BDI Ops

Grow your firm. Get your time back.

The law firm owner's field guide



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Choose the next change your firm needs.

A full calendar can hide a weak business. Some matters take too much time. Some campaigns bring the wrong inquiries. The owner keeps answering questions that the team should be able to handle.

Start with one service and one problem you can check in your records. Work through the guide with the person who runs the day. Then use the four worksheets to choose a 90-day plan.

Attract

Reach people who need the work you want.

Convert

Help suitable prospects make an informed choice.

Deliver

Give the team the time and authority to follow through.

Keep

Check the money left and the hours the owner gets back.

In this guide

Choose cases and capacity

Pick a channel and check the economics

Improve the website, consultation and follow-up

Know the money and delegate the work

Run a weekly review and a 90-day plan

Put the plan on paper: four worksheets

Choose the work you want more of.

List your main services. For each, review collected fees, delivery hours, direct costs, payment delays and the owner's involvement. Include difficult matters as well as easy ones. A large fee can still leave little after the work.

Define a suitable matter

Write down the service, jurisdiction, client need and work your firm can competently deliver. Name the limits too. The attorney makes legal fit decisions; the team follows approved screening and conflict-check steps.

Check capacity by role

Estimate the hours available after existing matters, leave, meetings and routine work. Check attorney review, paralegal work and client communication separately. Capacity is limited by whichever role runs out first.

10 matters

Capacity before any buffer

120 available paralegal hours / 12 hours per new matter = 10. If attorney review can support only six, plan around six. Leave room for delays and rework before setting the intake target.

Set an owner-time target

Choose one recurring duty to hand over. Name where the freed time should go: focused legal work, business planning or time away. Track actual owner hours each week.

> *This week: review ten recent matters in one service. Choose the kind you want more of and confirm how many the team can take on.*

Pick a channel for a clear reason.

Ask recent clients how they first found you and what made them contact the firm. Compare their answers with your records. Keep both the first source and the source of the inquiry when they differ.

Channel	Use it to test	What to check
Search ads	People looking for a service now	Search terms, suitable inquiries, paid matters and total cost
Search content	Questions people ask before choosing counsel	Useful visits that become suitable inquiries; time and writing cost
Referrals	Existing trust in people who know your work	Source, fit, consistency and permitted referral arrangements
Social / video	An explanation people need before they search	Qualified conversations and eventual clients, as well as reach

Keep a channel that already brings worthwhile work while you test one addition. Give each test a named owner, a

fixed budget and a review date. Include the staff time it takes.

Write the test in one sentence

> *For [service] in [market], we will test [channel] with [offer], spending no more than [amount], then review [measure] on [date].*

The responsible attorney should approve advertising, solicitation, testimonials and referral arrangements under the rules that apply to the firm. ABA Model Rule 7.1 is a starting point, not a substitute for local rules. [1]

> *This week: choose one audience, one service and one channel to test. Write what would make you stop, change or continue.*

Follow ad spend all the way to paid work.

Follow one campaign and one group of inquiries through completed fixed-fee matters.

Stage	Count
inquiries	80
suitable	40
consultations attended	24
paying clients	8

Campaign cost	Amount
Advertising	$4,000
Management, creative and tracking	$1,000
Total acquisition spend	$5,000

$5,000 / 8 paying clients = $625 acquisition cost per client

Completed work	Amount
8 matters x $4,000 in earned fees collected	$32,000
Less variable delivery costs: 8 x $1,500	-$12,000
Contribution before acquisition spend	$20,000
Less the campaign's acquisition spend	-$5,000
Left to cover overhead and profit	$15,000

The ad-only cost per inquiry is $50. That number leaves out management costs, fit and whether anyone pays. The $15,000 above still has to cover fixed costs; it is not net profit. Count owner work consistently in your cost model.

If only four clients paid, acquisition cost would be $1,250 each. Do the lower-result version before you approve a budget. Track open matters and collection delays separately.

Make the next step easy to understand.

A visitor should be able to tell whether the firm handles their problem and what happens if they contact you. Use the words clients use when they ask for help.

Give each service a clear page

- Say who the service is for and where the firm can help.
- Explain what the first conversation covers, who runs it and whether it has a fee.
- Show real attorney information and proof you have permission to use.
- Answer common questions about the process, preparation and scope.
- Use one clear next step, with a working phone or form.

Test the full contact path

Use a phone to submit the form and call the number. Confirm that the inquiry reaches the right person, the visitor sees a useful confirmation and the next task appears. Test outside office hours too.

> *Example confirmation: We received your request. Our intake team will contact you during [stated office hours] to discuss the next step. For [defined urgent issue], use [approved route].*

Only publish a response commitment your team can meet. Ask for enough information to route the inquiry, and provide a secure way to share documents when needed.

