

BUYER'S GUIDE · 2026

# The law firm's complete guide to AI receptionists

Understand the landscape, evaluate solutions, and confidently choose the right AI front office partner for your practice.

Managing partners

Firm administrators

# Don't buy a tool. Build a system.

The AI call-handling space has exploded — and “AI receptionist” now describes everything from a robotic voicemail box to a fully integrated front office. For a law firm, the wrong pick means missed cases, broken intake, and compliance risk. The right one becomes the first impression every potential client receives.

This guide breaks the entire decision in three parts: understand what you're actually comparing, define what you need before you talk to anyone, then evaluate vendors with a framework built for law firms. No fluff, no vendor-speak — just the information that matters.

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## What's Inside

### PART ONE

## Understand the landscape

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### PART TWO

## Write your AI receptionist's job description

Your pain points, the jobs to be done, and what missed calls really cost.

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### PART THREE

## Evaluate partners with a framework built for law firms

Map your systems, score the four C's, and decide with confidence.

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## PART ONE

# Understand the landscape

Before you can compare vendors, you have to know what you're looking at. Not all “AI receptionists” are the same species — and the differences that matter most are the ones a demo will never show you.

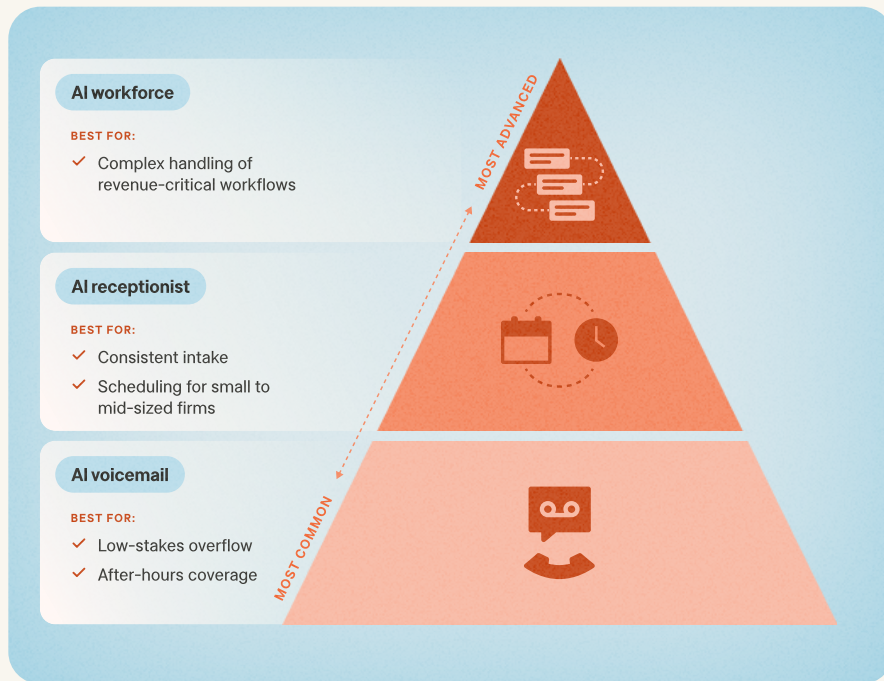
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# The three tiers of AI call handling

“AI receptionist” spans a huge range. Three tiers tell you what you're really comparing — and what you'd be paying for.



How to read it

## Volume and stakes push you up.

The more calls you field, and the more a new client is worth, the higher the tier you need.

## Most firms live in the middle.

A true AI receptionist that runs real intake fits the majority of practices.

