The Consultation-to-Engagement Kit

A practical marketing field guide for lawyers

Help the right clients take the first step.

A complete marketing kit for small law firms: a clearer consultation page, practical intake scripts, a thoughtful follow-up process and a measurable path to an appropriate engagement.



A clear offer. A useful conversation. A measurable process.

Includes a six-step guide, twelve original scripts, a 30-day plan and working pages for your own campaign.

Free edition / Version 1.0 / marketingcoach.cc

Your first useful result

Set aside 15 minutes. Start with one real decision in your business.

Do this first

Review one inquiry that stopped before a consultation. Check whether the person could find your practice area, jurisdiction, consultation fee and response process. Improve the missing detail before sending an approved reply.

Who this is for

Solo lawyers and small firms with an existing stream of inquiries. The worked example focuses on non-urgent estate-planning consultations.

The problem to solve

A prospective client cannot tell whether the firm handles their situation, what the first meeting costs, or what happens after making contact. The inquiry stalls before either side can assess fit.

What you will build

Create a clear first-contact experience, a consistent intake handoff and a weekly view of consultation follow-through.

How to use the kit

Read the guide to understand the sequence. Use the workbench to draft your plan and messages. Review the same inquiry cohort in the scorecard. Keep private customer information in your existing systems. Export the workbench JSON to retain an editable backup.

Open the editable tools: marketingcoach.cc/downloads/industries/lawyer/workbench.html

The workflow at a glance

Each step produces an artifact you can use. Keep the process visible to your team.

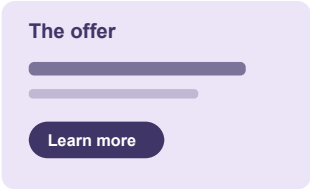
MarketingCoach / Lawyers

A clearer path to a decision.

Relevant inquiry to an appropriate legal engagement

1 Explain the first conversation

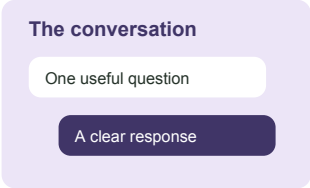
Name the practice area, jurisdiction, attorney, consultation scope and fee. Explain how a request becomes a confirmed appointment.



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2 Route the inquiry appropriately

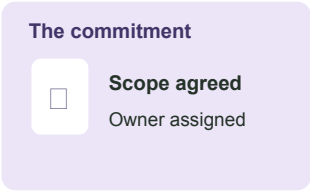
Use approved intake questions and conflict procedures. Give staff a defined route for urgency, unsupported matters and legal questions.



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3 Clarify the engagement decision

After consultation, explain approved scope, fees, exclusions and acceptance steps. Keep the decision with the responsible attorney.



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4 Review the same inquiry group

Count relevant inquiries, bookings, attendance and accepted engagements. Use anonymous themes to improve the process.



Keep one useful artifact from every step.

Build a page that helps people decide

Use this anatomy before adding more traffic.

MarketingCoach / Page anatomy

One page. One clear decision.

Your business

Understand your first estate-planning consultation.



See who you will meet, what the conversation covers and the consultation fee. Our team explains the intake process before confirming an appointment.

Request consultation details

Make the practical details visible

Scope. Price. Timing. What happens next.

Show evidence people can assess.

Real credentials, a useful sample and clear process.

Explain the first step.

Who responds? How is the request confirmed?

1 **The promise**
Name the person and the decision.

2 **The action**
Say exactly what the click does.

3 **The details**
Answer scope, price and timing.

4 **The evidence**
Use facts you can substantiate.

5 **The handoff**
Explain what happens afterwards.

Fictional teaching example. Replace every example with your actual offer.

1. Choose one practice area and first decision

Read, apply, and keep the result.

A small firm's homepage often lists everything it can do. A campaign page should help one type of prospective client understand one sensible first step. Begin with a service the firm actually has capacity to provide. The example here is an estate-planning consultation, not urgent litigation, criminal defense or an open invitation to submit any legal problem.

Ask the intake owner which non-confidential questions repeatedly delay scheduling. Look for uncertainty about jurisdiction, practice fit, attorney availability, consultation price, meeting format and the distinction between a consultation and ongoing representation. Summarize themes without copying case narratives, names or documents into a general marketing tool.

Write an offer that identifies the responsible attorney, the consultation's scope, duration and real fee. Describe what is excluded and what must happen before the firm confirms a meeting. A qualified lawyer should approve the language and decide which advertising, fee and solicitation rules apply in the jurisdictions involved. ABA Model Rules are a reference, not a substitute for those rules.

