current step, next action, and reason for any decision. “Didn't answer” describes contact. It doesn't establish poor fit. Changing that label

just to close a task would hide unfinished work and change your reported results.

Be clear about who you count

Keep repeat contacts under the same inquiry. If a prospect calls about a CV they already sent, that is another contact attempt, not another new lead. Linking the events preserves the history and keeps your starting count accurate.

Figure 8



The same 20 people paid. The rate changes with the starting group. Inquiries left out still take staff time.

Start with 200 inquiries. Of those, 100 meet the firm's rules for a suitable inquiry. Forty attend a consultation, and 20 make a first payment. Those 20 payments equal 10% of all inquiries, 20% of suitable inquiries, or 50% of attended consultations.

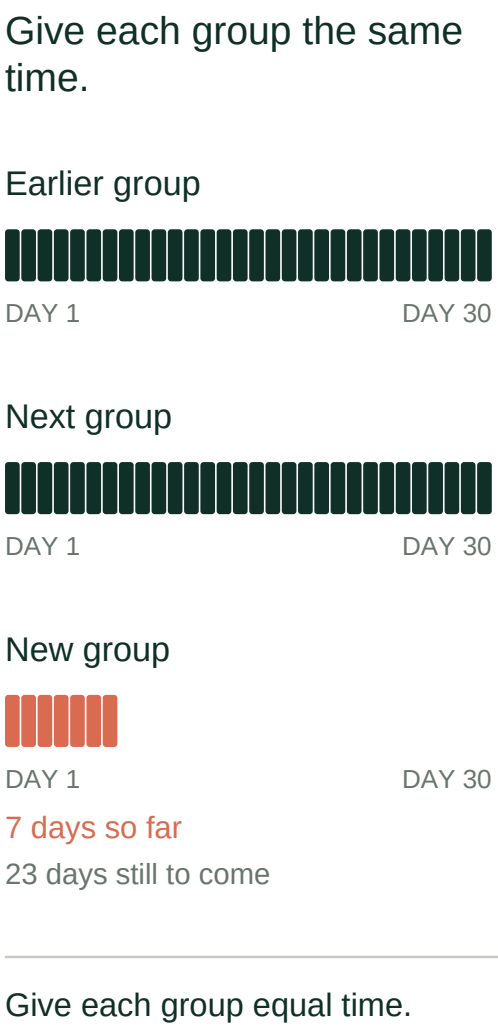
Each rate answers a different question. The first covers the whole path from inquiry to payment. The second asks what happens to people the firm could help. The third looks at what follows a consultation. Write the starting group beside the rate so readers know which question you answered.

Agree on fit rules before reviewing results. If staff call someone unsuitable only after they don't buy, the rate can rise without another sale. Read the reasons behind those labels, especially uncertain ones. Keep enough of the person's words to check the decision later.

Give people the same time to decide

A payment this month may come from last month's inquiry. Dividing this month's payments by this month's new inquiries mixes different groups. New prospects may not have had time to reach a decision.

Figure 9



Observation window: 30 days. Choose a period that fits decisions at your firm. Show later payments separately.

Group inquiries by when they arrived, then give each the same time to reach payment. The figure uses 30 days. Keep a group that's only seven days old separate because it has had less time.

Choose a time limit that fits decisions at your firm. Record and report later payments separately; don't change the rule for one group alone.

Keep today's task list separate. An inquiry may be too recent to judge while still needing a call today. The task list guides the work; older groups help you judge results.

Two firms, the same result

Compare Firm A and Firm B. Each gets 100 suitable inquiries and 20 first payments for work offered after consultation. Consultation fees are separate. Both have a 20% conversion rate. Assume similar services, similar lead sources, and equal time to decide.

Figure 10

Same rate. Different places to look.