## Voicemail is for overflow only.

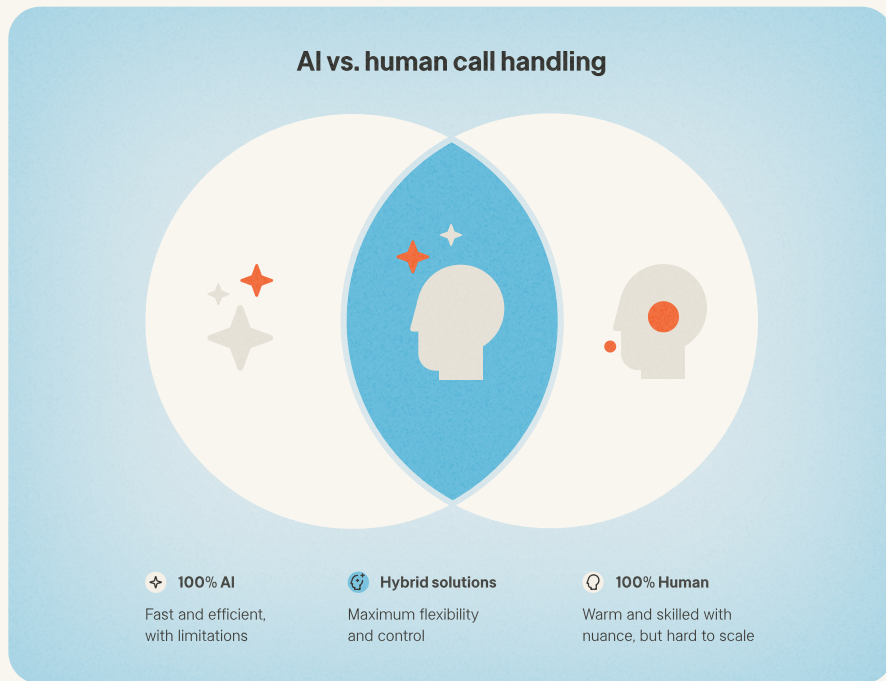
Treat the base tier as backup — never your front door.



It isn't features — it's whether the system answers your phones, or runs your front office.

# The role of humans

AI scales; people bring empathy and judgment. The blend between them is what decides your hardest calls.



What to look for

**Pure AI is efficient and affordable, but capped.**

Great for routine calls; it strains on emotion and real nuance.

**All-human is warm but costly.**

Hard to scale, and quality swings by who picks up the phone.

**Hybrid strikes the balance.**

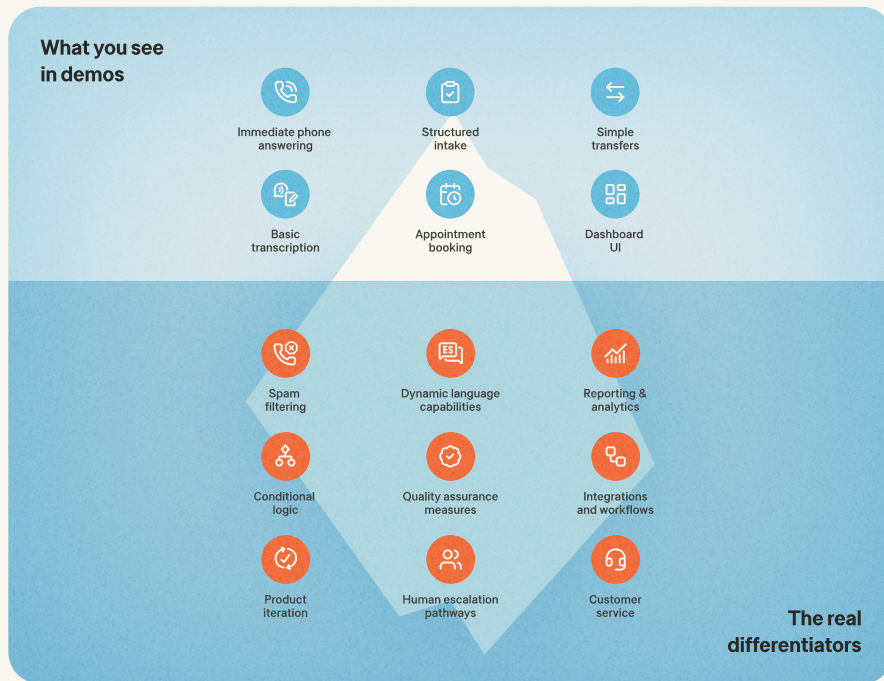
AI handles volume and hands off the moments that need a person.

Not “AI or humans?” but “what should AI handle vs. what should humans handle, and can the AI make a smooth hand off?”



# The iceberg problem

A demo shows you the tip. The features that decide real-world performance sit below the waterline.



Below the line

## Demos show the easy part.

Answering, routing and booking — every vendor nails these live.

## The hard 80% stays hidden.

Escalation, QA, conditional logic and support decide real results.

## Make vendors go deep.

Ask them to handle your messiest scenario, not their happy path.

Two vendors can give identical demos and deliver wildly different results. Ask what lives below the line.



## PART TWO

# Write the job description

You can't evaluate a vendor against needs you haven't named. Before you take a single demo, get specific about what's broken, what you need done, and what it's quietly costing you.