Put it to work

Write: For [audience] in [jurisdiction], our [duration] consultation with [attorney] covers [scope] for [fee]. [Excluded work] requires a separate agreement.

You are done when

The attorney and intake owner can explain the same offer, capacity and acceptance process.

Your notes

2. Build a page that answers the first five questions

Read, apply, and keep the result.

Place the practice focus, consultation purpose and action near the top. Then answer five questions: does this firm serve my location, who will I meet, what does it cost, what does the consultation cover, and how is a request confirmed? Use the attorney's actual credentials and an accurate professional photograph when available.

Create a short practice-area explanation, a consultation details block, a process section and a practical FAQ. State whether the initial call is administrative screening or legal advice. Make contact options, staffed hours, accessibility and rescheduling information easy to find. Do not use stock models as attorney portraits or imply that a fictional example describes a real client result.

The marketing page should lead into the firm's approved intake process. Avoid an open invitation to paste sensitive facts into a public form. The firm's lawyer should set appropriate first-contact notices and instructions; a disclaimer does not by itself resolve confidentiality duties or relationship formation. Test the whole request and confirmation on a phone.

Put it to work

Use the annotated page graphic and landing-page builder. Replace every placeholder and have the responsible attorney approve the request route.

You are done when

A new visitor can identify the five practical details and understand what the button actually does.

Your notes

3. Give intake a useful and consistent response routine

Read, apply, and keep the result.

Assign one intake owner and a backup. Set a response target based on staffed hours and real capacity. Use an acknowledgement that explains the process and the next administrative step, without suggesting that the firm has accepted a matter. The lawyer should define the necessary conflict screening and information-handling procedures.

Train staff to distinguish logistics from legal advice. Staff can explain a published consultation fee, location or scheduling process. Questions about rights, remedies, filing dates or how to proceed require the firm's approved legal escalation. Urgent matters need a specific routing procedure; they should not wait inside an ordinary marketing follow-up sequence.

The swipe file is intended for approved responses to people who contacted the firm, not unsolicited targeting of people with a known legal problem. Follow the contact preference and agreed timing. Pause the sequence when a person replies, books, declines or asks you to stop. Keep sensitive details in the firm's system rather than message templates or campaign notes.

Put it to work

Adapt the inquiry acknowledgement, appointment details and scheduling follow-up. Assign an owner and escalation route for each.

You are done when

Every open inquiry has an appropriate status, owner and response date in the approved system.

Your notes

4. Separate attendance from an accepted engagement

Read, apply, and keep the result.

A confirmed consultation needs practical instructions: date, time zone, location or meeting link, attendee, fee and rescheduling route. Use the firm's secure process for requested documents. Give the person only the preparation information the attorney has approved; do not add a broad document upload to a marketing form.

After the consultation, the responsible attorney decides whether the firm can offer an engagement and what it includes. A clear summary can identify scope, excluded work, fees, responsibilities and the required acceptance process. The marketing team should not improvise legal terms or turn a polite follow-up into pressure to retain the firm.

Record the actual outcome. Some consultations properly end without an engagement. If the firm declines or the person does not proceed, use the firm's approved closing or non-engagement procedure, including any lawyer-determined deadline communication. A generic close-the-loop marketing message is not a substitute for that procedure.

Put it to work

Walk through a test appointment, an accepted engagement and a declined matter with the intake owner and attorney.

You are done when

Each outcome has an approved handoff and no one counts a consultation as a retained client.

Your notes

5. Publish one useful practice-area explainer

Read, apply, and keep the result.

Create a practical article such as "What to expect at your first estate-planning consultation." Explain the meeting format, questions a person may ask about the service, fee, documents requested through secure intake and the possible next steps. Keep legal substance within the attorney's approved scope and jurisdiction.

Link the article from the relevant practice page and share it through an existing appropriate channel. Professional referral contacts can receive a factual service overview when permitted. State the types of matters the firm actually handles, location and intake route; do not imply an unapproved referral payment or reciprocal arrangement.

Use real process evidence: a named attorney introduction, the actual office, a plain-language fee explanation and an example meeting agenda. If the firm uses reviews, testimonials or case outcomes, have the lawyer review the applicable requirements and permissions. Do not assume a disclaimer fixes a misleading result claim.

Put it to work

Publish one attorney-approved consultation explainer and connect it to the same request page from one existing channel.

You are done when

The article, practice page and intake response describe the same first step.

Your notes

6. Measure appropriate progress without exposing client information

Read, apply, and keep the result.

