

LAWBROKR x CALLRAIL x LAWMATICS

2026

THE PRE-INTAKE STACK FOR LAW FIRMS

The Legal Intake Report

A Report by Lawbrokr, CallRail & Lawmatics

QUALIFY. TRACK. CONVERT.

The link between clicks, calls, and *retained clients.*

How law firms close the gap between marketing spend and signed cases — with data from **Sullivan Law & Associates.**

85%

CALLRAIL

improvement in call visibility

+25%

LAWBROKR

increase in qualified leads

5–15

LAWMATICS

added clients retained / month

01 THE PROBLEM

WHERE THE FUNNEL LEAKS

The intake funnel leaks in a few predictable places.

Most firms don't have a marketing problem. They have an intake problem. By the time a prospect reaches an attorney, the same handful of gaps have already quietly redirected qualified work elsewhere. The good news: every one of them is fixable, and most firms can close them with tools they likely already use.

01 Form abandonment

Long, generic intake forms ask for too much before showing the firm cares about fit. Most visitors quietly close the tab.

CLOSED BY LAW BROKR

02 Missed calls

Calls that arrive after hours, during conflicts, or in a busy moment hit voicemail, and most of those callers don't leave one.

CLOSED BY CALL RAIL

03 Unqualified leads

Without a filter up front, attorneys spend their time triaging the wrong jurisdictions, wrong case types, and wrong fits.

CLOSED BY LAW BROKR

04 Slow or no follow-up

A reply 24 or 48 hours later is a reply to a lead who already hired someone else. Cold leads rarely warm back up.

CLOSED BY LAW MATICS

05 Poor overall conversion

Every gap prior to this compounds. Marketing spend goes in the front door; a small fraction of it walks out as signed clients.

CLOSED BY ALL THREE

06 No closed-loop ROI

Without retained-client revenue mapped back to source, firms don't know how their marketing efforts performed.

CLOSED BY LAW MATICS

Three platforms, one cohesive funnel.

Each tool owns one stage and hands off with full context. No re-keying. No leads lost between systems.

01 · CAPTURE • Lawbrokr Intake that starts before form fatigue sets in. Storefronts and quiz-style funnels qualify intent in under 90 seconds, so only fit leads reach the firm. › Branded storefront per practice area › Conditional logic asks only what matters › Increases quality and quantity of leads before the CRM › Captures attribution, source and qualification	02 · TRACK • CallRail Attribution, plus an after-hours safety net. Dynamic numbers tie every call back to the campaign that earned it, and AI handles the calls that come in after hours. › Dynamic call tracking by campaign and keyword › Conversation intelligence summarizes and scores intent › 24/7 AI receptionist handles after-hours calls › Closes the loop on which ads drive cases	03 · CONVERT • Lawmatics The platform that turns leads into retained clients. Automated follow-up, e-signature, and intake pipelines, so qualified leads get signed before they shop the next firm. › Automated email & SMS campaigns › Intake pipelines for each practice area › E-sign engagement letters inside the CRM › One record consolidates lead, intake, call & email data
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THE HANDOFF Lawbrokr digitally qualifies, CallRail attributes call source, and Lawmatics converts the lead and ties back to reporting.

How a California family law firm rebuilt intake from the ground up.

[Sullivan Law & Associates](#) is a 6-attorney family law firm with offices in Newport Beach and La Jolla. Before adopting the connected stack, intake ran on paper forms and Excel. They built it in three phases over time, with each platform addressing a specific gap.

6 attorneys · 15–20 staff

Family law · hybrid/remote

Lawbrokr → CallRail → Lawmatics

By stacking these three platforms together, we have *better lead quality, attribution, and organization*. We have a clear understanding of where everything came from and what's working. We are faster, more efficient, and have saved so much time.



Matthew Sullivan

COO · Sullivan Law & Associates · Newport Beach & La Jolla, CA

What each platform unlocked.

Sullivan adopted the stack in three phases. Each platform addressed a specific gap in how the firm captured, converted, or attributed leads.

01 • Lawbrokr

Qualify before intake

Lawbrokr's Storefront captures case details up-front, providing a stronger client experience. Qualified leads land directly in the lead pipeline.

+25%

increase in qualified leads, with zero manual triage.