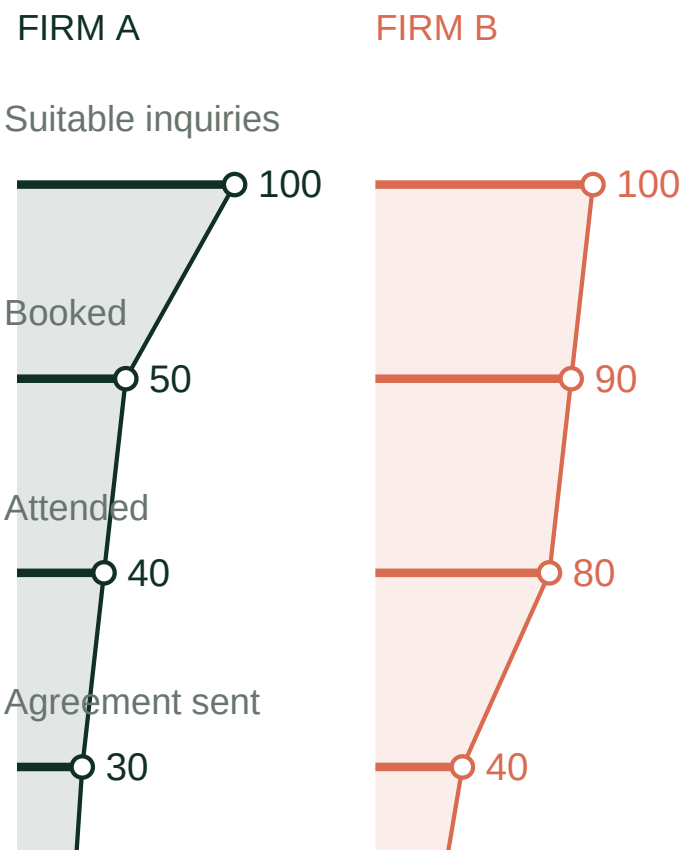
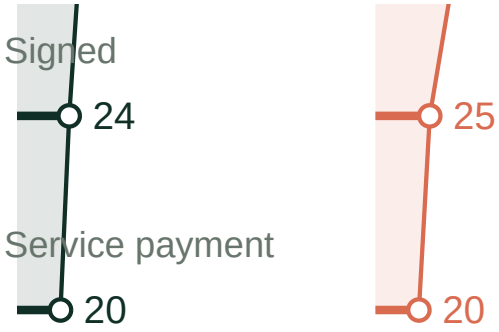


Figure 10 (continued)



20% of suitable inquiries reach service payment

Of those who attended:
A 50% / B 25%

Compare similar inquiries with equal time to decide. Consultation fees are separate. Counts show where to look, not why people stopped.

Firm A books 50 consultations, and 40 people attend. It sends 30 agreements, gets 24 signatures, and receives 20 first payments. Firm B books 90 consultations, and 80 people attend. It sends 40 agreements, gets 25 signatures, and receives 20 first payments.

At Firm A, start with suitable inquiries that never booked. Compare the attempted contacts with what callers

experienced. Then check appointment availability and what staff explained about the consultation fee. Each finding suggests a different problem: reaching people, finding a usable time, or explaining the appointment.

Firm B holds twice as many consultations for the same number of payments. Start with the attorney's notes after each meeting. Separate people who needed no further work, matters the firm declined, people still deciding, and people waiting for paperwork. Without that split, “didn't hire us” hides several different events.

Of attendees, 50% pay at Firm A and 25% at Firm B. That doesn't prove A sells better. Its booking rules may be stricter, or the consultations may serve a different purpose. Check inquiries turned away as well as those who attended. Fewer appointments alone don't prove improvement. Check the time saved, the suitable inquiries lost, and whether that tradeoff fits the work the firm wants.

Choose what you will check after a change

Write down the step, starting group, and time limit before making a change. Keep counts beside percentages. One extra payment can move a small group's rate sharply. Compare similar services and lead sources before comparing staff who handle different inquiries. A referral may arrive ready to book; an ad inquiry may need basic information.

