Law firm intake checklist

Use this with your intake supervisor. Start with today's inquiries and overdue tasks.

01 Record each inquiry

- [ ] Check calls, forms, email and referrals. Find an existing record before adding another.
- [ ] Record the source, contact details, date received and current status.
- [ ] Use approved screening questions. Send legal questions to an attorney.

02 Assign the next step

- [ ] For each open inquiry, record one owner, the action and its due date.
- [ ] Make the task specific: "Alex will send the attorney-approved next steps by Tuesday at 2 p.m."

03 Check follow-ups

- [ ] Review tasks due today and overdue. Check the last contact, any reply and the next step.
- [ ] Reassign work when someone is away. Record and honor requests not to be contacted.

04 Check consultation handoffs

- [ ] Record the attorney-approved next step, such as an agreement, payment step or another call.
- [ ] Record missed consultations and assign the next action. Separate requested appointments from confirmed ones.

TODAY'S OPEN ITEMS

ACTION	OWNER	DUE

Finish the review

Use the boxes to spot gaps, then assign one change for your team to make.

05 Record the outcome

- [ ] Use consistent statuses for awaiting reply, declined, matters the firm cannot take and signed clients.
- [ ] Track signing and payment separately. Record the reason an inquiry ended when known.

06 Review a permitted call

- [ ] Did the team member use approved screening questions and fee wording?
- [ ] Did they send legal questions to the attorney and agree on a clear next step?
- [ ] Does the record match the conversation? Pick one change to practice and review it on a later call.

07 Before the day ends

- [ ] Check unanswered inquiries, overdue tasks and records missing an owner or next step.
- [ ] Assign each one to a person and due date. Raise repeated problems with the supervisor.

ONE CHANGE TO MAKE

Action: _____

Owner: _____ Due: _____

Attorneys approve legal decisions, fees and client messages. Your supervisor manages the daily work.

Discuss your intake process