REIGNBRIDGE
CONSULTING

CONCEPT ENGAGEMENT · FICTIONAL CLIENT

BUSINESS DIAGNOSTIC · EXECUTIVE READOUT

# Westbrook Legal: from inquiry to signed client

Findings and recommendations for the partners

Prepared by ReignBridge Consulting · Three-week intake diagnostic

THE ANSWER FIRST

# We recommend a 14-week intake overhaul, starting with how the firm answers new inquiries

**36**

prospects a month never speak to anyone at the firm

**103**

staff hours a month spent moving intake by hand

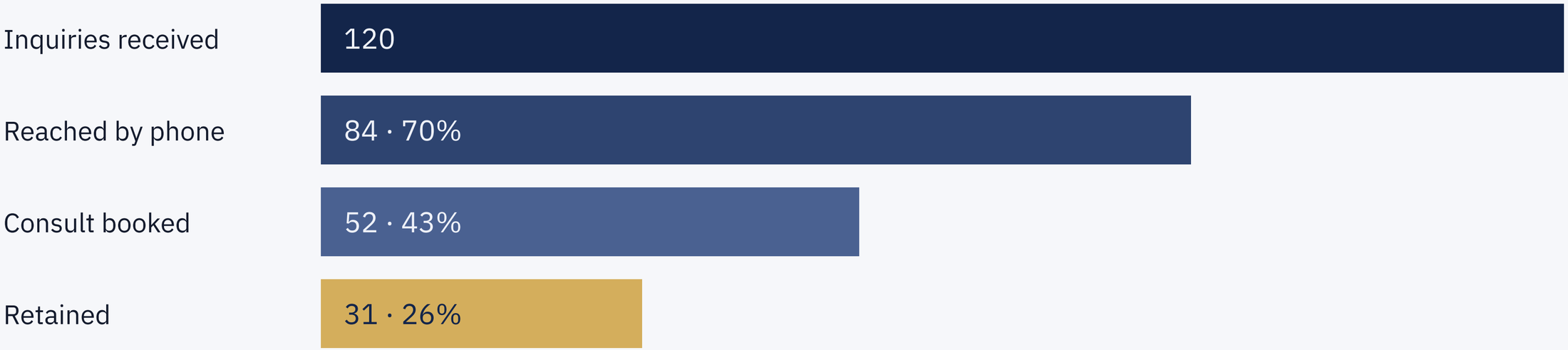
**6.5**

days from consult to a signed engagement letter

DECISION TODAY Approve Phase 1: four weeks to stop losing prospects before an attorney ever hears from them.

FINDING 1 · WHERE PROSPECTS GO

# One in four inquiries becomes a client




The biggest drop happens before an attorney is involved. Six of eight unreached prospects we called had hired another firm within 48 hours.

Monthly averages from 40 traced inquiries, scaled to reported volume. Illustrative figures, fictional firm.

FINDING 2 · CURRENT WORKFLOW

# Eight steps, four systems, three re-typings

01

**Inquiry arrives**

Phone, web, email

41% after hours

02

**Logged in spreadsheet**

Coordinator · 6 min

03 · Bottleneck

**First callback**

26 hours average wait

30% never reached

04 · Bottleneck

**Conflict check**

Paralegal · 35 min

2.1 day delay

05

**Consult scheduled**

4.2 emails average

06

**Consultation**

Attorney · 45–60 min

07 · Bottleneck

**Engagement letter**

45 min to draft

6.5 days to signed

08 · Bottleneck

**Matter opened**

22 min each

Typed a third time

FINDING 3 · THE ROOT CAUSE

# Every bottleneck traces to one gap: intake lives in inboxes and a spreadsheet, not in one shared record.

Fix the record and the handoffs follow. That is why we don’t recommend replacing the practice management system.

FINDING 4 · WHAT IT COSTS

# Five bottlenecks, ranked by severity

| Bottleneck | Evidence | Cost to the firm | Severity |
|---|---|---|---|
| Slow first response | 26 hrs average | About 36 prospects a month never reached | High |
| Manual conflict checks | 35 min · 2.1 days | 30 paralegal hours a month; consults pushed out | High |
| Slow engagement letters | 6.5 days to sign | Signed clients reconsider; 23 staff hours a month | High |
| Triple data entry | 22 min per matter | Errors in client records; 11 hours a month | Medium |
| No pipeline visibility | No reports today | Partners can’t see conversion or follow-up gaps | Medium |

RECOMMENDATIONS

# Six changes, sequenced by impact and effort

R1 · Quick win · Phase 1

### Instant acknowledgment and structured intake

Every inquiry confirmed in minutes, day or night

R2 · Quick win · Phase 1

### Self-scheduling after screening

Real attorney availability, automatic reminders

R6 · Phase 1

### Intake pipeline dashboard

A weekly view of response times and conversion

R3 · Phase 2

### Conflict-check prep packet

Automated search; the attorney still decides

R5 · Phase 2

### Engagement letters with e-signature

Approved templates, attorney review, reminders

R4 · Phase 3

### One intake record into the practice system

Client details entered once, never retyped

ROADMAP

# Fourteen weeks, three phases, a check at each gate

PHASE 1 · WEEKS 1–4

## Stop the leak

- Structured intake and acknowledgment
- Self-scheduling
- Pipeline dashboard
- Three SOPs and training

Gate: first response under 4 business hours

PHASE 2 · WEEKS 5–9

## Speed up the middle

- Conflict-check prep packet
- Engagement letters with e-signature
- Two SOPs

Gate: letters signed within 3 days

PHASE 3 · WEEKS 10–14

## Connect the record

- Intake record into the practice system
- Final SOP, handoff, documentation
- 30-day results review

Gate: zero manual re-entry on new matters

PROJECTED IMPACT

# About 60 staff hours a month back, and 4 to 6 more clients

| Measure | Today | Projected |
|---|---|---|
| Time to first acknowledgment | 26 hours | Under 5 minutes |
| Time to human callback | 26 hours | Under 4 business hours |
| Prospects reached | 70% | 85–90% |
| Conflict check effort | 35 minutes | About 10 minutes |
| Letter to signature | 6.5 days | About 2 days |
| Staff hours on intake | 103 per month | About 43 per month |
| Retained matters | 31 per month | 35–37 per month |

Projections, not measured results. Westbrook Legal is fictional and baselines are illustrative.

SAFEGUARDS

# Built for a profession with confidentiality duties

### Data stays in the firm’s systems

No prospect or client information goes into public AI tools.

### Attorneys make the legal calls

Conflicts, advice and every engagement letter stay with an attorney.

### Mapped to professional rules

ABA Model Rules 1.1, 1.6 and 5.3, and Formal Opinion 512 on generative AI.

### Every action leaves a trail

Each inquiry shows who handled it, when, and what was sent.

THE DECISION

# Approve Phase 1 today

Four weeks to stop losing prospects at the front door, with a measurable gate before anything else is committed.

SCOPE

Structured intake, self-scheduling, dashboard, three SOPs

TIMELINE

Weeks 1–4

INVESTMENT

Fixed fee, agreed before work begins

FROM THE FIRM

One partner sponsor and two hours a week from the intake coordinator