

Professional Intake Authority Kit

A starter kit for personal injury, bookkeeping, and other professional-service firms that want cleaner intake, stronger onboarding, and more confident first impressions.

Legal, accounting, and professional-service owners, intake teams, and admins

GUIDE

A starter kit for personal injury, bookkeeping, and other professional-service firms that want cleaner intake, stronger onboarding, and more confident first impressions.

WHAT THIS ASSET COVERS

- Personal Injury Intake Qualification Checklist
- Bookkeeping Client Onboarding Checklist
- Owner-Operator Weekly Dashboard Template
- Service Business Lead Handoff SOP

SUGGESTED ROLLOUT

1. Standardize qualification for higher-value inquiries before the handoff gets messy.
2. Tighten onboarding so sold clients and signed matters start with more confidence.
3. Use a weekly dashboard to keep leadership aligned on front-door and delivery health.
4. Clean up handoff notes so qualified demand does not lose momentum internally.

WORKING ASSET

Includes:

- Personal Injury Intake Qualification Checklist
- Bookkeeping Client Onboarding Checklist
- Owner-Operator Weekly Dashboard Template

- Service Business Lead Handoff SOP

USE THIS KIT TO

- strengthen first impressions
- improve qualification and onboarding
- reduce internal handoff friction

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Professional Intake Authority Kit" become shared but unmanaged work.
- Use it with legal, accounting, and professional-service owners, intake teams, and admins 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.

30-DAY ROLLOUT SEQUENCE

- Standardize qualification for higher-value inquiries before the handoff gets messy.
- Tighten onboarding so sold clients and signed matters start with more confidence.
- Use a weekly dashboard to keep leadership aligned on front-door and delivery health.
- Clean up handoff notes so qualified demand does not lose momentum internally.

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: Personal Injury Intake Qualification Checklist, Bookkeeping Client Onboarding Checklist, Owner-Operator Weekly Dashboard Template, and more.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.