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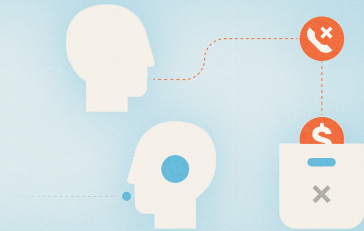
Write the job description

## Identify your pain points

Name what's actually broken. Most firms feel several of these at once.

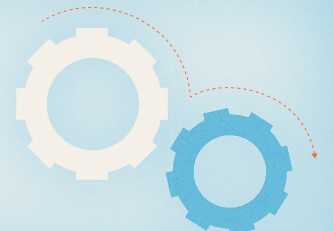
### LOST REVENUE

Are you **missing potential revenue**?



### REDUCED PRODUCTIVITY

Are interruptions **tanking your team's output**?



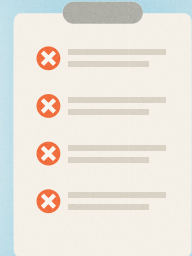
### REPUTATION DAMAGE

Are bad first impressions **hurting your reputation**?



### INCONSISTENT INTAKE

Are you **missing essential lead data**?



### BAD SERVICE

Are you **struggling to return client calls**?



### GROWTH CONSTRAINTS

Are you **unable to scale** if call volume increases?



Circle the ones that sting. That shortlist becomes your jobs to be done.



# The jobs to be done

Turn those pains into outcomes. This is the job description every vendor should be measured against.

## AI Receptionist: **Core responsibilities**

- ✓ **Qualify new inquiries** So only the right leads make it to the next step.
- ✓ **Capture structured intake** Complete and usable on the first pass.
- ✓ **Screen leads consistently** Same questions, every caller, every time.
- ✓ **Reduce interruptions** Protect your team's deep, billable work.
- ✓ **Book appointments** Straight onto the calendar — no phone tag.
- ✓ **Send follow-up materials** Intake links and next steps, automatically.
- ✓ **Block spam & solicitation** Keep junk calls off your team's plate.
- ✓ **Maintain brand professionalism** Every caller hears the same polished firm.
- ✓ **Handle after-hours calls** Coverage when the office is dark.

Write the job description

## Quantify what's at stake

Missed calls feel abstract until you price them. Here's the math — and what it looks like for a real firm.



### A REAL EXAMPLE

A small firm losing three calls a day while everyone's in court:

$$\begin{matrix} \$4,500 & \times & 3 & \times & 35\% & \times & 30\% & \times & 30 & = \\ \text{New-client value} & & \text{Missed calls/day} & & \text{Share from new leads} & & \text{Close rate} & & \text{Days in a month} \end{matrix}$$

ESTIMATED MONTHLY REVENUE LOST

**\$42,525**

per month

**\$1,417.50**

lost every day the phones go uncovered.

That's more than a paralegal's salary walking out the door in calls you never answered.

## PART THREE

# The evaluation framework

Now you talk to vendors, on your terms. Map what the system must connect to, pressure-test every demo, and score each vendor the same way.

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# Map your systems first

Before any demo, document what your AI receptionist must plug into. This list becomes your configuration blueprint.



## Phone system

Your provider — and who actually owns the number.

**⚙️ PIN DOWN:**

- Full port or call forwarding?
- Ringcentral or Dialpad?



## Practice management

Clio, Filevine, Smokeball — and which way the data flows.

**⚙️ PIN DOWN:**

- Read availability, write leads, or both?



## Intake process

Screening questions and qualification thresholds by practice area.

**⚙️ PIN DOWN:**

- Where does your conflict check happen?



## Escalation path

The high-stakes calls a human must take.

**⚙️ PIN DOWN:**

- Who gets the distressed caller at 7pm?

# Evaluate on the four C's

Four dimensions cover what matters — and surface the iceberg's hidden 80%. Score each vendor 0–4; a zero anywhere is a dealbreaker.

## 1 Core capabilities

Does it reliably do your high-value jobs — in messy conditions, not just the demo?

- Conditional logic by practice area
- Routing accuracy across scenarios
- How fast workflows can change

## 2 Caller experience

What it feels like to be a stressed caller reaching your firm.

- Tone that matches your brand
- Handles the unscripted call
- Clean, well-timed escalation

## 3 Customer service

The vendor's ability to build the system and keep improving it.

- Who owns the call flows
- Implementation & testing
- Support depth & responsiveness

## 4 Compliance

For law firms, inseparable from the product itself.

- Data ownership & storage
- Privilege handling
- Retention, exit & contract terms

## Inside the demo

Demos are curated. Your job is to break the script and see what's really there.

