THE QUIET PROTOCOL

Family Law Consult Screening Checklist

A free consult-screening checklist for family-law firms that need cleaner fit qualification, better conflict-aware notes, and stronger next-step booking.

Family-law attorneys, intake teams, legal admins, and office managers

GUIDE

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WHAT THIS ASSET COVERS

- A first-call checklist for matter type, timing, urgency, and representation status
- Prompts for conflict-aware note handling and fit signals
- A structure for consult booking versus non-fit routing

USE THIS WHEN

1. Consult quality varies by who answers the phone
2. The firm gets many emotionally urgent but poorly documented inquiries
3. Lawyers need cleaner first-contact notes before review

WORKING ASSET

CONFIRM

- caller name
- matter type
- urgency
- representation status
- best callback number

CLARIFY FIT

- deadlines or court dates
- parties involved
- conflict-sensitive notes

ROUTE

- consult booking
- request more detail
- not a fit

This is an intake workflow, not legal advice.

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Family Law Consult Screening Checklist" become shared but unmanaged work.
- Use it with family-law attorneys, intake teams, legal admins, and office managers in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

BEST DEPLOYMENT SEQUENCE

- Consult quality varies by who answers the phone
- The firm gets many emotionally urgent but poorly documented inquiries
- Lawyers need cleaner first-contact notes before review

WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A first-call checklist for matter type, timing, urgency, and representation status, Prompts for conflict-aware note handling and fit signals, A structure for consult booking versus non-fit routing.

- A built-in review cadence so the document becomes part of operations rather than a one-time download.