Define a relevant inquiry before counting: for example, a request within the firm's stated practice and geography. This is an operational filter, not a legal determination. Keep excluded inquiries visible in the firm's operational review with broad reasons, so a lower count does not hide a broken request route or routing problem.

Follow the same inquiry cohort through booking, attendance and accepted engagement. Use a review window long enough for the actual decision cycle. Do not divide this week's retainers by unrelated inquiries from this week. Accepted engagements must use the firm's real acceptance definition, not a button click, verbal interest or unsigned document.

Use aggregate counts and anonymous question themes in this toolkit. Keep matter values, client identities, conflict details and legal facts elsewhere. If booking is low, investigate clarity and availability; if acceptance is low, inspect fit and scope. Make one change, record the date and review comparable cohorts without treating a small sample as proof of causation.

Put it to work

Hold a 15-minute weekly review of aggregate stages, response coverage and the most common unresolved practical question.

You are done when

The team selects one specific service-page or intake improvement with an accountable owner.

Your notes

A worked example

Harbor Planning Law (fictional) / Fictional teaching example

Audience

Adults in the firm's licensed jurisdiction asking about a first estate-planning consultation

Offer

A 45-minute consultation at a disclosed $200 fee, subject to intake and conflict review. Drafting, filings and ongoing representation are separately scoped.

Capacity

Twelve consultation appointments available over four weeks

Budget

$0 new media spend; reserve four staff hours for the practice page and inquiry review

One cohort, four observations

Relevant inquiries: 20 | Starting cohort

Consultations booked: 12 | 60.0% of previous stage

Consultations attended: 10 | 83.3% of previous stage

Engagements accepted: 4 | 40.0% of previous stage

What to investigate

Twelve of twenty relevant inquiries booked. Review missing fee and process information first. Four of ten attended consultations led to accepted engagements; record anonymous reasons for the others, including unsuitable scope, conflicts, timing or a decision not to proceed. Lower acceptance is not automatically a failure.

These counts are not client results, forecasts, targets or industry benchmarks. Follow the same group through the review window. Late decisions remain open until reviewed.

The original swipe file

Messages 1-3 of 12 / Adapt the brackets and review before use.

Inquiry acknowledgement

For a person who contacted the firm; have the attorney approve the wording.

Hello [first name], thank you for contacting [business]. Our team will review whether your request fits our practice and explain our intake process. Please use [approved intake route] for the information we request, rather than sending confidential details here. This acknowledgement does not confirm that we will represent you. Our staffed hours are [hours].

Consultation details

After approved initial screening, explain the actual appointment.

Our [duration] consultation with [attorney] covers [approved scope] and costs [fee]. [Excluded work] is separate. Appointments are [format/location] and require [approved confirmation steps]. You can request an available time here: [link].

Consultation fee question

Answer the price question without promising a matter outcome.

The consultation fee is [fee] for [duration and scope]. It does not include [excluded services]. If the firm can offer further work, we explain its scope and fees through our engagement process. Appointment details: [link].

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

The original swipe file

Messages 4-6 of 12 / Adapt the brackets and review before use.

Scheduling follow-up

For a requested consultation, at an appropriate agreed interval.

Hello [first name], did you find the appointment information you needed? I can clarify the consultation fee, meeting format or scheduling process. If you would like to continue, use [approved route]. If you prefer no scheduling follow-up, please let us know.

Appointment confirmation

Only after the firm confirms the appointment.

Your consultation with [attorney] is confirmed for [date, time and time zone] at [location or meeting link]. The fee is [fee]. Approved preparation instructions: [secure link]. To reschedule, contact [contact]. Please use the secure route for documents.

Appointment reminder

Use the approved reminder channel and avoid case details.

A reminder of your appointment with [business] on [date and time]. Meeting and arrival information: [link]. If your availability has changed, please contact [contact] so we can explain the rescheduling options.

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

The original swipe file

Messages 7-9 of 12 / Adapt the brackets and review before use.

Missed consultation

Offer a neutral scheduling route without discussing the matter.

Hello [first name], we were unable to meet at the scheduled time. If you would like to discuss another appointment, please contact [contact]. We will confirm current availability and any applicable scheduling terms before you decide.

Engagement clarification

Use only after the lawyer authorizes an engagement offer.

Following your consultation, [attorney] has provided the proposed engagement through [approved secure route]. Please review the scope, exclusions, fees and acceptance steps there. For questions about those terms, contact [authorized person]. Work begins according to the agreed engagement process.

Pause requested by the prospective client

Confirm a scheduling pause; legal closing notices need separate review.

