



# From Inquiry to Client: Fixing Intake Gaps in Small Law Firms

**CLERX.**

**AI Intake for Law Firms**

Speaker: Michael Brunman

 [www.clerx.ai](http://www.clerx.ai)



Talk to CLERX

# Meet Your Host



## Michael Brunman

**Co-Founder & CEO, CLERX**

- Commercial Litigation and Intellectual Property Attorney
- Former software engineer, product manager, and management consultant
- Harvard MBA



**Harvard  
Business  
School**



**McKinsey  
& Company**

# Agenda

- Why Intake Matters More Than Ever
- Common Intake Pitfalls
- The Building Blocks of a Strong Intake Workflow
- Practical Ways to Improve Your Intake
- How CLERX Helps Law Firms

# Let's get to know each other

- What best describes your role?
- Which practice area best describes your firm?

# Why Intake Is So Important

- Intake is your first impression with clients
- It directly impacts conversion and revenue
- Most clients hire the first responsive firm
- Missed or delayed responses mean lost cases
- Strong intake maximizes ROI on marketing spend
- Small improvements can drive significant growth

# Why Good Leads Still Fail to Become Clients?

- 1 in 3 calls to law firms is never answered live
- Most clients hire the first lawyer they reach - is that your firm?
- Fast response leads to dramatically higher conversion
- After-hours inquiries often become missed opportunities
- Intake is often inconsistent, manual, and unstructured
- Clients increasingly expect instant, 24/7 responses - including through AI

# Let's get to know each other

- How does your firm handle most new client intake today?
- Where do most of your new inquiries come from?

# What Makes Intake Different for Solos/Small Firms

- Intake is often handled by the attorney
- Every missed call has immediate revenue impact
- Limited staff means less process consistency
- First impression often determines hiring decision
- Balancing legal work with intake is challenging
- Strong intake can be a key growth lever

# What Intake Often Looks Like

- Calls go unanswered or to voicemail
- Delayed or inconsistent follow-up
- No standardized intake process
- Key details often missed
- Intake handled by busy staff
- No clear tracking or accountability

# Let's get to know each other

- What is the biggest intake challenge at your firm today?
- Does your firm currently use a case management or intake system?

# Key Building Blocks of a High-Converting Intake

- Immediate response across all channels
- Consistent, structured intake process
- Clear lead qualification criteria
- Practice and case-specific questions and workflows
- Fast scheduling and seamless handoff
- Ongoing follow-up and tracking

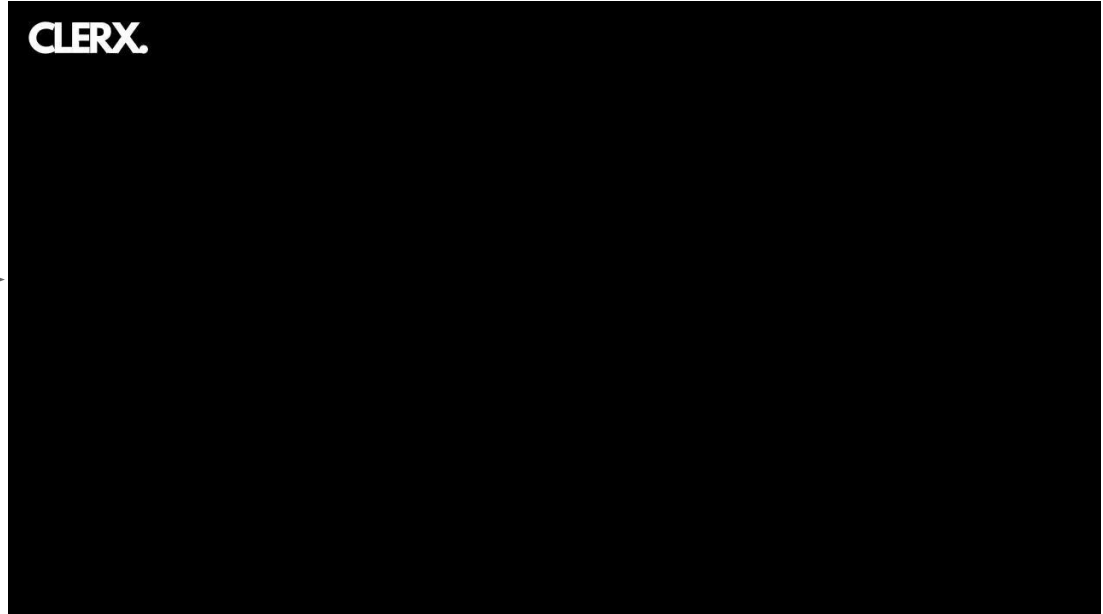
# Workflow Example - New Prospective Client

