FOR LAW FIRMS WITH ONE TO FIVE LAWYERS

From Inquiry to Prepared Consultation

When someone reaches out to your firm, they may not know what to expect. This guide helps you take care of those first conversations while giving your current clients the attention they need.

1 Capture · 2 Respond · 3 Screen & book · 4 Prepare · 5 Follow up

> Every open inquiry needs an owner, a next action, and a date.

01 **Capture and respond** — Page 2
One shared list, clear ownership, and a useful first response.

02 **Screen, book, and prepare** — Page 3
A short path to the right appointment and a prepared lawyer.

03 **Follow through** — Page 4
A practical cadence for prospects and existing clients.

04 **Tools you can use** — 5–6
Six sample messages, a scorecard, and your first improvement.

01 · CAPTURE AND RESPOND

Give every inquiry a home. Then give it a useful answer.

The first step is to get the person into your system so you can keep track of them. Then let them know you heard them and when they can expect to hear from you.

Know who will get back to them

Keep calls, emails, forms, and referrals in one secure place. Link to the original message so you can pick up the conversation without making someone repeat it.

Decide who will respond. If it's you, set aside time to check the list and arrange cover when you're away. If someone else takes over, make the handoff clear.

Choose a response target your coverage can support, such as a personal reply within one business day. State when after-hours inquiries will be reviewed.

Keep the first record short

- Name and preferred contact method
- Date received and inquiry source
- Broad service requested and location
- Any date or urgency the person reports
- Names needed for a conflict check
- Owner, stage, next action, and due date

The lawyer decides when more information is appropriate and how it should be provided.

Make the first response do four things

Confirm receipt

Let the person know the inquiry arrived.

Set an expectation

Say who will respond and when.

Give one next step

Ask a screening question or explain the review.

Provide a human route

Use the firm's instructions for urgent requests.

An automated receipt is not a meaningful response by itself. Identify an AI assistant plainly, and route legal questions or reported deadlines to a person. Receipt or booking must not imply the firm has agreed to handle a matter or deadline.

Illustrative inquiry · First contact

A person asks about estate planning. The inquiry is recorded, an owner is assigned, and the next action is a screening review tomorrow. A reported urgent date would trigger the firm's separate human-review route.

02 · SCREEN, BOOK, AND PREPARE

Help them get ready to talk.

Once you know your firm may be able to help, make it easy to choose a time. Tell them what to bring and what to expect, so you can both arrive ready for the conversation.

Use the firm's screening rules

Start with whether you handle this kind of matter, in this location, within the time needed. Keep the questions brief.

Use your firm's conflict and acceptance process. Staff or an assistant can collect information; legal judgments stay with the attorney.

Offer a phone alternative when a person needs help with the intake form.

Then make booking easy

Once screening permits it, offer real available times or the correct scheduling link. Label a preliminary intake call clearly if it comes before full review.

Confirm the date, time zone, duration, location or video link, any consultation fee, and how to reschedule.

Explain what to prepare, how to send it securely, and when it is needed. Give them someone to ask if they get stuck.

The lawyer's one-page preparation brief

Who	Contact details, inquiry source, and relevant names.
What	Broad request and the person's description, in their words.
When	Dates the person reported; flag any awaiting human review.
Review	Firm-recorded screening status and outstanding approvals.
Preparation	Requested items, what arrived, and what remains missing.
Open questions	What needs the lawyer's attention during the meeting.

Remind only for steps still due. Cancel obsolete reminders after a reschedule or cancellation. For last-minute bookings, use a shorter sequence. If preparation is incomplete, a person decides whether to help, proceed, or reschedule.

Illustrative inquiry · Ready to meet

After the firm's review, the prospect books. The owner sends preparation instructions, checks completion, and gives the lawyer a brief before the appointment.

03 · FOLLOW THROUGH

Keep the conversation going.

Someone who hasn't replied may be busy, unsure, or still thinking it over. A thoughtful follow-up gives them a way back into the conversation, without making them feel chased.

SITUATION	POSSIBLE STARTING CADENCE	PURPOSE
Eligible, not booked	Check in after two business days; a final note the next week.	Offer help or close the loop.
Booked	Confirm now; remind before the preparation due date and before the meeting.	Arrive prepared.
Consulted, deciding	Send the approved next step; agree on a date to check back.	Reach a clear decision.
New or existing client	Welcome; explain next steps; record promised updates.	Keep the client informed.

These are examples. Adapt timing to the practice, urgency, appointment, and person's preferences.

Pause when someone responds

When someone replies, read what they need before sending another reminder. Pause or stop nudges after a reply, booking, decline, opt-out, or attorney intervention. Share the history so nobody repeats the follow-up.