For agreement sending, keep approval and sending times, plus agreements still waiting. Sofia's Friday approval in Week 2 becomes a sent agreement on Tuesday of Week 3,

both at 12:00: 96 hours, including the weekend. Andrew's Monday 12:00 approval in Week 2 becomes a sent agreement at 12:20. Check staff schedules and task history before judging either wait. Counting only finished tasks leaves unfinished work out; guessing missing dates hides gaps in the record.

06

Choose and test a fix

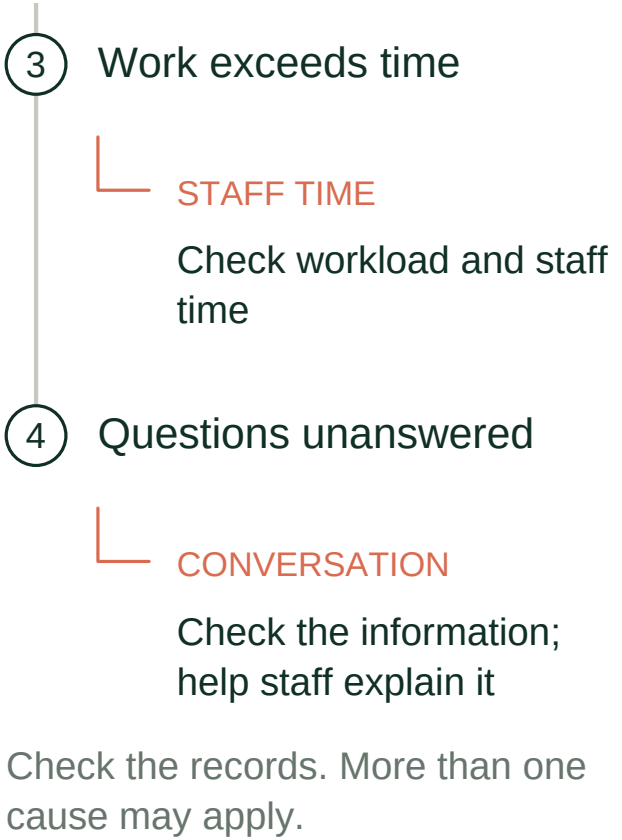
The review should now point to a specific gap. Perhaps nobody owned the next step, the software missed a task, staff lacked time, or a conversation left a question unanswered. Choose a change that addresses the gap you found.

Figure 11

Find the cause before choosing a fix.

1. No clear next step
   - PROCESS
     Agree who does what next
2. Agreed task missing
   - SOFTWARE
     Check setup and task history

Figure 11 (continued)



Check the records first. More than one cause may apply; a small change by your team or software provider may be enough.

Separate the kinds of work before adding people

Intake includes different jobs. Administrative work covers updates, scheduling, and existing-client calls. Screening collects the information needed to decide whether to book. The conversation about hiring explains approved services and fees and helps someone reach a decision. These tasks need different information and skills. 5

Write down who handles each function in your firm. One person may handle more than one; the list isn't a demand for three hires. Maya's intake employee covers phones and existing clients without a protected callback time or backup. New requests wait while other work gets done. Check what happens when those jobs compete. If an existing-client call interrupts a fee discussion, who finishes the discussion and records the next step?

Give each function a clear finish. Screening is ready to hand over when the required answers and unresolved questions are recorded. Sending an agreement is finished when the approved version has gone out and the record shows it. “Handle intake” leaves too much for staff to work out alone.

Define the test and the cost before you commit

For Sofia's handoff, the test is concrete: approval creates the right task, staff can find it, and absence cover works. Agree who will check that before comparing proposals. Ask who decides the steps, changes the software, approves messages, and checks later use. Include your team's time to answer questions, review work, and learn.

Work out what would cover the cost. For extra clients, use money left after the extra cost of serving them, not the full quoted fee. Check when money arrives and when bills are due. Try several reasonable cost estimates if you're unsure. This shows what must happen to break even; it doesn't predict that it will.

