LegalScapes

INTAKE TRACKING PLAYBOOK

Know how many calls your firm actually answers.

A two-step setup that puts a working intake monitor in place: call tracking connected properly, then daily, weekly and monthly reporting that runs on its own.

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WHY THIS EXISTS

Most firms do not know their answer rate

Two firms can spend the same money, buy the same number of qualified leads, and end the month with wildly different case counts. The difference is almost never the marketing. It is how many of those callers reached a human, how fast someone called back the ones who did not, and whether anybody followed up more than once.

You cannot fix that from memory. You need four numbers every day: total calls, answered calls, answer rate, and qualified leads. This playbook sets those up in about an hour, then keeps them coming without anyone at your firm building a report.

What you will have when you finish

- Call tracking connected, with a separate number for each marketing source.
- A daily morning report with your four core numbers and every missed call listed by time and source, so you can call them back the same morning.
- Automatic flags for coverage gaps, slow callbacks, repeat callers who never got through, and drift from your intake script.
- Weekly and monthly roll-ups with trends, qualified leads by source, and cost per signed case once you share your spend.

One hour of setup, then it runs

Step 1 takes about five minutes. Step 2 is a copy and paste. If you do not have call tracking yet, the instruction set walks you through choosing a platform, creating tracking numbers, installing the snippet, and test-calling your own office to prove the data is right before the first report goes out.

SETUP

Two steps

STEP 1

Create your Viktor account

Viktor is the AI employee we use inside our own agency. It connects to your call tracking platform, runs on a schedule, and reports in plain language. Sign up here:

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https://app.viktor.com/signin?ref=FxSgwXD6LjjQ8qE7cBhSKK
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STEP 2

Import the intake monitor instructions

The file **viktor-intake-instructions.md** comes with this playbook. Open Viktor, paste the whole file in as custom instructions, and say: **"Set up the intake monitor."**

Viktor will ask which call tracking platform you use, or help you pick and implement one, then confirm your hours, practice areas, case criteria, and intake script before the first report.

If you do not have call tracking yet

Either platform works, and both connect to Viktor. Pick one and let the instruction set walk you through it.

PLATFORM	CHOOSE IT WHEN
CallRail	You mainly need call tracking, recording, and per-source numbers. The simplest starting point for a solo or small firm.
WhatConverts	You want calls, web forms, and chat scored together in one place, with lead quality marked at the source.

Either way the non-negotiables are the same: one tracking number per marketing source, the snippet installed site-wide so the displayed number swaps by source, an answered-call threshold that does not count voicemail as answered, and recording where your state's consent rules allow it.

REPORTING

The four numbers, defined the same way every day

Definitions matter more than dashboards. A metric that quietly counts voicemail as an answered call will tell you everything is fine while cases walk to the firm down the street.

METRIC	HOW IT IS COUNTED
Total calls	Every inbound call to a tracked number, deduplicated when the same caller rings twice inside 15 minutes.
Answered calls	Calls that reached a live human, with a minimum talk time of 30 seconds. Voicemail, hangups, IVR-only and after-hours recordings do not count.
Answer rate	Answered divided by total calls, always shown with the denominator.
Qualified leads	Answered calls that are a genuine new matter in your practice areas with nothing disqualifying: not a current client, vendor, wrong number, opposing party, or outside your case criteria.

Daily, weekly, monthly

- **Daily, 8:00 am.** The four numbers for the prior business day, every missed call with time and source, your worst hour, and how the day compares to your trailing 30-day average.
- **Weekly, Monday 8:00 am.** The week against the prior week, answer rate by day and hour, callbacks and median callback time, qualified leads by source, and one recommendation.
- **Monthly, first business day.** A four-month trend, cost per qualified lead by source, cost per signed case, and the single highest-value fix for the month ahead.

What gets flagged automatically

- Two or more missed calls in the same hour, or any miss during business hours.
- No callback within five minutes during business hours.
- Answered calls under 60 seconds - usually a failed transfer or a screened caller.
- A qualified lead with one attempt and no follow-up in 48 hours.
- The same number calling twice without ever reaching a human.
- Required questions from your intake script that were missed on a call.
- A tracking source whose call volume swings more than 40 percent.

BEFORE YOU SPEND MORE

Ten things to have in place

Run this list before you raise a marketing budget. Fewer than seven checked means the next dollar of ad spend buys conversations nobody has.

1. Phone coverage mapped by hour and day, including lunch and evenings.
2. A trained after-hours answer path that reaches a human, not voicemail.
3. A five minute response standard for calls, forms, and chat during business hours.
4. One named owner assigned to every lead on arrival.
5. A written qualification script with your case criteria in plain language.
6. A follow-up cadence of at least six touches over ten days, across channels.
7. E-signature retainers and same-day consult availability.
8. Call tracking numbers per channel, with recording where your state allows it.
9. Every lead in one system, tagged with source, quality, and outcome.
10. A 30 minute weekly intake review with two recorded calls listened to together.

Want us to look at your numbers with you?

Send us a month of call data and we will tell you where the cases are leaking and what it is costing you. No charge, no obligation.

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