[Your firm name]

General (any practice) - Short web form

Full name

Phone number

Email address

What kind of legal help do you need?

What happened? A few lines is fine.

How did you hear about us?

☐ Google search ☐ Google Maps ☐ An online ad ☐ Referral from a person ☐ Social media ☐ Other

☐ It is OK to text me about my inquiry (optional)

[Send]

[Add your firm's disclaimer here, worded by your ethics counsel.]

[Your firm name]

General (any practice) - Intake call sheet

CONTACT DETAILS

1. Full name

2. Best phone number

3. Email address

4. Best time and best way to reach you (call, text or email)

5. City and state where you live

6. Preferred language. Do you need an interpreter?

CONFLICT CHECK

7. Full names of the other people or companies involved (the opposing parties)

8. Anyone else connected to this matter, such as a witness, employer, landlord or insurance company

9. Have you or a family member ever been a client of this firm?

☐ Yes ☐ No

THE MATTER

10. What kind of legal matter is this?

11. Where did this happen, or which court or agency is involved?

12. In your own words, what happened and what help do you need?

13. Have you already spoken to or hired another attorney about this? If yes, who and when?

14. What would a good result look like for you?

KEY DATES

15. Key dates: when it started, and any date coming up

16. Any letter, notice or court paper you have received about this? The date on it, and whether you have it with you

HOW THEY FOUND YOU

17. How did you hear about us?

☐ Google search ☐ Google Maps ☐ An online ad ☐ Referral from a person ☐ Social media ☐ Other

18. If a referral: who referred you? If an ad or a search: what were you looking for, or what did you see?

CONSENT TO CONTACT

19. Is it OK for us to call and email you about this inquiry?

☐ Yes ☐ No

20. Is it OK to leave a voicemail or message at this number?

☐ Yes ☐ No

21. Is it OK to send you text messages about this inquiry?

☐ Yes ☐ No

FOR THE FIRM TO COMPLETE

Call taken by

Date and time of the call

Result (consultation booked, signed, referred out, declined)

Next step, who owns it and by when

A starting point for your intake team. Not legal advice. Have your ethics counsel review it before you use it.