



● WORKFLOW AUTOMATION SPRINT · WEEK ONE

Client intake: workflow map and baseline

Family law firm · 12 people · intake into Clio · mapped by Raquel Mercado

Illustrative example. The firm and every number below were invented to show the format of a week-one deliverable.

How does intake run today?

New inquiries arrive three ways. Each one is retyped into Clio by hand, by whoever gets to it first.



Orange text marks a pain point. The outlined step is where a person makes a judgment call.

Handoffs and exceptions

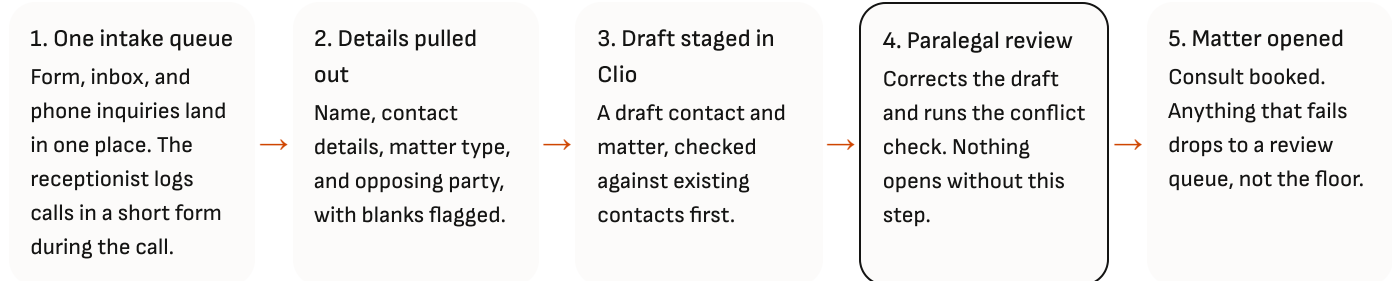
- **No single owner.** Form and inbox inquiries get entered by whoever is free. That is how the same person ends up in Clio twice.
- **Phone notes travel on paper.** A note can sit on the front desk until the receptionist has a quiet hour.
- **Missing details.** Phone notes often need a second look or a quick callback to confirm a spelling or a number.
- **Opposing party left blank.** When it is missing, the conflict check runs on half the information.
- **Existing clients.** A returning client's new inquiry is sometimes entered as a brand new contact.

What does it cost today? The baseline

Counted across one typical week from the form log, the shared inbox, and the phone notes pad.

Measure	How it was counted	Week one
Inquiries per week	14 web form + 9 general inbox + 7 phone notes	30
Retyping into Clio	30 inquiries × 8 minutes each	240 min
Confirming phone note details	7 phone notes × 5 minutes to confirm details	35 min
Cleaning up duplicate contacts	3 duplicates × 10 minutes each	30 min
Total intake admin time	240 + 35 + 30 minutes	305 min (about 5.1 hrs)
Per year	305 minutes × 52 weeks ÷ 60	about 264 hrs
Delay: form to Clio record	Typical, from timestamps	same day
Delay: inbox to Clio record	Typical, from timestamps	1 business day
Delay: phone call to Clio record	Typical, from note dates	2 to 3 business days
Inquiries with no record by Friday	Inquiries matched against Clio at week end	1

What would intake look like after the sprint?



The conflict check and every engagement decision stay with people. The automation only removes the retyping.

What gets measured at 30 days?

- Minutes per week spent on intake admin, against the 305-minute baseline
- Time from first contact to Clio record, by channel
- Duplicate contacts created per week
- Inquiries with no record by the end of the week
- How many drafts the paralegal had to correct, and what was wrong
- How many inquiries went to the review queue, and why

No result is promised. The 30-day review reports the same measures, counted the same way, whatever they show.