Google supports measuring later events after an ad click or call. Have the person responsible for tracking check the current setup and permitted data use. Do not upload legal details or client documents to ad platforms. [2]

> *This week: have someone unfamiliar with the firm try to contact you from their phone. Fix the first point where they get stuck.*

Help the prospect make a clear decision.

The consultation should leave a suitable prospect understanding the proposed work, the fee and what happens next. A signature obtained through confusion creates work later.

1. Understand the need

Ask what brought them to the firm, what they need to decide and which dates need attention. Confirm what the attorney must review.

2. Explain the proposed work

Describe the scope, what is excluded, who does the work and what the client must supply. Keep legal advice with the attorney.

3. Make fees clear

Explain the fee, payment timing and separate costs. Provide the approved terms in writing.

4. Check understanding

Ask what remains unclear. Answer the actual question before deciding that price or commitment is the problem.

5. Agree the next step

They may proceed, need an answer, need time or decline. Record their decision and any agreed follow-up.

> *When someone asks, 'What is due now?', answer the payment question. Do not turn it into an argument about how serious they are.*

Review a small sample of consultations with the staff member. Use notes or recordings only where permitted. Choose one moment to improve, such as explaining exclusions or closing with a clear next step.

> *This week: check five recent consultation records. Can another team member tell what was offered, what remained open and who acts next?*

Give every open decision an owner.

A prospect can be waiting for the firm while the team believes it is waiting for the prospect. Separate internal work from a client's decision. 'Awaiting reply' is useful only after the promised information was sent.

Keep a short decision record

Field	Example entry
Open question	What is included in the proposed fee?
Needed answer	Attorney-approved scope and payment terms
Owner	Assigned intake coordinator
Due time	Tuesday, 10:00, firm's time zone
Next contact	Tuesday afternoon, as agreed
Done means	Terms delivered; question answered or routed

Follow-up should carry the information the person needs. If they want more time, agree whether and when they want to hear from you. Respect a refusal or request to stop contact.

Keep signed, paid and started separate

After an agreement is signed, confirm the payment status under its terms. Then assign the work, send the welcome information and check that the client knows the next step. A paid status does not show that onboarding happened.

Check the oldest open items every week. Ask whether the problem is missing information, no owner, a software fault or too much work for the available time. Each needs a different fix.

> *This week: inspect ten open prospects. Replace vague statuses with an open question, a named owner and a due time.*

Know what the work leaves behind.

Keep signed fees, earned revenue and collected money separate. They answer different questions. Your accountant should define how they appear in the firm's reports, including money held for clients and work still owed.

Use two views

By month	By service or client group
What came into the operating account?	What revenue did this work earn?
What bills and payroll are due?	What variable cost did it take to deliver?
What money is available to use?	What did it cost to win these clients?
What is already committed?	What remains for overhead and profit?

Contribution = revenue - variable costs

Divide contribution by revenue to get the contribution margin. In the campaign calculation, $20,000 / $32,000 = 62.5% before acquisition spend.

Contribution helps cover fixed costs and profit. Define the costs consistently before comparing services. For campaign decisions, also subtract acquisition spend without counting it twice. [3]

Match money to the work

A deposit may arrive before most of the work. A campaign's invoices may arrive before any client pays. Keep the time periods visible. A strong-looking month can still leave a cash gap later.

Review outstanding collections and expected costs with the person responsible for the books. Ask which fees are earned, which funds are available and which costs remain. Avoid treating a bank balance as profit.

> *This week: build one simple service-level view with your bookkeeper or accountant. Agree the definitions before adding targets.*

Hand over a decision, with clear limits.

When every small choice returns to you, the job has not fully moved. Pick one repeat task that a trained person can own within clear limits. Keep legal judgment and required supervision where they belong.

1. Name the result

For example: every approved agreement is sent, delivery is checked and the record is updated by the agreed time.

2. Give the person what they need

Provide approved templates, access, training, time and a backup. Walk through a real example together.

3. Set decision limits

Say what they may decide alone and what must come back to you. Include deadlines or unusual facts that need prompt review.

4. Agree the evidence

Check a few completed records at a set review time. A task marked done should point to the actual result.

Keep a one-week interruption log

Each time someone needs your help, note the task and why it came back. Look for missing instructions, missing authority, skill gaps or lack of time. Ask the team which one applies before changing the process.

Count the time you spend checking and correcting the delegated work. If a new task saves two hours but adds two hours of supervision, the time has moved rather than disappeared.

> *This week: use worksheet 3 for one recurring task. Set the first review date and decide where the freed owner time will go.*

Use a scorecard that leads to a decision.

Set a short weekly review with the people who own marketing, sales and delivery. One person prepares the numbers. Use a monthly financial review for the fuller cost and profit picture.

Check weekly	Use it to ask
Suitable inquiries by source	Are we attracting the work we chose?
Consultations booked and attended	Where are people waiting or dropping out?
Signed matters and first payments	Are clear decisions becoming paid work?
Earned fees collected; money due	Are collections following the agreed terms?
Unassigned or overdue work	Where does delivery need attention?
Owner hours on repeat tasks	Is responsibility moving to the team?