Turn the handoff into a working rule

Sofia's record said "send agreement" and "awaiting reply," with no sender or due time. Approval sat without a clear owner. After sending, nobody followed up. Those are two separate gaps: getting the agreement out and helping the prospect with the next decision.

Andrew's path shows a clearer handoff: approval reaches the sender, the agreement goes out, and a later billing question receives an answer. Use that sequence to define the work. His 20-minute sending time belongs to this story; set your firm's deadline based on its staff and workload.

Write a short rule with the people doing the work: what starts the task, who receives it, what information they need, and when it is due. Name a backup for absences. If approval or fee details are missing, identify who gets them. Staff should be able to find the rule while doing the task. 5

Ask an employee to walk through it on a test inquiry. Watch where they leave the record to find information or ask another person. Those pauses show what the instructions left out. Let the employee suggest a clearer step, have the responsible person approve it, and update

the shared copy. Keep its date so staff can tell which version to use.

Try a normal approval, an absent employee, missing information, and an attorney decision not to proceed. The rule should give each a clear next step. It should never turn missing approval into permission to send.

Fix the software fault you can show

If the agreed rule says approval creates a task, check that it does. Look at the approval record, the task history, and the assigned account. A task that never appears needs a different fix from one sent to an unused account.

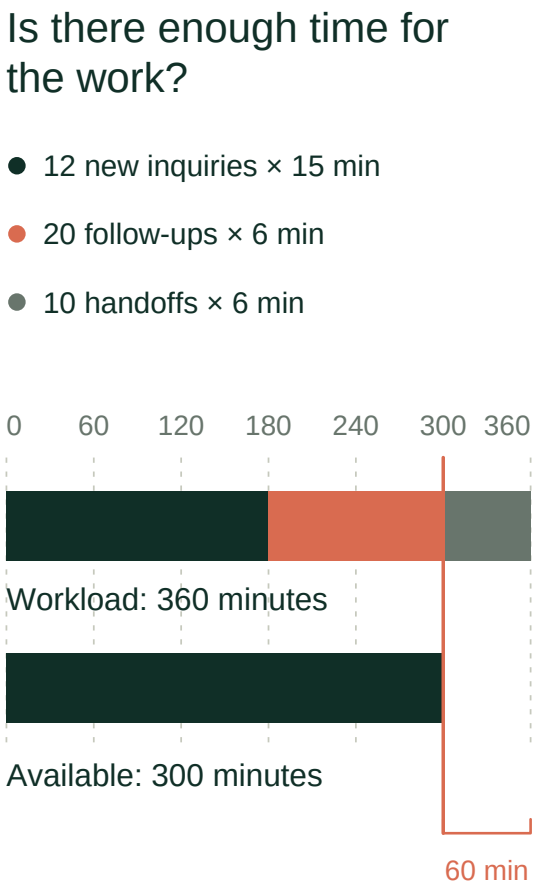
Repeat the fault with an approved test record. Make the smallest change that addresses it, then try normal and unusual cases again. Ask staff to find the task from their usual screen. A task that exists but is hard to find can still be missed.

Check what help your software provider offers before buying a larger project. Lawmatics offers training and help with software use and work processes. Check the scope and price; don't assume those services are included in routine support. 3

Measure the work against the time available

Ask staff to record actual time for representative tasks, including notes and updates. A call lasting six minutes may require more work after the caller hangs up. Use those observations to estimate the workload, then compare it with time staff have for that work.

Figure 12



Check task times, repeated counts, and busy periods before deciding whether staffing needs to change.

On this sample day, 12 new inquiries take 15 minutes each. Twenty follow-ups take six minutes each, and 10 handoffs take six minutes each. The total is 180 + 120 + 60 = 360 minutes. The person has 300 minutes available, leaving a 60-minute gap before unexpected work.

The 300 minutes already excludes meetings, other duties, and planned breaks. Don't subtract them again. If a follow-up includes a handoff, count those minutes once. Otherwise, the workload looks larger than it is.