Thank you for letting us know. We have paused this scheduling follow-up as requested. If you wish to contact the firm again, use [contact]. Any matter-specific or deadline communication will come through the firm's approved process.

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

The original swipe file

Messages 10-12 of 12 / Adapt the brackets and review before use.

Consultation explainer post

A factual public post reviewed under the applicable advertising rules.

What happens at a first [practice area] consultation? At [business], you meet [attorney], discuss the approved consultation scope and understand how any further engagement would be considered. See the fee, meeting format and intake process: [link].

Professional referral overview

For an appropriate existing professional contact; no referral arrangement is implied.

For your reference, [business] handles [practice scope] in [jurisdiction]. People seeking consultation information can contact [approved intake route]. The page explains the appointment fee and screening process. Please do not send confidential client information through this message.

Short introduction video

Film the actual attorney; review claims and credentials before use.

I am [attorney] at [business]. We help with [accurate practice description] in [jurisdiction]. If you are considering a consultation, our page explains its scope, fee and meeting format. Our team will explain the intake process before confirming an appointment. Learn more at [link].

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

Your first 30 days

Choose a realistic owner and review date for each week.

Week 1 / Clarify the first meeting

Choose one practice area; confirm jurisdiction, fee, scope and capacity; revise the consultation page.

Keep: Attorney-approved offer and request route

Week 2 / Improve intake replies

Assign coverage; adapt three approved messages; test urgency and conflict-review handoffs.

Keep: Every inquiry has an owner

Week 3 / Support the decision

Test confirmation and secure preparation; publish one consultation explainer.

Keep: Attendance and engagement steps reviewed

Week 4 / Review the inquiry cohort

Compare booking, attendance and acceptance; identify one recurring question and improve its answer.

Keep: One measured process improvement

Your campaign brief

Complete this before publishing or spending. Use anonymous business information.

Audience and specific situation

Offer, price and scope

Capacity, channel and budget

Owner and review date

Hypothesis: change, observation and reason

Your weekly scorecard

Track the same cohort. Do not mix new inquiries with bookings from earlier periods.

Cohort and review window

Relevant inquiries

Consultations booked

Consultations attended

Engagements accepted

Observed questions or reasons for no decision

One improvement, owner and review date

Ready to launch?

Make the actual customer journey work before increasing distribution.

[ ] The offer, scope, price, capacity and terms are accurate.

[ ] Every placeholder and fictional business detail has been replaced.

[ ] Photos are permitted and claims have supporting evidence.

[ ] The primary action works on a phone and reaches the right destination.

[ ] The confirmation explains what happens next.

[ ] Someone owns responses and respects contact preferences.

[ ] Private customer information stays in approved systems.

[ ] Clicks, inquiries, bookings, completed work and revenue are separate.

[ ] The review uses the same cohort and allows time for delayed decisions.

[ ] The workbench has an exported editable backup.

Industry review

Keep names, case facts, conflicts, deadlines and documents in the firm's approved intake system, never in this workbench or analytics. A lawyer must review local advertising and solicitation requirements. Do not promise outcomes or treat an inquiry as acceptance of representation.

References and useful links

Original editorial workflows. Review requirements that apply to your business before launch.

ABA Model Rule 7.1: Communications about a lawyer's services

https://www.americanbar.org/groups/professional_responsibility/publications/model_rules_of_professional_conduct/rule_7_1_communication_concerning_a_lawyer_s_services/

ABA Model Rule 1.18: Duties to prospective clients

https://www.americanbar.org/groups/professional_responsibility/publications/model_rules_of_professional_conduct/rule_1_18_duties_of_prospective_client/

ABA Model Rule 7.3: Solicitation of clients

https://www.americanbar.org/groups/professional_responsibility/publications/model_rules_of_professional_conduct/rule_7_3_direct_contact_with_prospective_clients/

Photo credit

fauxels / Pexels. Stock models are not MarketingCoach clients.

https://www.pexels.com/photo/photo-of-three-people-smiling-while-having-a-meeting-3184338/

https://www.pexels.com/license/

Use and adaptation

Use and adapt the original templates in your own business. Share the kit page with others. Do not resell the kit or present fictional examples as your results. Stock photos remain subject to their source license.

Optional help with your real plan

The existing $350 Marketing Clarity Session reviews one audience, one offer and three priorities for the next 30 days. Review scope before booking.

https://marketingcoach.cc/services/marketing-clarity

Your online kit

https://marketingcoach.cc/resources/lawyer-marketing-kit