Check weekly	Use it to ask
Available capacity by role	Can we deliver the work we are trying to win?

Keep the counting fair

Weekly activity counts show workload. To judge conversion, follow the same group of inquiries over the same time window. Do not divide this week's payments by this week's new inquiries if they are different people.

Record unknown outcomes separately. Small samples can move sharply with one client. Read the underlying records before changing a campaign or blaming a staff member.

Finish with a task

Choose the most useful change, name an owner and set a due date. Next week, check whether it happened and what changed. Keep the previous action visible until it is resolved.

> *This week: use worksheet 4 for a first review. Leave missing data blank and assign someone to find it.*

Build in an order the team can handle.

Days 1-30 / Choose and prepare

Choose one service and a clear target. Review recent work, costs, capacity and owner time. Repair the contact path. Pick one channel test and one task to delegate.

Days 31-60 / Run the test

Launch within the agreed budget. Review inquiries, consultations, collections and delivery each week. Coach the specific conversations that need work. Record every meaningful change.

Days 61-90 / Keep, change or stop

Give the inquiry group time to mature. Compare actual costs, suitable clients and collected fees. Check delivery quality and owner hours. Continue only if the economics and capacity support it.

Set the limits before you start

Write a budget cap and a condition for pausing. A broken contact path, unmanageable backlog or unresolved tracking error deserves attention before more spend. Keep the reason for each decision in the weekly record.

Use ninety days as a planning cycle. A long sales cycle or a search-content project may need more time. Separate what you can check now from what remains open.

> *Choose a review date now. Bring the four worksheets, the numbers and the person responsible for the next action.*

Choose your growth focus.

Complete this for one service. Use recent records; write 'unknown' where the evidence is missing.

Service and client need we want more of

Work we will not take on, and why

What recent matters show about fees, costs and owner time

Capacity by role, including the current workload

Our 90-day target and the evidence we will use

The main constraint we will address first

One channel to test, owner, budget cap and review date

Before spending more, confirm that the firm can deliver the work. A target should include a limit on owner workload and a check on client service.

Check what one campaign must earn.

Use a defined group of inquiries and a fixed observation window. Keep a lower-result case beside your working estimate.

Input or result	Working case	Lower-result case
Ad spend + management + creative + tracking		
Other acquisition costs included		
Total acquisition spend (A)		
New paying clients (B)		
Acquisition cost per client (A / B)		
Revenue from this work (C)		
Variable delivery costs (D)		

Check what one campaign must earn.

Input or result	Working case	Lower-result case
Contribution before acquisition (C - D)		
After acquisition spend (C - D - A)		
Fixed costs still to cover		
Cash timing and work still owed		

Source records, date range and cost definitions

What would make us pause, change or continue?

When B is zero, cost per paying client cannot be calculated. Show the spend and zero clients. Review revenue, collections and cost treatment with your accountant; deposits and trust funds need separate handling.

Give one repeat task a new owner.

Complete this together. Check that the person has the skills, access and time to own the task.

Task and the result that counts as done

Named owner and backup

What starts the task, and when it is due

Decisions they may make without asking

Questions or risks they must bring back

Give one repeat task a new owner.

Templates, access and training they need

Records we will review, and the review date

Owner hours now; hours after training and review

Where the freed time will go

Review the first few completed examples. Widen authority only when the work supports it. Keep legal decisions and supervision with the responsible attorney.

Make the next week easier to run.

Week ending / people present / record owner

Measure	This week	Previous week	Note
Suitable inquiries			
Consultations attended			
New signed matters			
First payments received			
Earned fees collected			
Overdue or unassigned tasks			
Owner hours on repeat tasks			
Capacity for new work			

Make the next week easier to run.

Last week's action: done, blocked or still open?

The main issue the records show

Our next action / owner / due date

How we will know the action helped

These are activity and workload checks. Keep conversion analysis by inquiry group and cost/profit reviews separate. Do not treat a missing number as zero.

Bring a real problem to the next conversation.

You do not need a perfect report to begin. Bring the service you want to grow, a few recent records and the recurring task that keeps returning to you.

If you speak with BDI Ops, use the worksheets to describe what needs work. Ask which part of the plan we would own, what your team would do, how support would work and how progress would be checked. Agree the scope and monthly fee before starting.

Book a free 30-minute call

Sources and use notes

[1] American Bar Association, Model Rule 7.1. The rule addresses false or misleading communications about a lawyer's services. Local rules govern the firm.

[2] Google Ads Help, About offline conversion imports. Later events can be connected with earlier ad interactions; check Google's current setup and data requirements.

[3] US Small Business Administration, Break-even point. Reference for variable costs, fixed costs and contribution in break-even planning.

Use qualified advisers for the firm's legal duties, accounting treatment and financial decisions.

BDI Ops | November 2026. You may copy the worksheets for use inside your firm.