

Score the handoffs that quietly cost leads and staff time.

Use this with one generic workflow: new lead to retained matter, consultation follow-up, document collection, payment handoff, or weekly stuck-leads visibility.

Do not share confidential client details in an initial workflow diagnostic. Use generic examples, redacted screenshots, or a narrated walkthrough.

LEAD INTAKE

Score

- Does every new lead have one clear owner within the first hour?
- Is the lead source captured automatically?
- Does the team know which leads are waiting on staff vs waiting on the prospect?
- Are duplicate leads merged or flagged?
- Can a partner see today's uncontacted leads without asking staff?

FOLLOW-UP

Score

- Is there a default follow-up sequence for no response, no-show, and "thinking about it" prospects?
- Are reminders created automatically, or does someone need to remember?
- Is follow-up personalized from intake notes without retyping?
- Can the team see overdue follow-ups in one place?
- Is there a rule for when a stale lead gets escalated?

CONSULTATION TO MATTER

Score

- Is the handoff from consultation to retained matter documented?
- Which fields get copied manually between intake, CRM, practice management, documents, and billing?
- Are signed agreements, payment status, and missing documents visible together?
- Does matter creation trigger the right folders, tasks, and owner assignments?
- Is there a rollback path if a matter is created incorrectly?

DOCUMENTS AND MESSAGES

Score

- Do emails, texts, forms, and uploads land in the right matter consistently?
- Are missing documents tracked by matter and owner?
- Does staff know which documents are still needed before the next step?
- Are file naming and folder rules written down?
- Can the firm audit where a client message was saved?

WEEKLY VISIBILITYScore

- Which leads are new, stale, or unassigned?
- Which consultations no-showed or need follow-up?
- Which prospective matters are waiting on documents or payment?
- Which staff-owned tasks are overdue?
- Which workflow step creates the most delay?

FIRST FIXPriority

- Which section scored lowest?
- Which handoff creates the most delay or missed revenue?
- Can the fix use tools already in place?
- Can success be seen within 14 days?
- Who owns the workflow after the fix?

SCORING

- | | |
|----------|--|
| 0 | Not tracked. |
| 1 | Mostly manual and inconsistent. |
| 3 | Tracked, but manual checking required. |
| 5 | Visible, owned, and mostly automated. |

NEXT STEP

1. Pick the lowest-scoring section.
2. Name the one handoff causing the most delay or missed revenue.
3. Fix one handoff before buying or building more software.