A GUIDE BY SUPIO

# Intake Buyer's Guide for Plaintiff Law Firms

In plaintiff law, every missed call carries a measurable cost.

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# Why Great Cases Start with Great Intake

# Why Great Cases Start With Great Intake

In plaintiff law, great cases don't begin in the courtroom; they begin with intake.

Every missed call, delayed response, or inconsistent qualification process creates risk. At the same time, firms are facing increasing competition for cases, rising advertising costs, and prospective clients who expect immediate answers. Intake has never been merely an administrative function; it has always been one of the most important drivers of firm growth.

## *The Revenue at Stake*

Every incoming inquiry represents a massive investment in marketing and a potential signed case. Therefore, an unanswered call isn't just a missed lead; it’s a five- or six-figure case walking directly into the arms of a competitor. Most firms know they are losing opportunities, but few can quantify the exact revenue slipping through the cracks. The bleeding happens in the gaps:

- Calls that hit voicemail after hours.
- Prospects who hang up after long hold times.
- Web inquiries that sit for hours waiting for a callback.
- Qualified leads that wither away due to manual, delayed follow-up.

In plaintiff law, where injured individuals routinely contact multiple firms in rapid succession, speed isn't just a service metric; it’s the ultimate competitive advantage. Research consistently shows that the first firm to respond is overwhelmingly the one that wins the client.

Yet, because intake data is often siloed from marketing data, intake, and case management systems, most firms remain blind to the true cost of their friction.

## *Why Fixing Intake Is So Difficult*

Most firms didn’t design their intake system; they assembled it. Over time, intake becomes a patchwork of answering services, scoring layers, CRM fields, web forms, spreadsheets, and standalone intake tools. Each piece solves a real problem in isolation. Together, they create friction.

A call comes in after hours and gets answered by a third-party service that logs a message in one system. A web lead gets captured in another. A text follow-up happens somewhere else entirely. By the time someone on your team tries to understand what happened with a lead, the full context is scattered across multiple tools or lost entirely.

That fragmentation creates a deeper issue than inefficiency: it makes performance hard to see. Firms often can’t answer basic questions like:

- Which of our marketing channels are driving signed cases?
- Where are we losing prospective clients in the intake process?
- How fast are we really responding across channels?

And because the system evolved gradually, there’s rarely a clear starting point for fixing it. Replacing one piece risks breaking another. So firms optimize around the edges instead of redesigning the system itself.

This is why intake problems persist even in well-run firms: it’s not a lack of effort; it’s the structure of the system itself.

# Why Great Cases Start With Great Intake (Continued)

### *What This Guide Will Help You Do*

Whether you're evaluating AI-powered intake for the first time or replacing an existing solution, this guide is designed to help you make a confident, informed decision.

- Build the business case for improving intake
- Identify where your leads are being lost today
- Evaluate different approaches to intake
- Ask vendors the questions that reveal real capabilities
- Compare solutions based on long-term fit

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# Build Your Firm's Intake Business Case

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Skip the theory. Use this section to map out what AI-powered intake would mean for your firm in practical terms: leads captured, cases signed, and revenue recovered.

### *Step 1: Where are you losing leads?*

Most firms lose potential clients at the same choke points. Check all that apply:

- ☐ Calls coming in after hours
- ☐ Slow speed-to-lead and delayed follow-up
- ☐ Callers hanging up during hold times or hitting voicemail
- ☐ Inconsistent lead qualification
- ☐ No system to follow up on leads that didn't convert immediately
- ☐ Intake team overwhelmed during high-volume periods
- ☐ No standardized rubric for qualifying and disqualifying leads
- ☐ Too much time spent on low-value or unqualified leads
- ☐ No visibility into what's happening on calls and why cases aren't signing

Now estimate your current numbers:

| Metric | Your Current Number |
|---|---|
| Average monthly inbound calls | |
| % of calls answered live | |
| % of calls answered after hours | |
| % of calls that qualify as leads | |
| % of qualified leads that sign | |
| Average case value (estimated) | |

# Build Your Firm's Intake Business Case

## *Step 2: Where are you leaving value on the table?*

Think about leads and cases that slipped through in the last 12 months.

| Missed Opportunity | What it Cost | Could AI have helped? (Y/N) |
|---|---|---|
| Missed after-hours call | Lost average case value | Yes |
| Caller hung up during hold | Lost average case value | Yes |
| Poor qualification | Staff time + costs | Yes |
| No follow-up on warm leads | 20–30% lead decay rate | Yes |

## *Step 3: What would meaningful progress look like?*

Define what "quick wins" would mean for your firm. Check the ones that matter most to you.

