

INTAKE GUIDE

Building intake scripts that *are human*

Create a legal intake script that builds
trust with personal injury clients



LEX^{Reception}

Keep law *human*

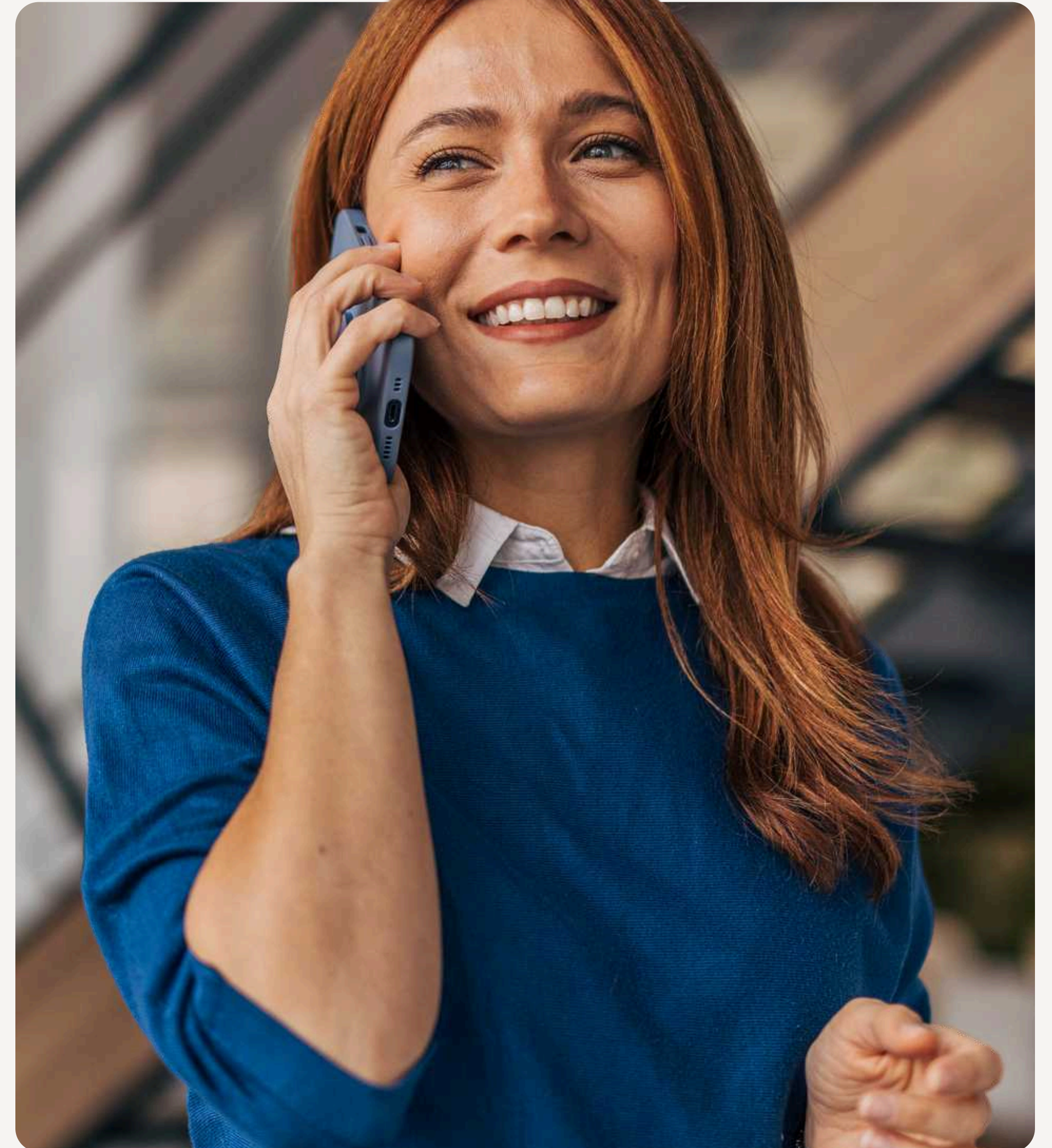
Always lead with *empathy*

The first 90 seconds shape a client's legal journey.

Ask for the caller's name: "I'd be happy to help. May I ask who's calling?" This simple step conveys that a real person is listening.