### STEP ONE

#### Bring your scenario, not theirs

Ask them to handle a PI client after hours, an existing-client update, and an opposing-counsel callback — then watch the moment a caller goes off-script.

✓ Green flag: they improvise gracefully

### STEP TWO

#### Ask the hard questions

“What happens when the LPMS integration fails? Which callers can't it handle?” The best vendors welcome these — defensiveness is the tell.

✗ Red flag: they get defensive

### STEP THREE

#### Judge their discovery

Do they ask about your practice areas, intake criteria, and conflict checks — or just run through features?

✓ Green flag: they interview you first

The quality of a vendor's discovery predicts the quality of the system they'll build.



# Questions to ask every vendor

Ask all of them the same things. Identical questions are what make a side-by-side comparison possible.

## 1 Core capabilities

- ① How does it execute my specific jobs across different call types?
- ② How does intake logic adapt by practice area and caller?
- ③ How are routing decisions made — and how consistent are they?

## 2 Caller experience

- ① How does it handle distressed or sensitive callers?
- ② What can't the AI handle — and what happens when it can't?
- ③ When and how do calls escalate, and what context passes?

## 3 Customer service

- ① Who builds and maintains the call flows over time?
- ② What does implementation and testing actually look like?
- ③ Dedicated contact, or a shared support queue?

## 4 Compliance

- ① Where is call data stored, and who owns it?
- ② How is privileged information handled during intake?
- ③ What are the contract, billing, and exit terms?

# Score, then decide

Turn four conversations into one clear comparison with a standardized scorecard.



**Same scale, every vendor.**

Score 0-4 on all four C's.



**Define the bands first.**

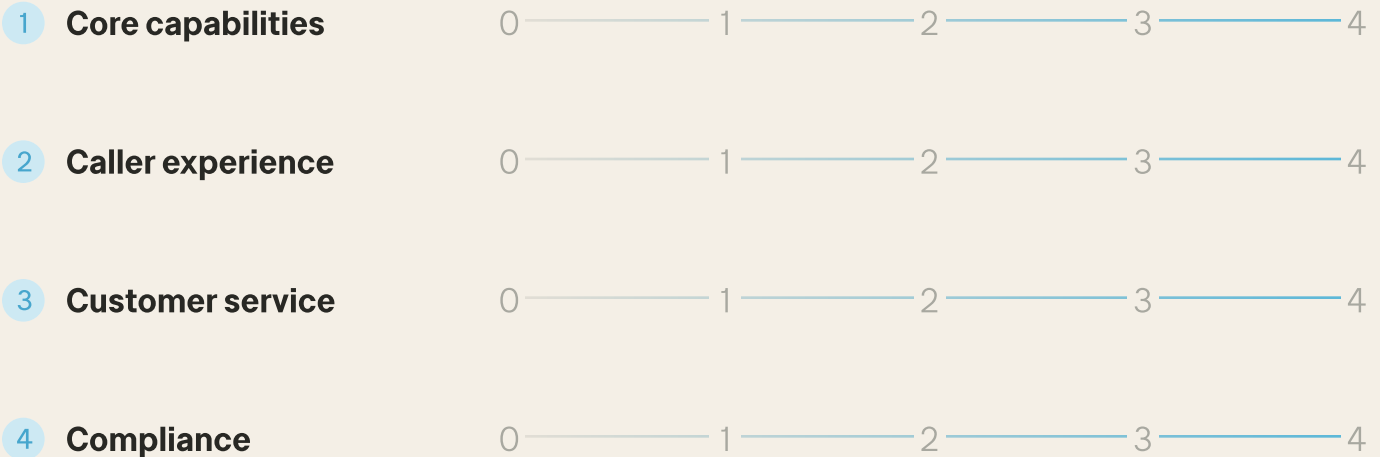
What earns Fair, Good, Excellent.



**A zero overrides the total.**

One dealbreaker fails the vendor.

## VENDOR EVALUATION SCORECARD



Pick the best fit with no unacceptable gaps — not the highest total number.

- ✓ Understand the landscape
- ✓ Write the job description
- ✓ Evaluate partners

YOUR BUYING FRAMEWORK, IN HAND

# Find a partner, not a tool.

You know the tiers, the jobs to be done, and the four C's to score against. When you're ready to see how Smith.ai's AI Receptionists — backed by a network of 500+ North American human agents — handle your firm's real calls, we'll map your requirements to the right solution in one conversation.

[Book a free consultation →](#)