- Instant response to new inquiry
- Warm, empathetic first interaction
- Capture contact and case details
- Ask practice/case-specific qualifying questions
- Confirm fit and urgency level
- Schedule consultation and confirm next steps

# Best Practices to Start Using Today

- Prioritize cases based on value and urgency
- Score and track leads in your CRM
- Keep first calls brief and outcome-focused
- Book consultations quickly for qualified leads
- Treat intake as a true sales function
- Improve continuously by reviewing calls and numbers

# #1 Call Analysis



Real-time CRM sync



Legalboards



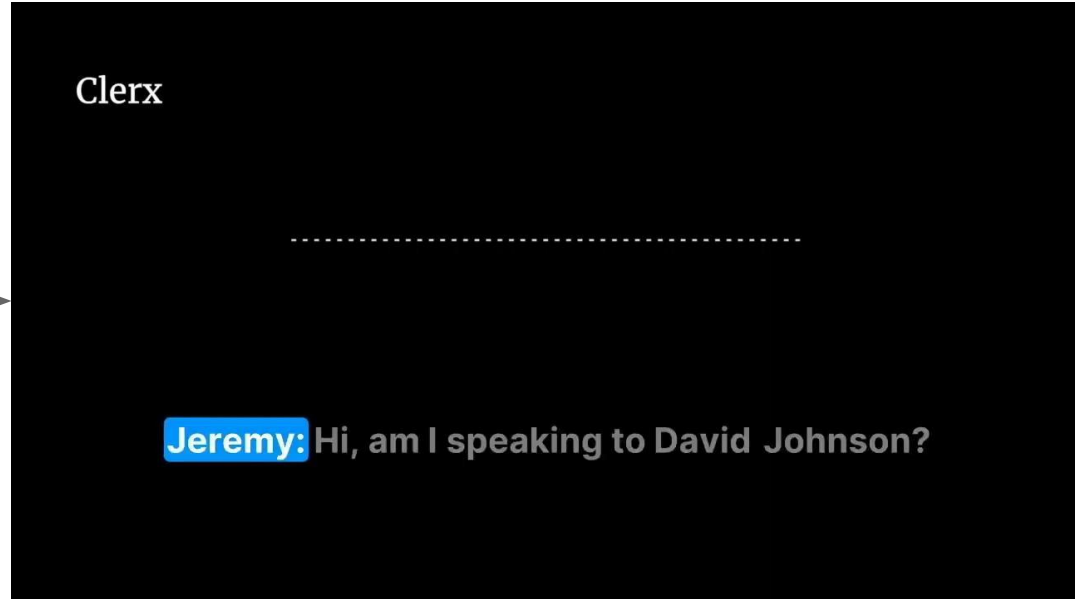
*(Illustrative, not exhaustive - we support all CRMs.)*

# What Made This a Strong Intake Call?

- The caller felt heard from the start
- The right facts were gathered to qualify the matter
- The firm captured useful marketing attribution
- The conversation adapted to the caller's specific situation
- The caller was reassured and guided with confidence
- The next steps were clear and easy to understand
- The call ended on a helpful, professional note