76% of people choose firms with human receptionists

OnePoll Survey | October 2025 | 6,000 Respondents





BUILD CLIENT TRUST

1 in 3 legal calls
arrive outside
of standard
business hours

LEX Reception Internal Data 2025

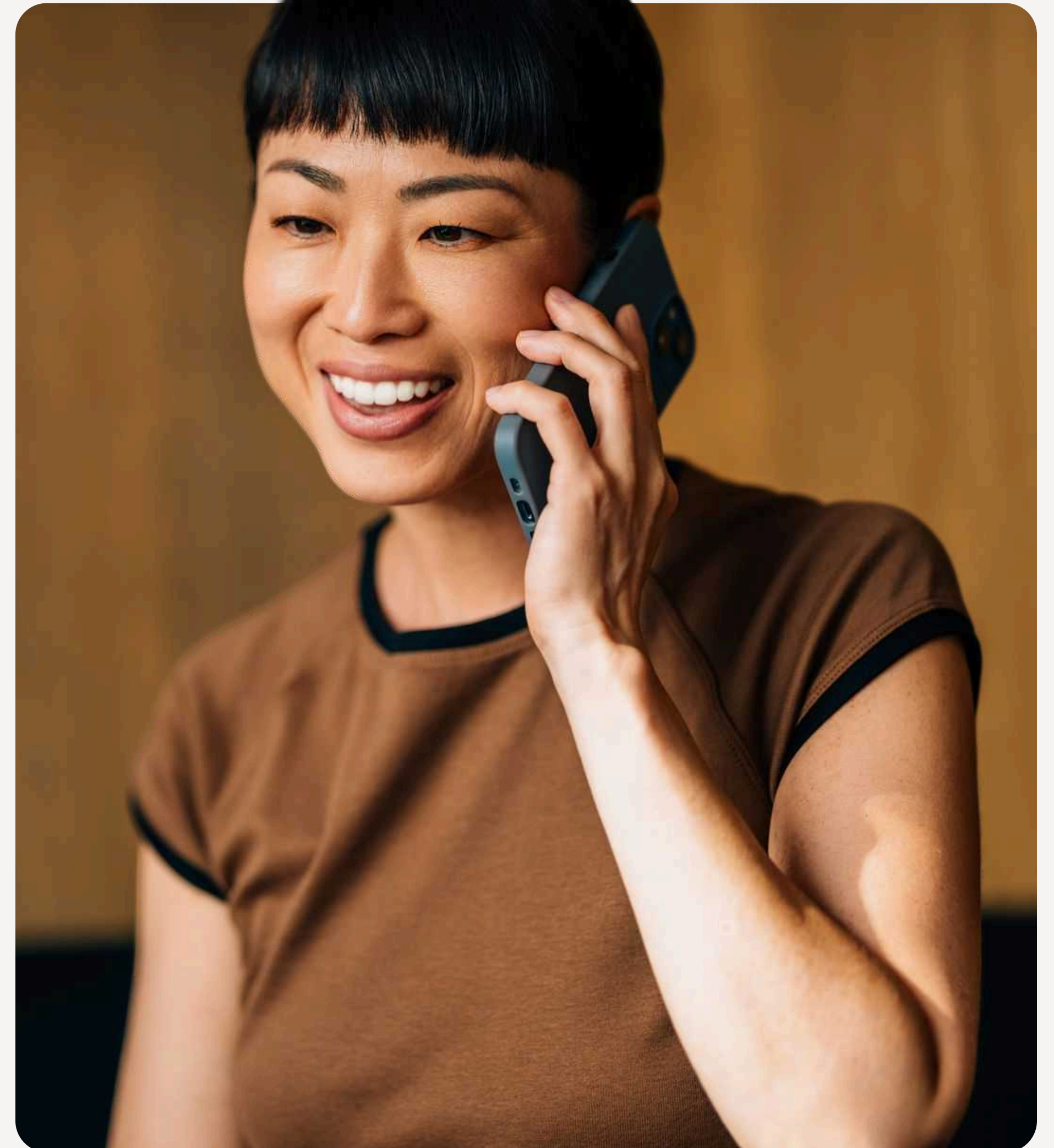
Treat every caller as *an individual*

One script, many pathways, different needs.

Calling an attorney can feel intimidating for new clients. But when an adjuster calls, they are usually seeking information. You should map out different paths for each type of caller, so you minimize risk while making new clients feel comfortable.