- Answer ______ % more calls after hours
- Reduce time-to-qualify from ______ hours to ______
- Increase qualified lead rate from ______ % to ______ %
- Capture ______ more signed cases per month
- Eliminate ______ hours of manual intake work per month

## *Step 4: What's the cost of not doing this?*

Fill in the blanks with your own reality.

We miss approximately ______ calls per month after hours
Each missed call has an estimated case value of $______
That's $______ in potential revenue left on the table monthly
Our intake team spends ______ hours per week on non-qualified calls
We've lost approximately ______ cases to faster-responding firms in the last 6 months

***Don't know the answers? That's valuable information too.***

Many firms don't have this data readily available; and that's exactly where today's AI tools can help. Modern AI tools can connect with your existing systems to help surface these insights, giving you a clear baseline of where you are today and where you have the greatest opportunity to improve.

# Build Your Firm's Intake Business Case

### *Step 5: What does it feel like to be an intake-focused firm?*

Once you've closed the gaps, the real transformation begins. This isn't just about answering more calls; it's about becoming a different kind of firm. This is the shift your team will feel:

- Every caller gets a consistent, professional response – 24/7, including nights, weekends, and holidays
- Your intake team focuses on high-value conversations
- You have full visibility into call quality, lead volume, and conversion rates in real time
- No case slips through because someone was at lunch or it was 11pm on a Saturday
- Your intake team, attorneys, and staff work from the same case record instead of recreating information across disconnected systems.
- New hires onboard faster because intake is standardized, documented, and A assisted
- You stop managing chaos and start scaling strategy
- Clients notice – faster callbacks, smoother onboarding, stronger first impressions

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# Core Questions to Ask (Evaluation Framework)

# Core Questions to Ask

This section gives you the diagnostic lens to cut through the sales pitch and evaluate whether an intake platform delivers the depth, breadth, and flexibility needed to support your firm end to end.

Ask every question below. Look for direct, example based answers. Vagueness is a red flag.

## *AI & Qualification Capabilities*

1. **Does the AI understand the nuances of plaintiff law intake?**
   Ask how the platform captures the specific details that matter in plaintiff law – injuries, incident circumstances, providers, insurance coverage, and any custom intake fields your firm relies on. A strong answer shows the tool was built to structure this data the way plaintiff firms actually use it, not just take a message and log a name and phone number.
2. **Does it provide a voice agent that can be customized to your firm's needs?**
   Ensure you have the ability to customize prompts, escalation rules, and the voice agent's tone so it aligns with your firm's processes and client experience standards.
3. **Can the qualification logic be customized for your firm?**
   Every firm has different intake criteria. Can the system learn your firm's standards, or does it apply a generic template?
4. **How does it handle live handoffs to your team?**
   Ask how the platform routes a high-priority caller to a live person while they're still on the line. Who gets notified, through what channel, and how fast? A real warm transfer, not just a callback queue, is the difference between capturing a high-value case and losing it to the next firm on the list.
5. **Does it handle callers in multiple languages?**
   Depending on your market, you may need support beyond English. Ask which languages the platform handles natively.

## *Coverage, Integration & Stack*

1. **Does it cover all intake channels – phone, web, SMS, and email?**
   Many platforms are phone-first and require separate tools for web form leads, SMS, email inquiries, creating data lag and blind spots. Ask whether all channels flow into the same scoring and routing system, or whether web and email leads get treated differently than calls.
2. **Does it integrate with your CMS and telephony stack?**
   Ask specifically about your case management system and your phone provider. Siloed data creates new problems.
3. **How many tools does it replace in your current intake stack?**
   Most firms already have a patchwork: an answering service, a transcription tool, a qualification layer. Ask what this platform eliminates versus what it adds. If it's one more tool on top of your existing stack – rather than consolidating it – the cost and complexity only grow.
4. **Does the platform connect intake activity to the full case lifecycle (case progression, litigation activity, and settlement outcomes)?**
   Most intake tools stop at the intake stage. Ask whether the platform gives your firm a single view of the client journey so you can understand which lead sources, qualification decisions, and intake behaviors consistently produce the strongest outcomes.

