ALFREDI

ACTLA LUNCH & LEARN · NOVEMBER 20, 2026 · TERESA WONG

Your Growth Scorecard and Toolkit

You're already paying for marketing. Here's how to make sure it pays you back.

Thank you for the hour. This is the whole session in a few pages, plus the six tools I promised. Each one helps you catch more of the clients your marketing already brings in.

THE NUMBERS WORTH REMEMBERING

40%
of law firms answered the phone when a new client called

33%
of firms replied to an email inquiry at all

48%
didn't answer the phone or call back. Unreachable by phone.

21×
more likely to qualify a lead at 5 minutes than at 30

Clio Legal Trends Report 2024, secret-shopper study of 500 US firms (phone answer rate was 56% in 2019; it went the wrong way). 79% of clients expect a response within 24 hours (Clio, 2019). Lead Response Management study, Dr. James Oldroyd, MIT Sloan, with InsideSales.com, 2007.

TOOL 1 · FIND YOUR BIGGEST WIN

Your Growth Scorecard

Score your firm against the benchmark, not your gut. Every "not yet" is a retained client waiting to happen. Start with the one that costs you most.

Speed
Is the phone answered in 5 rings, chat in a minute, and email the same day?

☐ Yes ☐ Not yet

Coverage
Are more than 90% of inquiries answered by a person?

☐ Yes ☐ Not yet

Booking
Do you book the consult on the first contact, not a callback?

☐ Yes ☐ Not yet

Clarity
Can you name the true source of every client you retained last month?

☐ Yes ☐ Not yet

ALFREDI

TOOL 2 · WHO ANSWERS, HOW FAST, EVERY CHANNEL

The Response Standard

Fill this in and post it where your team can see it. Applies to every door: phone, email, website form, live chat, referral.

Phone answered within _____ rings (aim: 5)

Chat answered within _____ (aim: 1 minute)

Email and web form replied to _____ (aim: same day; next morning if after hours)

Who owns the phone, hour by hour: _____

After-hours plan (not voicemail): _____

TOOL 3 · ANSWER AND BOOK THE CONSULT ON THE SPOT

The First-Contact Playbook

Four steps. Every inquiry, every channel, every time. Miss one and the client leaks.

1

Answer on time

Phone in 5 rings. Chat in a minute. Email and web forms the same day.

2

Book the consult now

On the first contact. The goal is a booked appointment, not a message.

3

Run one intake, every time

The same questions and the same answers, whoever picks up.

4

Track every source

Log where each retained client came from, so you know which marketing pays.

The line that books the consult: "I can get you in with [lawyer] on [day] at [time], or [day] at [time]. Which works better?" Two real options, offered before they hang up. Never "someone will call you back."

TOOL 4 · CLEAR THE CONFLICT, THEN BOOK

The Intake Script

What it's for: confirming the firm can act before anyone hears the story or books a consult. Same order every time. The full story is for the lawyer at the consult.

1. **"Can I get your full name, and the best number and email to reach you?"** Write it down before anything else.
2. **"Who is the other party?"** The opposing party's name: the other driver, the insurer, the employer, the spouse.
3. **Run the conflict check.** "Let me make sure we're able to help you. One moment." If there's a conflict, refer them out kindly and log it as "Referred out" (Tool 5).
4. **All clear? Book them in.** Use the line from Tool 3: two real times, before they hang up.

TOOL 5 · SEE WHICH MARKETING ACTUALLY PAYS

The New Client Inquiry Log

One line for every new client who reaches out. Tick the status and the source. Review it monthly: the "Retained" rows show which sources actually pay.

DATE	CLIENT NAME	STATUS (TICK ONE)	SOURCE (TICK ONE)	LAWYER GIVEN TO
		☐ Retained ☐ Scheduled ☐ Consult only ☐ Cancelled ☐ Referred out	☐ Phone ☐ Email ☐ Web form ☐ Chat ☐ Referral ☐ Ad ☐ Directory	
		☐ Retained ☐ Scheduled ☐ Consult only ☐ Cancelled ☐ Referred out	☐ Phone ☐ Email ☐ Web form ☐ Chat ☐ Referral ☐ Ad ☐ Directory	
		☐ Retained ☐ Scheduled ☐ Consult only ☐ Cancelled ☐ Referred out	☐ Phone ☐ Email ☐ Web form ☐ Chat ☐ Referral ☐ Ad ☐ Directory	
		☐ Retained ☐ Scheduled ☐ Consult only ☐ Cancelled ☐ Referred out	☐ Phone ☐ Email ☐ Web form ☐ Chat ☐ Referral ☐ Ad ☐ Directory	
		☐ Retained ☐ Scheduled ☐ Consult only ☐ Cancelled ☐ Referred out	☐ Phone ☐ Email ☐ Web form ☐ Chat ☐ Referral ☐ Ad ☐ Directory	

TOOL 6 · RUN THE UPSIDE ON YOUR OWN NUMBERS

The Opportunity Calculator

Inbound inquiries a month, all channels: _____

Missed or answered too slowly (use 40% if you don't know): _____

Of those, would have retained you (even 1 a month counts): _____

Your average fee per retained client: $ _____

× 12 months = your yearly upside: $ _____

One serious file a month is a six-figure swing a year. *After a month with the inquiry log (Tool 5), run this again with your real numbers.*

Questions about any of these tools?

Email me. I'm happy to help you put them to work at your firm.

Teresa Wong · hello@withalfredi.com