

CASE STUDY 02 • LEGAL SERVICES

Personal-Injury Law Firm — 24/7 Intake & Case-Evaluation System

An after-hours intake engine that captures injured claimants before rival firms respond.

INDUSTRY	LOCATION	TIMELINE	INVESTMENT
Legal Services	Metro Area	90 Days	\$4,500 setup + \$1,200/mo

The Problem

A four-attorney personal-injury firm was losing 40% of its after-hours leads. Their intake team worked 8am–6pm, so a web inquiry submitted at 8:15pm went unanswered until 9am the next day — by which time the injured party had already contacted two or three other firms. They needed 24/7 qualification, automatic consultation scheduling, case-type segmentation, and compliance with attorney-advertising rules.

FUNNEL BUILDER Intake Landing Page

Landing Page — Personal-Injury Intake

Hero: “Injured? You may be entitled to compensation,” with a case-type selector (5 options).

Trust bar: \$42M recovered | 4.9 Google rating | AV Preeminent | Super Lawyers.

Attorney bios: Video introductions with credentials, case history, and bar admissions.

Conditional content: Auto-accident visitors see crash stats; slip-and-fall visitors see premises-liability info.

CTA: “Free case evaluation — no fee unless we win” (contingency-fee messaging).

Dual capture: Live-chat widget (conversational) + form (structured intake).

Exit-intent: “Don’t wait — the statute of limitations may limit your rights,” plus phone number.

Compliance: Attorney-advertising disclaimer footer on every page.

Result: 28.6% conversion rate | 52% mobile traffic.

Figure 2.1 — Professional intake funnel with case-type conditional logic.

My Approach to the Funnel

Legal funnels demand a different psychology than home services. The visitor is in pain, stressed, and wary of lawyers. The hero doesn’t sell legal services — it sells validation (“you may be entitled”). The trust bar leans on third-party credentials rather than self-claims. The conditional content is the secret weapon: an auto-accident visitor sees “Car-crash injuries rose 23% in [City] last year,” while a workers’-comp visitor sees “You have rights even if your employer says you don’t.” That relevance lifts form completion by 34%.

FORMS Case Intake**Detailed Case-Intake Form**

Section 1 — Incident: Date, time, location, type, police-report number.

Section 2 — Injury: Severity scale (1–10), hospitalization, ongoing treatment, permanent disability.

Section 3 — Insurance: Carrier, policy number, claim status, adjuster contact, other-party info.

Section 4 — Legal history: Prior attorney contact (critical for conflict checks), statute concerns.

Section 5 — Contact: Name, phone, email, preferred call time, language (English / Spanish).

Logic: Workers' comp skips "other party"; med-mal adds a treatment timeline; wrongful death adds decedent relationship.

File uploads: Police reports, medical records, insurance cards, photos of injuries/scene.

Digital signature: Retainer-agreement e-signature field (integrated with GHL Docs).

Required: Incident date, injury severity, prior attorney contact, phone number.

Result: 64.2% completion rate | 100% conflict-check compliance.

Figure 2.2 — Conditional intake form with legal-compliance fields and document upload.

My Approach to the Form

This form gives the intake attorney everything needed for the first call, eliminating the "let me call you back after I review this" delay. The prior-attorney-contact field triggers a conflict-check workflow — if the lead already spoke to a competitor, the firm may have an ethical conflict. The conditional logic keeps workers'-comp leads from seeing irrelevant "other party" questions. File uploads let the lead attach police reports and medical records before the first call, making the consultation three times more productive.

WORKFLOWS Automation · Part 1: Immediate Response**Automation Workflow — 24/7 Intake (Part 1: Immediate Response)**

Trigger: Form submitted OR live-chat transcript saved.

Action 1: Create an opportunity and auto-tag by case type (AUTO / SF / WC / MM / WD).

Action 2 — Hours check: If after 6pm or weekend → auto-SMS: "[FirstName], we received your inquiry. A team member will call you first thing at 8:15 AM." If during hours (8am–6pm, Mon–Fri) → ring the intake team via GHL phone and create a HIGH-PRIORITY opp.

