

# Is Your Intake Ready for an AI Phone Assistant?

A practical planning guide for lawyers and law firm teams.

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Use this guide to choose one call path worth testing, write its boundaries, and name the person responsible for follow-up. Start with generic scenarios; keep client names and matter details out of your planning notes.

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**Your outcome: one proposed call path, a handoff owner, a short test list, and questions to resolve before launch.**

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# 1. Map incoming calls

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Review the current process before choosing a tool. Use your own observations; do not assume an assistant will improve every call.

Complete this table: Call type | Current destination | What the caller needs | Proposed owner.

Include: new inquiry; existing client; after-hours request; wrong number; caller asking for legal advice; urgent issue.

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Write down where calls are missed, delayed, repeated, or hard to follow up. Separate what you have observed from what you want to test.

First call path to investigate: \_\_\_\_\_

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Why this path: \_\_\_\_\_

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Current staff owner: \_\_\_\_\_

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Current phone system or answering service: \_\_\_\_\_

## 2. Define answers and minimum intake

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Create an approved-answer list for office hours, locations, service descriptions, appointment instructions, and callback expectations. Name the person who updates it.

**Set boundaries: no case evaluation, no legal advice, no promise of representation, and no invented response-time commitment.** Define the fallback when an answer is not approved.

Use only the fields needed for the first action: preferred name, callback number, request category, and a short non-sensitive description. Decide whether any additional field is necessary before adding it.

Approved greeting and role disclosure: \_\_\_\_\_

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Contact fields to collect: \_\_\_\_\_

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Information not to request: \_\_\_\_\_

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Approved response when unsure: \_\_\_\_\_

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Answer-list owner and review date: \_\_\_\_\_

### 3. Route callers and plan handoffs

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For each call path, write Trigger | Destination | Availability | Failed-transfer fallback | Follow-up owner.

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- **New inquiry:** collect agreed contact fields, confirm them, then follow the approved next step.
- **Existing client:** use the firm's designated staff path; do not discuss confidential matter details in a generic intake flow.
- **After-hours caller:** use the firm's approved instructions and realistic follow-up wording.
- **Legal-advice request:** explain the assistant's limits and route to a person.
- **Urgent issue:** use a firm-approved escalation path. Do not improvise an emergency response.
- **Failed handoff:** explain the fallback, preserve the request, and notify the named person.

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**Every path needs a person responsible for the next action.**

## 4. Ask vendors and test realistic calls

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### Vendor questions to resolve:

- What call data, recordings and transcripts are stored, where, for how long, and who can access or delete them?
- Which subprocessors and AI services receive data? Is it used for model training?
- How do recording, disclosure and consent settings work for the firm's intended use?
- Which integrations are supported? What happens if the phone, calendar or CRM connection fails?
- What are the setup, usage, number, integration and ongoing support costs? How can the firm pause or roll back?

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Test with synthetic details: new inquiry; existing client; after-hours; interrupted caller; corrected callback number; legal-advice request; urgent issue; caller requesting a person; unavailable transfer destination; failed notification.

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Record expected action, actual action, pass or fail, issue owner, and retest result. Verify callback details and the recipient of each notification.

## 5. Choose a small pilot and next step

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First call path: \_\_\_\_\_

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Pilot owner and reviewer: \_\_\_\_\_

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Approved hours and transfer destination: \_\_\_\_\_

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Start date and review date: \_\_\_\_\_

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Open questions before launch: \_\_\_\_\_

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Rollback process and owner: \_\_\_\_\_

Review the whole experience: correct contact details, successful and failed handoffs, missing or duplicate requests, and whether staff can act on the summary. Use your baseline and actual test observations; no promised savings or invented readiness score.

Use the companion one-page launch checklist. Resolve failed test cases before routing real calls through the pilot, then keep a person reviewing the results.

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Want help mapping a call path and scoping a first pilot? Discuss your intake workflow with Chris Costa:  
<https://www.legalsearchmarketing.com/contact?service=voice-assistant>

Read the companion article and video: <https://www.legalsearchmarketing.com/blog/ai-phone-assistant-law-firm-intake>

Provider subscriptions, usage charges and implementation are scoped for the chosen setup.