Before hiring, look for repeat entry, missing information, or work someone else could handle. Remove avoidable work and measure again. If the gap remains, change the staffing or schedule. Check arrival times too: enough hours across the day won't cover calls that all arrive during consultations.

Coach the moment that needs work

Andrew's Tuesday billing question gives you a specific moment to review. Did staff explain what was due now and later? Did the answer separate professional fees from government fees and the consultation? Did they check what remained unclear before agreeing on the 15:00 follow-up?

First check that the approved explanation was available. Missing information needs an answer from the firm. If the employee had it but couldn't explain it clearly, rehearse the exchange. One person plays the caller, another answers, and a third listens for the chosen skill. Stop where the answer becomes unclear, give feedback, and try again.

Change the caller's wording so the employee practices listening, not just repeating a line. 5

Then review later calls or notes the firm is allowed to use. Did the employee use the skill when it mattered? Did the response fit the question? A practice session shows training took place; observed work shows whether it carried over. A later sale alone proves neither.

If practice goes well but calls don't, ask the employee to show the screen and documents used during the call. Outdated fees, missing notes, or constant interruptions may explain the difference. Fixing access to information may help more than another rehearsal.

After testing the change, look for unfinished tasks and new problems elsewhere. Faster sending helps little if staff must correct more agreements afterward.

07

Check the results

A shorter wait, more clients, and more money left need separate checks. A handoff fix may work before you can judge its effect on sales. More sales also bring work and costs.

Compare with the starting point

Use the groups, time limits, and definitions from Chapter 5. Compare later records with those from before the change. Keep the actual dates: “agreement prepared” and “agreement sent” are different events.

Keep all three inquiry records. Maya asked to close hers after booking elsewhere. Sofia has an unsigned agreement and no service payment at the Week 3 Friday review. Her missing follow-up is work to address; her final decision remains unknown. Andrew has a signature and first payment. Neither Maya's choice nor Sofia's silence proves a poor fit.

For later inquiries, check approval-to-sending time and agreements still waiting. Show elapsed time and time during staffed hours. If waits fall, inspect the records.

Clearer handoffs, better staff cover, or different inquiries could each explain part of the change.

Record changes to ads, fees, staffing, or appointment availability before crediting the handoff fix. Keep counts beside rates. A few decisions can move a small group's percentage sharply without showing a lasting change.

Check the start of the work too

Andrew signs Wednesday of Week 2 at 10:00 and pays at 10:15. At 10:30, he receives a welcome message, portal access, a named owner, and a document checklist. His Thursday 11:00 kickoff is confirmed. Check those items separately from payment so a paid client doesn't wait without instructions.

Opening a matter isn't the same as preparing or filing the petition. Record who has the next task, what documents are missing, and when the next contact is due. These are steps your team can check; none tells you that a visa has been approved.

Separate the cost of winning work from doing it

Put each bill or hour under the work it supports. Ads, intake calls, and booking help bring in clients. Preparing documents and handling a matter deliver the service. Both use resources, but improving one doesn't remove the cost of the other. 5

For cost per new client, divide the marketing and intake costs by the matching client count. With 20 first payments, divide by 20. Dividing by 200 inquiries gives cost per inquiry instead. Name the measure, period, and costs included. Don't switch between signatures and payments when comparing results.

Use a consistent way to divide costs shared by services or groups. An ad bill alone leaves out time spent answering and following up. If you can't link all spending to a group, label the calculation an estimate. Don't present a monthly spending total as proof of one campaign's performance.

For delivery costs, record each person's actual hours on the matter. Multiply those hours by that person's cost to the firm, then add other direct costs. Use the firm's labor cost, not the rate charged to clients. Include review and corrections, not just the first draft. This helps explain why two similar fees can leave different amounts after the work is done. 5

A share of salary helps you understand work costs. It isn't automatically extra cash paid for a new client. Keep that estimate separate from the cash check below.