# Core Questions to Ask

### *Rep Performance*

1. **Does it help your reps improve or just monitor them?**
   Recording calls and reviewing them later is not coaching. Ask whether the platform scores call quality automatically and gives managers actionable data to coach from, not just a library of recordings to review when something goes wrong.

### *Automation, Outbound & Administrative Capabilities*

1. **Does it automate intake follow-up and case qualification?**
   Ask whether the platform automatically follows up with prospective clients who submit a web form but don't complete intake, gathers any missing information through automated outreach, and helps qualify or disqualify cases using email and text messaging. The best systems reduce manual intake work by moving qualified prospects forward while efficiently closing out cases that aren't a good fit.
2. **Does it automatically re-engage prospective clients who haven't signed?**
   Leads lose momentum quickly. Ask whether the platform can automatically reach back out to prospects who've already contacted the firm but haven't signed without cold prospecting or bar rule violations. The right system keeps your pipeline warm without requiring staff to manually track every open lead.

### *Proof & Results*

1. **Can they show results from plaintiff firms like yours?**
   Ask for actual outcomes:

   - "What changed in the first 60 days for a firm similar to mine?"
   - "Can you share examples of gains in signed cases, response times, intake efficiency, or marketing ROI?"
   - "How much do conversion rates typically improve for firms similar to ours?"

### *Security & Compliance*

1. **What are their security standards?**
   HIPAA, SOC 2, encryption in transit + at rest – get all the paperwork.

2. **Where is your data stored, and who can access it?**
   Look for clear, transparent policies on where your data is stored (including the countries or regions where it resides), who has access to it, and under what circumstances.

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# Comparing Different Intake Approaches

# Comparing Different Intake Approaches

Most firms don't start from scratch. They're already relying on one of the approaches below. Before evaluating something new, it's worth asking: is what you have actually helping scale your intake so you can sign more cases?

Here's how the most common intake approaches stack up and where each one breaks down.

| Approach | How Firms Use It | The Core Problem | Works Best If... | Covers 24/7? |
|---|---|---|---|---|
| **Answering Services** | Third-party call centers that handle inbound calls when staff isn't available for a monthly fee | Costs escalate quickly with little visibility. Most answering services function as message takers — capturing high-level information but doing little to support qualification and conversion. | You only need basic call coverage and your team is prepared to followup on every call to gather qualifying information. | Yes |
| **Voicemail** | Unanswered calls routed to a recorded message and callback queue | A passive dead end. Claimants don't wait; they move to the next firm. | Call volume is low enough that no lead ever waits more than minutes | No |
| **Offshore Vendors** | Outsourced intake teams, often overseas, at reduced cost | Quality varies widely. Keeping performance consistent requires constant oversight most firms can't sustain. | You have dedicated staff to manage vendor quality and performance daily | Yes |
| **In-House Intake Teams** | Full-time employees handling all inbound calls during business hours | Coverage ends when the office closes. Scaling intake means scaling headcount. | Call volume is manageable and budget for dedicated headcount is strong | Business hours only |
| **Plaintiff-Specific Operating Systems (e.g.Supio)** | AI intake built specifically for plaintiff firms — handles calls, multi-channel leads, qualification, routing, and rep coaching in one platform, 24/7. Combines intake, communications, case intelligence, and litigation workflows in one system. | The upfront investment may be higher than point solutions, but it delivers a broader set of capabilities in a single platform. | Firms that want comprehensive intake coverage, measurable case outcomes, and the option to connect intake intelligence to the full case lifecycle. | Yes, 24/7 |

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# What Happens After You Buy

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Even the best intake solution won't help if it doesn't get used. What you do in the first 30 to 60 days post-purchase sets the tone for success or stalls out adoption.

Here's how to drive momentum once the contract is signed.

### 1. *Launch a small pilot first*

Start with a subset of your inbound lines – after-hours calls are the easiest win. Capture the results. Use those early wins to build internal buy-in.

### 2. *Track the right metrics from day one*

Don't wait for a quarterly ROI report. From week one, measure:

- Qualified leads per week, and the trend over time
- Conversion rate growth month over month
- Rescued leads and cases signed from rescued calls
- Time saved by intake staff on non-qualifying calls

### 3. *Train your team around real workflows – not just features*

Skip the product tour. The goal is making your team faster and more consistent from day one. Focus on:

- How to review AI-qualified leads and act on them quickly
- How to act fast when the AI routes a high-value lead – understanding the alert and the recommended next step
- How to use coaching data to identify where reps can improve call-by-call

### 4. *Create internal champions*

Make someone on your team (ideally your intake manager) the point person. They should be able to field questions, share wins internally, and keep feedback flowing to your Supio team.