Keep the promise visible

If you promise to call or send an update, put a name and date against it. Flag missed promises. Keep service messages separate from marketing; the lawyer handles advice and approves closing or referral wording.

Booked is an active stage, not a final outcome

Active: received → screening → ready to book → booked → consulted → decision pending.
Inquiry outcomes: engaged, firm declined, prospect declined, referred, or closed with a recorded reason.

Client communication continues after engagement. Each active stage needs an owner, next action, and date.

Illustrative inquiry · After the consultation
The prospect needs time to decide. The owner records an agreed follow-up date. A reply pauses the nudges; the next decision is reviewed and recorded.

04 · TOOLS YOU CAN USE

Write like you're talking to someone.

You don't need to write every message from scratch. Start with these examples, then make them sound like you. A person reading one should understand what happens next and feel comfortable asking for help.

A · ON RECEIPT

Acknowledge the inquiry

Hi [Name], thanks for contacting [Firm]; [Person] will respond by [time]. Please hold documents and detailed information until then. For urgent requests, use [contact route]. This receipt does not mean we have agreed to handle your matter or deadline.

B · AFTER SCREENING PERMITS BOOKING

Offer a consultation

Hi [Name], the next step is a [consultation type] with [Lawyer]. Choose a time at [link], or contact [person] for help. The meeting lasts [duration]; the fee is [amount or no charge]. Booking a consultation does not mean the firm has agreed to represent you.

C · ONCE BOOKED

Confirm and prepare

Hi [Name], your consultation is [date, time, time zone] at [location / meeting link]. Please complete [short preparation step] through [secure channel] by [date]. If you need help or more time, contact [person]. To change the appointment, use [reschedule route].

D · ELIGIBLE PROSPECT HAS NOT BOOKED

Offer help taking the next step

Hi [Name], would you still like to arrange a consultation with [Firm]? You can choose a time at [booking link], or reply if you need help scheduling. If your plans have changed or you would prefer no more follow-up, please let us know.

E · FINAL ROUTINE FOLLOW-UP

Close the loop politely

Hi [Name], we haven't heard back, so we'll stop these scheduling reminders. If you'd like to reconnect, contact [person / route]. Any new request will go through the firm's review. We wish you well.

F · AFTER THE CONSULTATION

Confirm the agreed next action

Hi [Name], thank you for meeting with [Lawyer]. The agreed next step is [attorney-approved step]. [Person] will [action] by [date]. If you have a question before then, contact [route].

Missed-call callback or voicemail

“Hi [Name], this is [Person] from [Firm], returning your call. Please reach me at [number] during [hours].” Keep voicemail neutral; confirm who is listening before discussing a matter.

Before using these: replace the brackets and review the wording yourself or with the responsible lawyer. Identify AI senders plainly. Test booking changes and replies so reminders stop and questions reach a person.

04 · TOOLS YOU CAN USE

Start with one thing you can improve.

Pick one row to start. Watch what happens over the next few weeks, then choose a small improvement you'd like to make. Here's what that might look like for an imaginary firm.

What we're looking at	Where are we now?	What would be better?
Time to a useful response	8 business hours	4 business hours
Eligible inquiries that book	6 out of 10	7 out of 10
Scheduled consultations attended	8 out of 10	9 out of 10
People arriving prepared	5 out of 10	8 out of 10
Consultations becoming engagements	4 out of 10	5 out of 10
Overdue follow-ups	5	0
Weekly time spent following up	2 hours	1 hour

These numbers are examples, not benchmarks or promised results. Use your own numbers below; “not tracked yet” is a useful starting answer. Compare the same groups and time periods, and count automatic receipts separately from useful responses.

Your first improvement

1. My measure and where we are now:

2. What would be better for us?

3. What will we change, and who will do it?

4. When will we check how it went?

We can build this for you.

We can build this intake and follow-up process for you with our AI-assisted system.

Setup from $750 · one time

We set up inquiry tracking, messages, supported scheduling, and reminders for one agreed workflow, then test it with you.

Support from $250/month

We run and check it, review results, and make limited adjustments. Legal questions and client decisions stay with your firm.

Scope is agreed before work begins. Any required third-party software or usage fees are quoted separately.

Learn more: book a 30-minute call with Sage → Or email Jax

Querystead is SageRock's intake and follow-up service for small law firms. Jax is our human and AI partnership at SageRock.
sagerock.com · jax@sagerock.com

Practice-operations guidance, not legal advice. Review procedures with the responsible lawyer. Examples are illustrative.