## #2 Call Analysis



Real-time CRM sync



Legalboards



Lawmatics

*(Illustrative, not exhaustive - we support all CRMs.)*

# What Made This a Strong Intake Call?

- Fast follow-up within five minutes using AI
- A clear, empathetic introduction
- Permission-based opening: "Is this a good time?"
- Clear expectations for the conversation
- Thoughtful, case-specific qualifying questions
- Smooth transition to consultation booking
- A reassuring experience that made the caller feel heard



# How CLERX Helps Law Firms



Talk to CLERX

# CLERX AI Receptionist

- Answer common questions about your practice
- Qualify new leads and triage inbound calls
- Take messages or book consultations
- Route callers to the right person
- Support callers in 40+ languages
- Sync details with your CRM and calendar



# CLERX Website Chat

- Answer common questions about your practice
- Qualify new website leads in real time
- Capture contact details and book consultations
- Support website visitors in 40+ languages
- Sync details with your CRM and calendar
- Handle unlimited chats and lead conversations

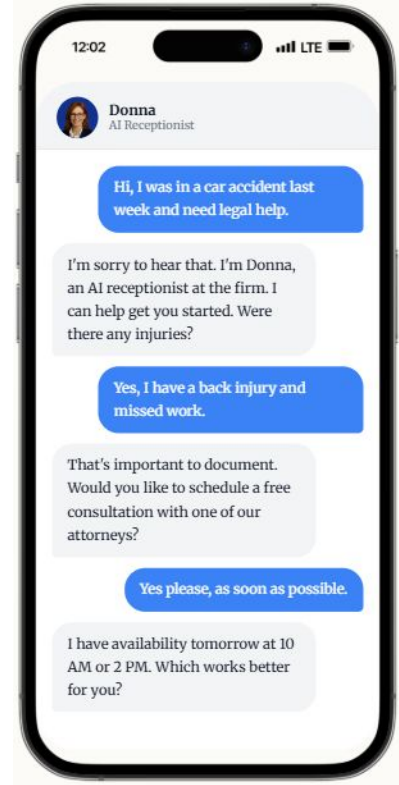
The screenshot shows a chat window titled "Donna from the Law Office of Lawrence & Bradford Law" with a close button (X). The chat history includes:

- Donna** (10:16 AM): Hello! Welcome to the Law Office of Lawrence & Bradford Law. How can I help you today?
- Jack Black** (10:16 AM): Hi Donna, I need help with my H1B visa application.
- Donna** (10:16 AM): Thanks - I can help with that. Can I please have your full name?
- Jack Black** (10:17 AM): Jack Black
- Donna** (10:17 AM): Thanks, Jack. What's the best phone number to reach you at?

At the bottom, there is a text input field with the placeholder text "Type your message..."

# CLERX Text Messaging

- Answer common questions by text message
- Respond instantly to inbound text inquiries
- Qualify leads and capture key intake details
- Book consultations or route conversations to your team
- Support clients in 40+ languages by text
- Sync details with your CRM and calendar



