

Pipeline Revenue Leak Audit

HIRING & EMPOWERING

Find where your firm is losing revenue — and what to fix first.

Your next \$25,000 already exists inside your CRM.

Answer the 9 questions below. Score each gap. Then take action — this week.

GAP 1

Current Pipeline | Most Recent Leads

- | | | |
|---|------------------------------------|-----------------------------------|
| ☐ Does your firm respond to every new inquiry within 5 minutes? | <input type="button" value="Yes"/> | <input type="button" value="No"/> |
| ☐ Do you have a 3-touch callback sequence (call + text + email) within 24 hours? | <input type="button" value="Yes"/> | <input type="button" value="No"/> |
| ☐ Is there a named owner assigned to every unconverted lead with a follow-up deadline? | <input type="button" value="Yes"/> | <input type="button" value="No"/> |

GAP 2

Back From the Dead | Cold Lead Re-Engagement

- | | | |
|---|------------------------------------|-----------------------------------|
| ☐ Have you audited your last 90 days of unconverted leads and sent re-engagement outreach? | <input type="button" value="Yes"/> | <input type="button" value="No"/> |
| ☐ Do cold leads receive a personal, situation-specific message — not a form email — every 45 days? | <input type="button" value="Yes"/> | <input type="button" value="No"/> |
| ☐ Is there a documented re-engagement protocol with a named owner running it? | <input type="button" value="Yes"/> | <input type="button" value="No"/> |

GAP 3

Client Care Calls | Past Clients & Referrals

- | | | |
|--|------------------------------------|-----------------------------------|
| ☐ Do you proactively contact past clients every 90 days — not to sell, but to check in? | <input type="button" value="Yes"/> | <input type="button" value="No"/> |
| ☐ Is there a named team member responsible for client care outreach and referral follow-up? | <input type="button" value="Yes"/> | <input type="button" value="No"/> |
| ☐ Do you track re-engagement activity (calls made, contacts reached, revenue recovered) weekly? | <input type="button" value="Yes"/> | <input type="button" value="No"/> |

TOTAL YES ANSWERS:

Gap 1 ___/3

Gap 2 ___/3

Gap 3 ___/3

Score Your Results

8–9 YES

SOLID SYSTEMS

You're ahead of most firms. Tighten the last gaps by assigning a named owner to each open item and reviewing pipeline activity weekly. Even one recovered lead pays for the work.

5–7 YES

REAL REVENUE LEAKING

You have a system, but it has holes. Each "No" above is a lead who came to you and fell through the cracks. Fix the gaps. No new marketing needed.

0–4 YES

CRITICAL — ACT NOW

Leads are coming in. Consults are happening. But execution gaps are costing you \$25K–\$75K+ right now. Start with Gap 1: speed-to-lead and the 3-touch callback sequence. Everything else compounds from there.

HOW ELITE LAW FIRMS CLOSE THESE GAPS

- ✓ 5-minute standard response time
- ✓ 3-touch callback: call + text + email within 24 hrs
- ✓ Named owner assigned to every unconverted lead

GAP 1

- ✓ 90-day CRM audit of cold leads — now
- ✓ Personal re-engagement message every 45 days
- ✓ Documented re-engagement protocol with owner

GAP 2

- ✓ Proactive past-client care calls every 90 days
- ✓ Named team member owns referral follow-up
- ✓ Weekly tracking: calls made, contacts reached, revenue recovered

GAP 3

Ready to take the next step?

Book a free Clarity Call with Molly McGrath and we'll map your exact next steps.

hiringandempowering.com/clarity-call