Count the money and the costs

Andrew's $5,000 first payment is part of the $8,500 professional fee for EB-1 petition preparation. Another $3,500 is due before filing. Government fees and the later green-card stage are outside this offer. His $250 consultation is separate. Receiving the payment doesn't mean the preparation is finished or all fees are earned. Sofia's consultation payment likewise isn't a payment for petition preparation.

For this calculation, assume the money is available for the firm to use. It isn't money the firm must keep aside. Assume the costs shown are paid in the same period.

Figure 13

What is left after the costs?

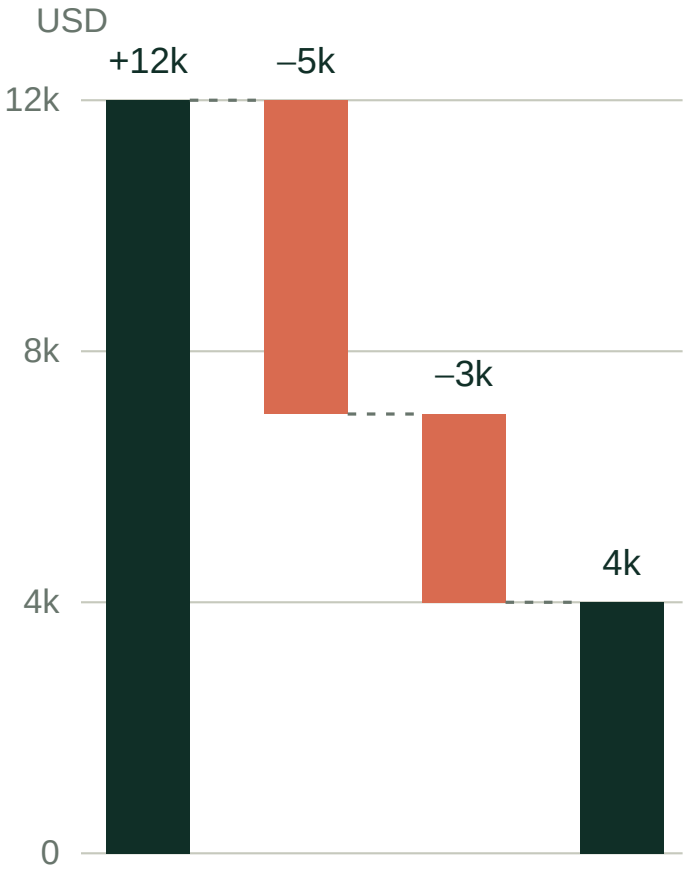
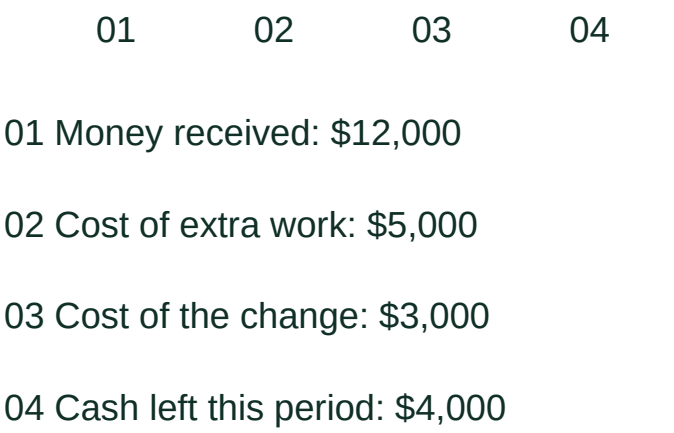


Figure 13 (continued)



Cash left is not profit or fees earned. Check unpaid bills, work still owed, and what caused the extra money.

The firm receives $12,000 more during the period being checked. It pays $5,000 more to do the client work. The improvement costs $3,000. That leaves $12,000 - $5,000 - $3,000 = $4,000.