02 • CallRail

Attribute every call

Self-reporting is now recorded alongside software-based tracking, giving a complete picture of why people are calling — the ad that triggered the call and the client's own perspective.

~85%

improvement in call visibility and source attribution.

03 • Lawmatics

Convert & retain

Replaced ad-hoc tracking with a real CRM. Automated follow-up keeps the firm top-of-mind for months after a consultation, recovering leads that previously went cold.

5–15

new clients retained per month from automated follow-up.

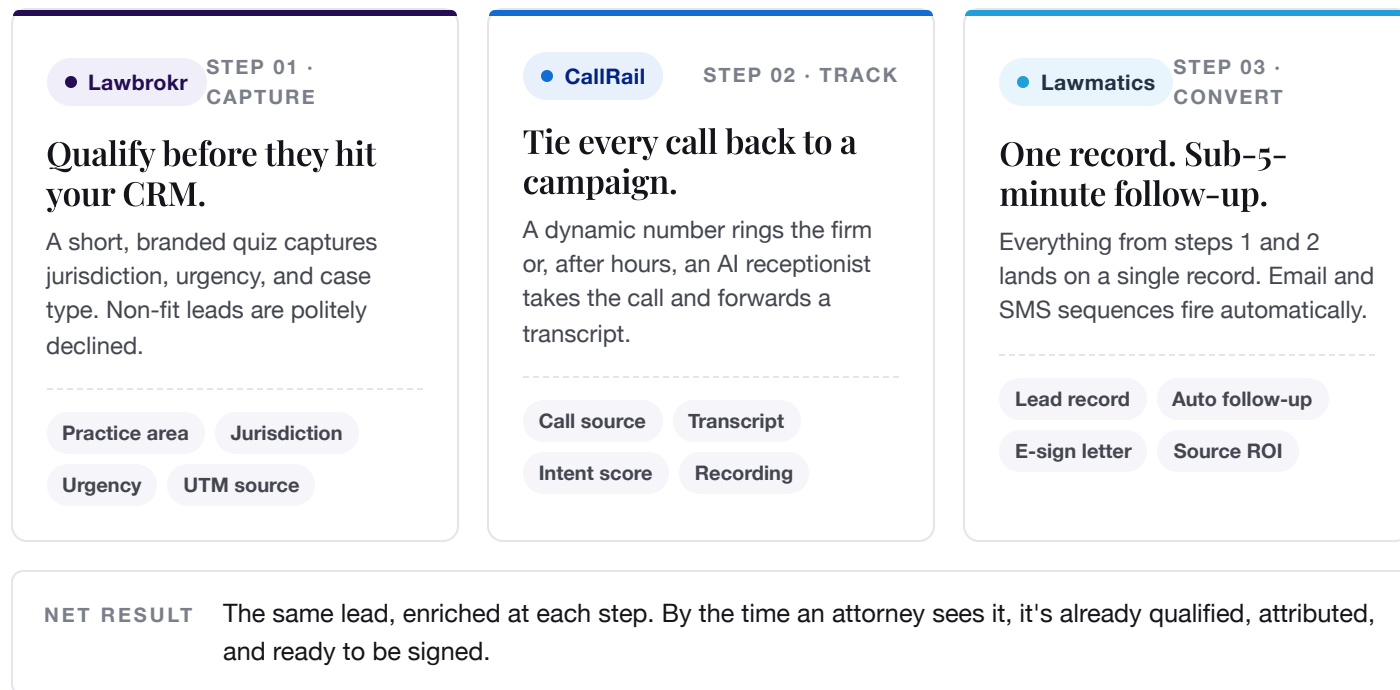
“You need to know where your clients are coming from, and then you need to know how to communicate with those clients and meet them where they are. If you want to be really efficient and not take up a lot of your time, *you've got to look at these platforms.* Otherwise, you're going to be bogged down.”



Matthew Sullivan, COO
Sullivan Law & Associates

One record, passed cleanly between three tools.

What Sullivan Law described is what a connected stack actually does in motion. A real lead picks up data at every stop, so by the time it reaches an attorney, the firm already knows what the case is, where it came from, and what was said.



What a leaky stack actually costs.

The handoff above is what good looks like. When even one piece of it is missing — a CRM with no call tracking, or intake forms with no automated follow-up — the funnel doesn't just slow down. It quietly redirects spend toward channels that aren't working, while the channels that *are* working stay invisible.

