

## CASE STUDY · IMPACT ASSISTANT

# From Lead to Client. Faster.

A high-volume firm didn't just see more leads come through the door. They saw the right leads, pre-qualified, prepped, and ready to retain. Over the course of two months, appointment volume rose and the consults arriving on-calendar were measurably closer to signing. This is what disciplined intake looks like.

[Book an Intake Audit →](https://attorneyassistant.com/book-call)<https://attorneyassistant.com/book-call>**Up**MONTHLY  
APPOINTMENT VOLUME**2**EMBEDDED INTAKE  
SPECIALISTS**Ready**QUALITY OF CONSULTS  
AT HAND-OFF**Sustained**PERFORMANCE HELD ACROSS  
REPORTING PERIODS

## THE CLIENT

**Doing the right things at the top of the funnel. Bleeding at the middle.**

The firm runs a high-volume, intake-driven practice. Like most firms at their stage, they were doing the right things at the top of the funnel. Marketing was producing leads. The phone was ringing. The problem was downstream. Too many of those leads were dying somewhere between "called us" and "showed up for a consult."

**They didn't need more demand. They needed someone to convert the demand they were already paying for.**

## **The bottleneck wasn't marketing. It was intake.**

The firm was running into the same wall most growing practices hit:

- ✗ Inbound calls weren't being converted to appointments at the rate they should have been
- ✗ Consults that did get booked were under-qualified, eating up attorney time on cases that weren't going to retain
- ✗ Follow-up was inconsistent. The gap between "called" and "scheduled" was costing them cases
- ✗ The team was working hard. They just weren't working on the right things.

## THE SOLUTION

## Two **Impact Assistants**. Embedded directly into the intake operation.

We placed Isabella and Alex into the firm's intake workflow. Not generalists. Trained intake specialists. Accountable to outcomes. Treated as part of the team.

## WHAT CHANGED AT THE INTAKE LAYER

01

**Structured intake protocols**

Built for legal lead qualification

02

**Daily call activity reporting**

With detail attorneys could act on

03

**Persistent follow-up sequences**

That didn't quit at touch two

04

**Pre-screened consults**

Arriving on-calendar ready for the attorney

WHAT THEY'RE SAYING

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# Four months of feedback. **One** consistent story.

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"The number of appointments has really increased in the last month, so hopefully that'll continue."

Client feedback, April 2026

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"Isabella's doing a great job. So, she's very responsible, and we get really good posts from her daily on the calls that she's taking."

Client feedback, April 2026

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"I really don't see anything that I have concerns about with either Alex and Isabella. They're both doing really well."

Client feedback, May 2026

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"We're getting a lot more calls coming in... [and] they're pretty much ready to hire."

Client feedback, May 2026

**"Ready to hire" is the language of an intake operation that's actually working.**

#### THE OUTCOMES

**Three things shifted. They reinforced each other.**

**01****More appointments hitting the calendar.**

The firm reported a clear uptick in monthly appointment volume. The leads being generated were no longer leaking out the bottom of the funnel.

**02****Higher-quality consults.**

Consults arriving for attorney conversations were closer to "ready to hire." Less time wasted on unqualified prospects. More attorney time spent on cases that would actually retain.

**03****Sustained performance.**

This wasn't a one-month spike. The same satisfaction signals appeared again a month later. Reliable. Repeatable. That's the difference between a temporary lift and a real system.

**If your appointment volume is flat but your lead volume isn't, you have an intake problem.**

[See What Your Intake Is Costing You →](#)

## WHY IT MATTERS

**More volume  
and better  
quality. From  
the same  
lead flow.**

Most firms hear "we increased appointments" and assume the answer is more marketing spend. The firm didn't add a single dollar to the top of the funnel. They fixed the middle.

When intake is broken, every dollar you spend on leads is partially wasted. When intake works, every existing lead converts at a higher rate, and the attorneys spend their time on cases that actually move the firm forward.

**This is the compound effect we engineer for.**

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**"[Client quote to be sourced from firm leadership. Editable placeholder.]"**

[Name, Title], firm leadership

## WHAT THIS MEANS FOR YOUR FIRM

**If you're seeing  
flat  
appointment  
numbers, you  
already have an  
answer.**

If your appointment volume looks flat but your lead volume isn't, you have an intake problem. If your attorneys are walking out of consults saying "that one wasn't going to retain anyway," you have an intake problem. If your follow-up dies at touch two, you have an intake problem.

**None of those are marketing problems. All of them are operations problems. All of them are fixable.**

# From Lead to Client. Faster.

Book a 30-minute intake audit. We'll look at where your leads are leaking, what your consult quality actually is, and what it would take to move both numbers in the same direction.

**Book Your Intake Audit →**

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Outcomes described reflect direct client feedback gathered across recurring performance check-ins between April and May 2026. Specific intake metrics are described qualitatively at the client's discretion.