The $4,000 is cash left after these costs. It doesn't by itself show profit, earned fees, or proof that the project caused the increase. Check what else changed and what bills remain unpaid. Include any extra software, outside help, paid hours, and client work the change requires.

Money received now may cover next month's work. List that work and likely costs; update them as bills arrive. Ask your accounts person which money is available and how to

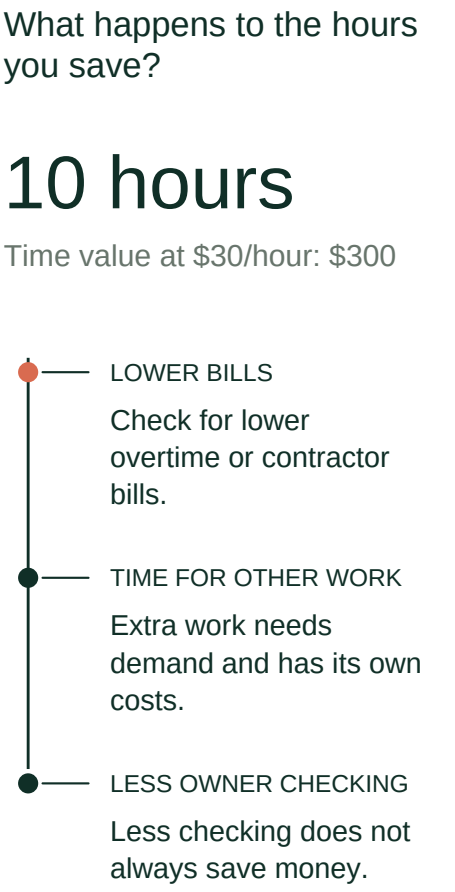
record it. Include time spent learning and checking the change, even if payroll stays the same.

Find out where saved time went

Measure time before and after on comparable work. Keep the number and type of tasks beside the hours. Fewer total hours may simply mean fewer inquiries. Include checking, corrections, and work passed to another employee so a saving in one person's list doesn't hide extra work elsewhere. 5

Suppose a clearer handoff removes ten hours of repeat work. At a value of $30 per hour, that time is worth $300. It doesn't mean the firm spent $300 less.

Figure 14



Saved hours are not always lower spending. Count each benefit once.

Follow the hours into the work schedule. If salaries stay the same, the team has more time for other tasks. If overtime that would have been paid is avoided, spending can fall. If staff serve more clients, count the extra money received and the extra cost of doing their work.

Check whether the time is usable. Scattered five-minute gaps may not create a consultation slot. A block of freed time might. If the owner spends less time chasing tasks, record that benefit without inventing revenue for those hours.

Count each gain once. If you use actual hours after the change, don't subtract the saved hours again. If you've counted extra money from work done in the freed time, don't also add the full value of those hours as another gain. Your record should show what happened: fewer paid hours, usable time, or more completed work.

Worksheet 1: Follow one inquiry

Use the inquiry's ID instead of a client name. Start with the records, then ask the team about anything missing. A blank field doesn't prove the work was missed. Use one time zone. For each wait, say whether you counted all hours or only hours the team was working.

Step	Date and time	Record to check	Who did it?
Inquiry arrived			
First reply			
First useful conversation			
Consultation booked			
Confirmation and useful preparation sent			
Consultation attended			

Step	Date and time	Record to check	Who did it?
Attorney approved the next step			
Agreement sent			
Agreement signed			
First payment for later work (not the consultation fee)			
Welcome message, portal, coordinator, and checklist sent			
Kickoff held and next step agreed			
Person said no, asked to wait, or asked for no more contact			

Last step you can confirm:

Consultation outcome: offered work, declined, or awaiting which decision?

What could the person do after the last reply?

What happens next, and who does it?

Due date, time zone, and who covers an absence:

Approval still needed; who will get it, and by when:

How and when the prospect agreed to hear from you:

Any pause or stop-contact request, and the action taken:

What don't you know yet, and who will check?