Action 3: Wait 30 minutes — if no call is logged, escalate to the managing partner via email + Slack + SMS.

Result: 41% after-hours conversion (was 12%) | 0 leads lost to delay.

Figure 2.3a — Immediate-response logic with after-hours SMS and escalation.

WORKFLOWS Automation · Part 2: Nurture Sequence**Automation Workflow — 24/7 Intake (Part 2: Nurture Sequence)**

Action 4 (Day 1): Send a case-specific legal guide, auto-selected by case-type tag — e.g. AUTO: “What to do after a car accident”; WC: “Understanding your workers’ compensation rights in [State]”; MM: “Medical malpractice: what victims need to know.”

Action 5 (Day 3): Send an attorney-introduction video (case-type specific) + Calendly booking link.

Action 6 (Day 7): Send a statute-of-limitations reminder if the incident date is more than 12 months ago.

Action 7 (Day 14): “Still deciding?” re-engagement email with FAQ + recent settlement results.

Action 8 (Day 30): If no consultation is booked, move to the quarterly newsletter + retargeting audience.

Result: 14-day nurture drives 23% of all consultations booked.

Figure 2.3b — 30-day nurture sequence with case-type segmentation.

My Approach to the Workflow

This is the most complex workflow in my portfolio, because legal intake carries the highest stakes and the most compliance requirements. The business-hours check is the critical innovation: after-hours leads get an immediate SMS that sets proper expectations (a callback at 8:15 AM) and builds trust by giving a real phone number. The 30-minute escalation stops any lead from sitting untouched during business hours. Case-type segmentation drives the 41% after-hours conversion — an auto-accident victim needs different messaging than a workers'-comp claimant, because their fears, objections, and decision timelines differ completely.

PIPELINE Case Management**Case Pipeline — Personal-Injury Division**

Stage 1 — Intake Submitted: Form or chat captured | 89 leads | \$11.3M potential value.

Stage 2 — Consultation Scheduled: Calendar confirmed + intake packet sent | 52 leads | \$6.6M.

Stage 3 — Consultation Completed: Attorney meeting done + case notes entered | 41 leads | \$5.2M.

Stage 4 — Case Accepted: Conflict check passed + merit assessment positive | 28 cases | \$3.6M.

Stage 5 — Retainer Sent: GHL Docs auto-generates the retainer (populated from intake-form data) | 28 cases.

Stage 6 — Retainer Signed: E-signature received + initial deposit collected | 23 cases | \$2.9M active.

Stage 7 — Case Active: Discovery initiated + paralegal assigned + medical records requested | 19 cases.

Stage 8 — Settlement / Verdict: Case resolved + fee collected + review request triggered | 4 resolved.

Document automation: Retainer, medical-authorization, and lien documents auto-generated at Stage 5.

Reporting: Custom dashboard shows case value by attorney, conversion by case type, and resolution timeline.

Result: \$2.9M active case value | 23 new cases in Q1 | \$127K avg case value.

Figure 2.4 — Eight-stage legal pipeline with document automation and case-value tracking.

My Approach to the Pipeline

Legal pipelines are different because the product is a multi-year relationship, not a one-time transaction. The eight stages mirror the firm's actual case lifecycle. The document automation at Stage 5 is a major time-saver: GHJ's document builder pulls data straight from the intake form and auto-populates the retainer agreement, medical authorization, and lien documents, eliminating the two-to-three-day delay of manual preparation. The reporting dashboard shows the managing partner not just pipeline value, but attorney utilization rates and case-type profitability.



This case study represents an actual project outcome. The client's name, location, and identifying details have been anonymized to protect confidentiality and attorney-client privilege. Results vary with market conditions, case mix, and intake-process maturity. Nothing here is legal advice, and I don't guarantee specific results — I guarantee systems built to best practices with measurable optimization potential.