● Without the connected stack

- ✗ **Spend you can't trace.** Calls and forms aren't tied back to the campaign that produced them.
- ✗ **Cold after-hours leads.** Voicemails, missed calls, abandoned forms with no recovery loop.
- ✗ **Slow follow-up.** Manual triage leaves qualified leads waiting 24 to 48 hours.
- ✗ **Re-keying and lost context.** Intake admins re-type the same data into two or three systems.
- ✗ **No closed-loop ROI.** You know what you spent. You don't know what it earned.

● With Lawbrokr · CallRail · Lawmatics

- ✓ **Every touch attributed.** Form, call, and chat all push source data into one client record.
- ✓ **24/7 coverage.** CallRail AI catches after-hours calls; Lawbrokr captures off-hours form intent.
- ✓ **Sub-5-minute follow-up.** Lawmatics fires sequences the moment a qualified lead arrives.
- ✓ **One source of truth.** Lead, call, email, and intake data live on one Lawmatics record.
- ✓ **Closed-loop revenue.** Retained-client revenue traces back to the exact campaign that drove it.

IN PRACTICE · SULLIVAN LAW & ASSOCIATES

What the gap was costing them, and what closing it returned.

BEFORE

- Paper intake forms scanned by hand
- Excel spreadsheets for lead tracking
- Almost no follow-up after a consultation
- No way to know which campaigns produced calls

AFTER

- Digital intake that filters before it qualifies
- One client record shared across all three platforms
- Automated follow-up cadences for months after consult
- Every call traced back to its source campaign

An 8-point checklist for a leak-proof intake funnel.

Run through the list. The more boxes you can honestly tick, the less of your marketing spend is leaving the building unattributed.

“An integrated stack is necessary. Without it, I would feel like I have one, if not two, arms tied behind my back.”



Matthew Sullivan, COO
Sullivan Law & Associates

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|--------------------------|--|-----------|
| ☐ | Every marketing channel pushes UTM into a single record
Search, paid, social, and referral all traceable to one CRM record. | ALL THREE |
| ☐ | Inbound calls are tracked back to the campaign that earned them
Dynamic numbers per campaign, keyword, or landing page. | CALLRAIL |
| ☐ | Capture every lead with AI voice assistance and auto SMS messages
No voicemail black holes. AI answers and qualifies missed calls. | CALLRAIL |
| ☐ | Leads are pre-qualified before they reach an attorney
Storefront and quiz logic disqualify non-fit leads early. | LAWBROKR |
| ☐ | Qualified leads are contacted in under 5 minutes
Automated email and SMS sequences fire on lead creation. | LAWMATICS |
| ☐ | Intake pipelines are tied to practice areas
Each practice area has its own stages and follow-up cadence. | LAWMATICS |
| ☐ | Engagement letters are e-signed inside the CRM
No PDF email chains. Signed letter triggers conversion. | LAWMATICS |
| ☐ | Retained-client revenue is mapped back to source
Closed-loop ROI by campaign, channel, and keyword. | ALL THREE |

HOW TO SCORE YOURSELF

0-2	Leaky funnel. Your stack has gaps that are quietly redirecting marketing spend. Start with attribution.	3-5	Partly connected. Closing two or three specific gaps would compound the existing investment.
6-7	Market-ready. You're in the top quartile. Focus on closing the loop on retained-client ROI.	8/8	Best in class. Your funnel is connected end to end. Optimize the cadence and benchmark quarterly.

— THE PLATFORMS

[LEARN MORE](#)

Lawbrokr

CAPTURE & QUALIFY

Lawbrokr is a digital intake platform built to help law firms capture qualified leads before they reach the team, route prospects directly into the right pipeline, and surface the source data behind every conversion.

[Learn more about Lawbrokr →](#)

CallRail

TRACK & COVER

CallRail is a lead intelligence platform built to help law firms attract more qualified leads, understand which marketing campaigns drive high-value cases, and ensure every potential client call gets answered. Start your free two week trial.

[Learn more about CallRail →](#)

Lawmatics

CONVERT & RETAIN

Lawmatics is a legal CRM and growth platform built to help law firms automate client follow-up, run intake pipelines across practice areas, and tie retained-client revenue back to the marketing that produced it.

[Learn more about Lawmatics →](#)