Keep the history and the next task together. If a task needs approval first, give someone the job of getting it.

Worksheet 2: Review a conversation

Use a recording or transcript your firm is allowed to review. You can also use a supervisor's notes from the call. Keep the person's exact words in the firm's system. Write your own explanation separately, so a guess doesn't look like something they said.

Question	What you found
What did the prospect want to understand?	
What did they hear or receive? Does the record match?	
What did staff ask before explaining?	
What work, fee, or next step did staff explain?	

Question	What you found
What was still unclear? How do you know?	
Was a missing answer treated as a reason to reject the inquiry?	
Did a legal question go to the attorney?	
Did the prospect agree to another call or message?	

One skill to practice:

The exact moment to replay, and a better question or explanation:

What else could explain the problem?

What would show improvement on a later call?

A person can get a clear, helpful answer and still choose not to buy. Check whether staff gave correct information, answered the question, and respected that choice. A sale alone won't tell you whether they did those things well.

Worksheet 3: Match the problem to a fix

Write down what happened first. “The team needs training” is a suggested fix. It doesn't describe what went wrong.

Example: an agreement was ready but remained unsent. Check whether the sender received the approved terms and a task. A missing task calls for a different fix from a complete task nobody had time to do.

What happened?	Why might it have hap pened?	What would you check?	What small fix could help?

Who will check?

What would show that our first explanation was wrong?

When will we test it and check the result? What should change?

Test the usual steps and one case that goes differently. Someone might be away, instructions might change, or a prospect might say no. Check whether the team still knows what to do.

Worksheet 4: Agree on what you're counting

Question	Your answer
Which inquiries are in this group, and when did they arrive?	
What service did they need, and where did they come from?	
What makes an inquiry a fit for the firm? Have those rules changed?	
How will you handle duplicate or missing records?	

Question	Your answer
How much time will each person have to decide?	
What result are you counting: bookings, signatures, or payments?	
Which two counts will you use to work out the percentage?	
How many are still deciding, said no, or have missing details?	

Money received in each period:

Extra costs for the work, software, staff, and changes:

Costs to win the work versus costs to complete it:

Money you can't use yet, bills due later, and work still owed:

Hours before and after, time spent checking or correcting, and what freed hours were used for:

Which bill fell, if any?

Other changes that might explain the result:

Say what the records show. “The task now appears and gets done on time” can be a useful first result. Two different months won't, by themselves, prove the change brought more clients.

References and source notes

Sources checked November 2, 2026. The Wisconsin Bar handout informs the booking, preparation, and consultation lessons. SMB Team's book informs the checks on caller experience, staff roles, practice, and costs. We apply those ideas throughout the walkthrough and worksheets.

1. Clio: Are Law Firms Failing at Marketing and Client Engagement? Research from 2024 on replies and useful information.
2. Clio: Highlights from the 2024 Legal Trends Report Methods for the same study: Lux contacted 500 firms from June 20 to July 5, 2024.
3. Lawmatics: Professional Services Undated service description, used only to confirm training and process help are offered.
4. J. David Krekeler and Daniel J. Krause. Ten Things to Include in Your Client Intake Process. Wisconsin Solo & Small Firm Conference, 2023. Ideas used: purposeful intake questions, preparation before the meeting, clear fee explanations, and a record of every inquiry.
5. Bill Hauser and Andrew Stickel. Law Firm Growth Accelerator, second edition, June 2026. Ideas used: test the contact path, separate missing information from

poor fit, assign clear jobs, practice real conversations, and count the cost of delivering the work.

6. U.S. Department of State: Employment-Based Immigrant Visas. Undated official guidance, checked November 2, 2026. Used for the distinction between EB-1 routes and between a petition and the later immigration process. It does not set the example firm's fees or establish either person's eligibility.

About BDI Ops

We help law firms build intake processes, set up their CRM, and train their team in sales and follow-up. If you want help finding where work gets stuck or choosing a fix, book a free 30-minute call.