



DONE-FOR-YOU TEMPLATE

The AI-Ready Client Intake Script

The exact questions a great intake flow asks every prospective client — qualify the matter, run a conflicts pre-check, and book the consultation, all without ever giving legal advice. Use it for your front desk, your web form, or an AI receptionist.

Qualify every lead.
Book the right ones.

Presented by **Embido**
embido.com

HOW TO USE THIS

A repeatable intake flow, step by step

Work through these eight steps in order. The goal is to gather what you need to decide whether to take the matter and to book a consultation — not to advise the prospect. Keep it warm, brief, and consistent for every inquiry.

1

Greet & set expectations

"Thanks for reaching out to [Firm Name]. I can ask a few quick questions to point you to the right attorney and get a consultation on the calendar. I am not able to give legal advice, and nothing here creates an attorney–client relationship."

CAPTURE: Tone, consent to proceed

2

Contact information

"Could I get your full name, the best phone number and email to reach you, and your city or county?"

CAPTURE: Full name · phone · email · location

3

Practice area & matter type

"What kind of legal issue are you dealing with — for example, family, estate, business, injury, or something else? And in a sentence or two, what is going on?"

CAPTURE: Practice area · matter type · brief description

4

Jurisdiction

"Where did this take place, and in what state or county? Are any documents already filed with a court?"

CAPTURE: Jurisdiction · venue · filing status

5

Urgency & key dates

"Are there any upcoming deadlines, court dates, or important dates I should know about? Is anything time-sensitive?"

CAPTURE: Deadlines · hearing dates · urgency level

6 Conflicts pre-check

"So we can check for any conflicts, who is the other party or company involved, and is anyone else connected to the matter?"

CAPTURE: Adverse parties · related names · entities (for attorney conflict review)

7 Fit & expectations

"Have you worked with an attorney on this already? And what are you hoping to achieve? This helps us make sure we are the right fit before we meet."

CAPTURE: Prior counsel · goals · fee/format expectations

8 Book the consultation

"Based on what you have shared, the right next step is a consultation with one of our attorneys. I have [day/time] or [day/time] open — which works better? You will get a confirmation by email."

CAPTURE: Booked time · calendar invite · confirmation sent

Keep it UPL-safe — what intake should never do

- ✓ **Never answer "what should I do?" or predict an outcome.** Redirect: "That is exactly what the attorney will cover in your consultation."
- ✓ **Never quote a result or guarantee.** Qualify and route — the attorney advises.
- ✓ **Always include a disclaimer** that no attorney–client relationship is formed by the intake conversation.
- ✓ **Hand off advice questions** to the consultation rather than attempting an answer.

Want this running 24/7? Embido's **Client Intake Agent** follows a flow exactly like this on your website — qualifying by practice area, matter type, jurisdiction, and urgency, running a conflict-of-interest pre-check, and booking straight into your calendar. It is built to be **UPL-safe** by design and adds a disclaimer to every reply. Add it to your site in an afternoon at embido.com.

For general informational purposes only; not legal advice. Conflict pre-checks are advisory — the attorney makes the final determination. Adapt this script to your jurisdiction's rules of professional conduct. © 2026 Embido.