



# Intake Follow Up Scheduler

One of the Best Practice Systems our Successful Clients Have Used!

**Instructions:** When a positive condition is met, move to next appropriate workflow

Message Type	Lead Not Booked	Booked	No Show	Showed but Did Not Hire	Hired	Case Closed
	Follow up 1	Confirmation	Reschedule	Summary	Confirmation	Ask for Review
	Follow up 2	Reminder 1	Follow up 2	Follow up 2	Thank you	Ask for Review 2
	Follow up 3	Reminder 2	Follow up 3	Follow up 3		
	Follow up 4		Follow up 4	Follow up 4		
	Follow up 5		Follow up 5	Follow up 5		
	Follow up 6		Follow up 6	Follow up 6		
	Follow up 7			Follow up 7		
	Follow up 8					
	Follow up 9*					

**Note:** Follow ups should be a combination of **calls, texts, email, vmail, and postal mail.**

**Note:** Post-consult follow up is designed for cases that the attorney **WANTS to pursue, NOT for every consult that does not hire.**

\*7-9 contacts or until they say 'No'.

**Ex. Contact with a particular client might look like this:**

Workflow Order	Workflow:	Event:
	New Lead Acquired	PNC fills out a form fill
	Lead Not Booked	Follow up sent, no reply
	Lead Not Booked	Follow up 2 sent, no reply
	Lead Not Booked	Follow up 3 sent, consultation booked
	Booked	Confirmation sent
	Booked	Reminder sent
	Booked	Reminder sent
	Showed but DNH	PNC has consultation, does not hire on spot
	Showed but DNH	Summary of consultation sent
	Showed but DNH	Follow up 2 sent, no reply
	Showed but DNH	Follow up 3 sent, no reply
	Showed but DNH	Follow up 4 sent, PNC hires
	Hired	Confirmation and thank you sent
Case Closed	Ask for a review	
Case Closed	Ask for a review 2	