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### 5. *Don't stop at the first win*

Once your team sees value in after-hours coverage and lead qualification, expand:

- • Expand AI intake beyond after-hours coverage to capture demand across additional channels – like web and email – in a single workflow
- Connect intake performance to the entire case lifecycle so you can understand which marketing channels, qualification decisions, and client characteristics produce the strongest outcomes.
- Activate outbound capabilities for scheduling, booking consultations, sending appointment reminders, and reaching back out to prospects who haven't yet signed
- Automate records retrieval, claim statuses, and FNOL, so your staff isn't spending hours on hold or composing the same follow-up emails

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# Final Checklist + Decision Readiness

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### *Core Capabilities*

- ☐ Does it ask the right questions to assess liability, damages, and coverage?
- ☐ Can it handle 24/7 volume including after-hours and weekends?
- ☐ Does it integrate with your CMS and telephony system?
- ☐ Does it have a lead rescue function?
- ☐ Does it support callers in other languages (if relevant to your market)?
- ☐ Does it support outbound workflows?
- ☐ Does intake data flow directly into your case work?

### *Workflow Fit*

- ☐ Can your intake team use it without extensive retraining?
- ☐ Does it reduce the burden on live staff or add a new layer of complexity?
- ☐ Does it provide real-time reporting and analytics on call quality?

### *Security & Compliance*

- ☐ Is it HIPAA and SOC 2 compliant?

### *ROI Potential*

- ☐ Can it show lead volume and conversion rate metrics?
- ☐ Can it demonstrate rescued leads and after-hours case captures?
- ☐ Will you see measurable results in the first 30–60 days?

### *Vendor Maturity*

- ☐ Do they offer live onboarding and a dedicated point of contact?
- ☐ Are they shipping new features regularly, not just promising them?
- ☐ Do they act on intake specialist feedback and show a real product roadmap?

### *Final Decision Factors*

- ☐ Did you run a test call or pilot with real inbound volume?
- ☐ Do your intake team, COO, and managing partners agree it fits how your firm works?
- ☐ Is someone on your team ready to own the rollout?

***If you're checking more 'no' than 'yes,' hit pause. The right platform is out there — don't settle for the one that had the best demo.***

# What's at Stake

## What’s at Stake

Choosing an intake platform isn't just about answering more calls. It's about creating a repeatable system for capturing, qualifying, and converting the right cases while giving your team the visibility to continuously improve.

As you evaluate vendors, look beyond individual features. Consider how each platform fits into your firm's broader operations, how well it supports your intake team, and whether it can grow alongside your practice over time.

The strongest solutions don't treat intake as an isolated function. They connect the information gathered during the first conversation with everything that happens afterward, helping firms understand which marketing efforts, qualification decisions, and client experiences ultimately lead to the best case outcomes

That’s the philosophy behind Supio Intake. Native to Supio Agent, Supio Intake is built as part of a broader system that spans the full case lifecycle, rather than operating as a standalone intake tool or point solution.

Within that system, Supio Intake brings together AI-powered voice coverage, lead capture, qualification, routing, coaching, outbound automation, and client communications in a single connected workflow. The goal is to ensure that every opportunity is captured, followed up on when needed, and guided into the right next step without losing context between interactions.

Because it’s embedded in Supio Agent, intake isn’t an isolated step; it becomes part of a continuous flow of information across the entire case lifecycle. Every interaction feeds into a unified operating system that helps firms understand which marketing sources, conversations, and qualification decisions lead to the strongest case outcomes. Instead of adding another point solution, Supio Intake helps firms create a connected, data-driven workflow that links first contact to resolution.

If you’re exploring how AI can improve your firm’s intake process, we’d be happy to show you how it works in practice.

### *Why Trust Us?*

Supio partners with hundreds of plaintiff and mass tort firms across the country, from boutique trial teams to national litigation leaders. Our intake capabilities were developed alongside intake directors, managing attorneys, and operations leaders who understand the unique demands of plaintiff law. Those real-world insights shaped both this guide and the platform itself.

***Intake isn't just your pipeline. It's the beginning of every successful case. The firms that perform best don't optimize intake in isolation; they connect it to everything that happens next.***

## Ready to see what purpose-built plaintiff law intake actually looks like?

Book a demo at supio.com/request-a-demo.

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