# Clients Save Time, Cut Overhead & Scale

## Goodbye, Overhead

*“A full-time receptionist I can trust, without the cost or headache.”*

★★★★★

**Denise McGettrick**

Founding Attorney

McGettrick Law



## Effortless Scalability

*“As we grow, I know CLERX scales with us, without more hiring or training.”*

★★★★★

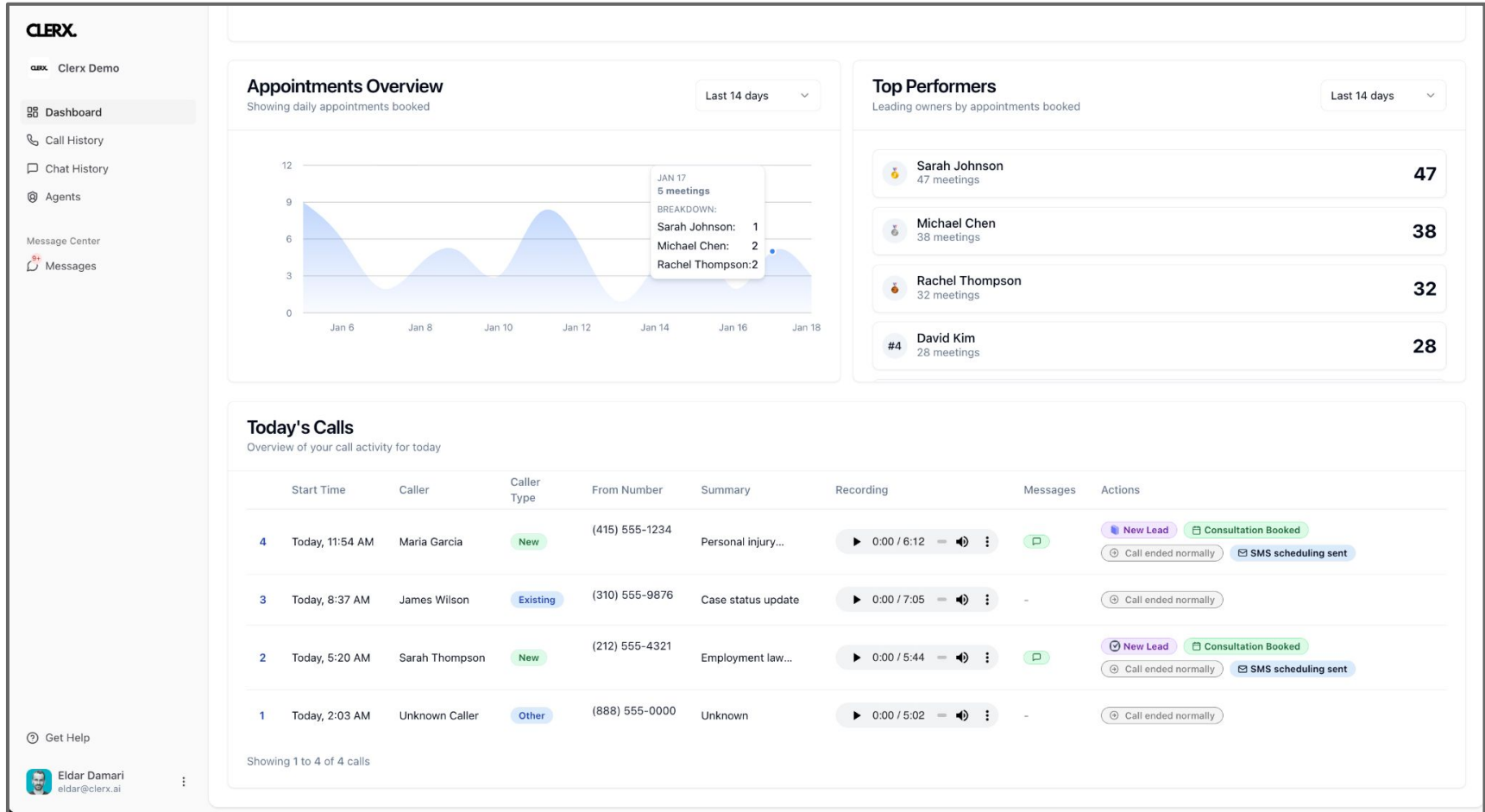
**Aleksandra Gontaryuk**

Managing Attorney

AG Law



# CLERX Dashboard - Real-Time Visibility into Intake Performance



# Supported Integrations

 **8am**™ MyCase

 Legalboards

 **Clio**

 Lawmatics

 **SMOKEBALL**®

 **FILEVINE**

 **Lawcus**

**LEADDOCKET**

 **PRACTICEPANTHER**®

*(Illustrative, not exhaustive - we support all CRMs.)*

# Next Steps

- We can launch your tailored Clerx line in 24-48 hours
- Setup takes about 45 minutes from your team
- Full support during onboarding and after launch
- **Exclusive webinar perk:**

**50% off your first month**



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# Thank you



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## Contact Us

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