87% bypass chatbots for real people

OnePoll Survey | October 2025 | 6,000 Respondents





UNDERSTAND THE RELATIONSHIP

“Are you calling for
yourself, *or on behalf*
of someone else?”

Suffering a personal injury can be a difficult time. Often, a spouse, parent, or friend will call on behalf of the injured person. Understand their relationship and get to know the person calling.

Genuinely care about the *incident*

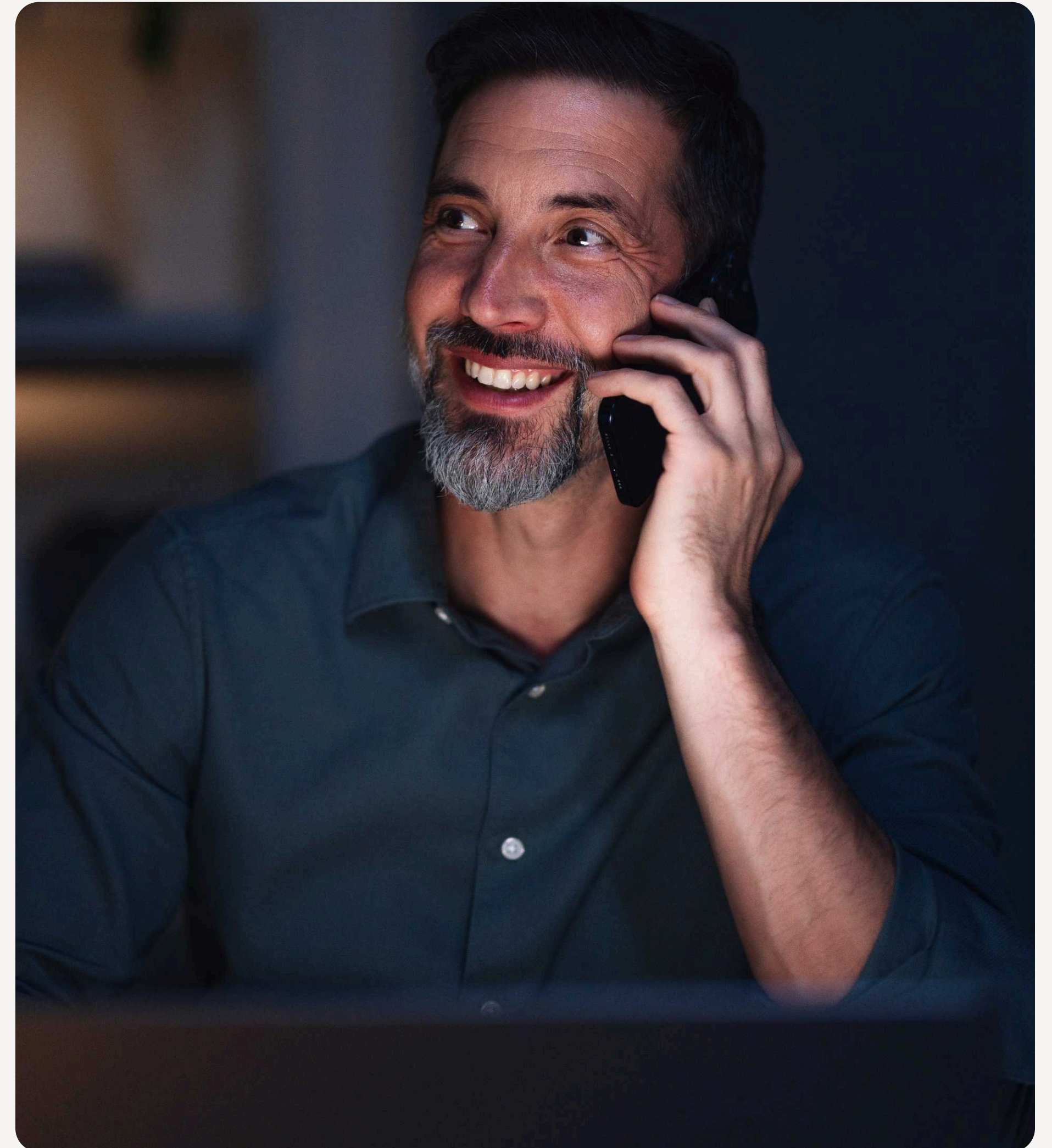
Learn about the incident and the impact.

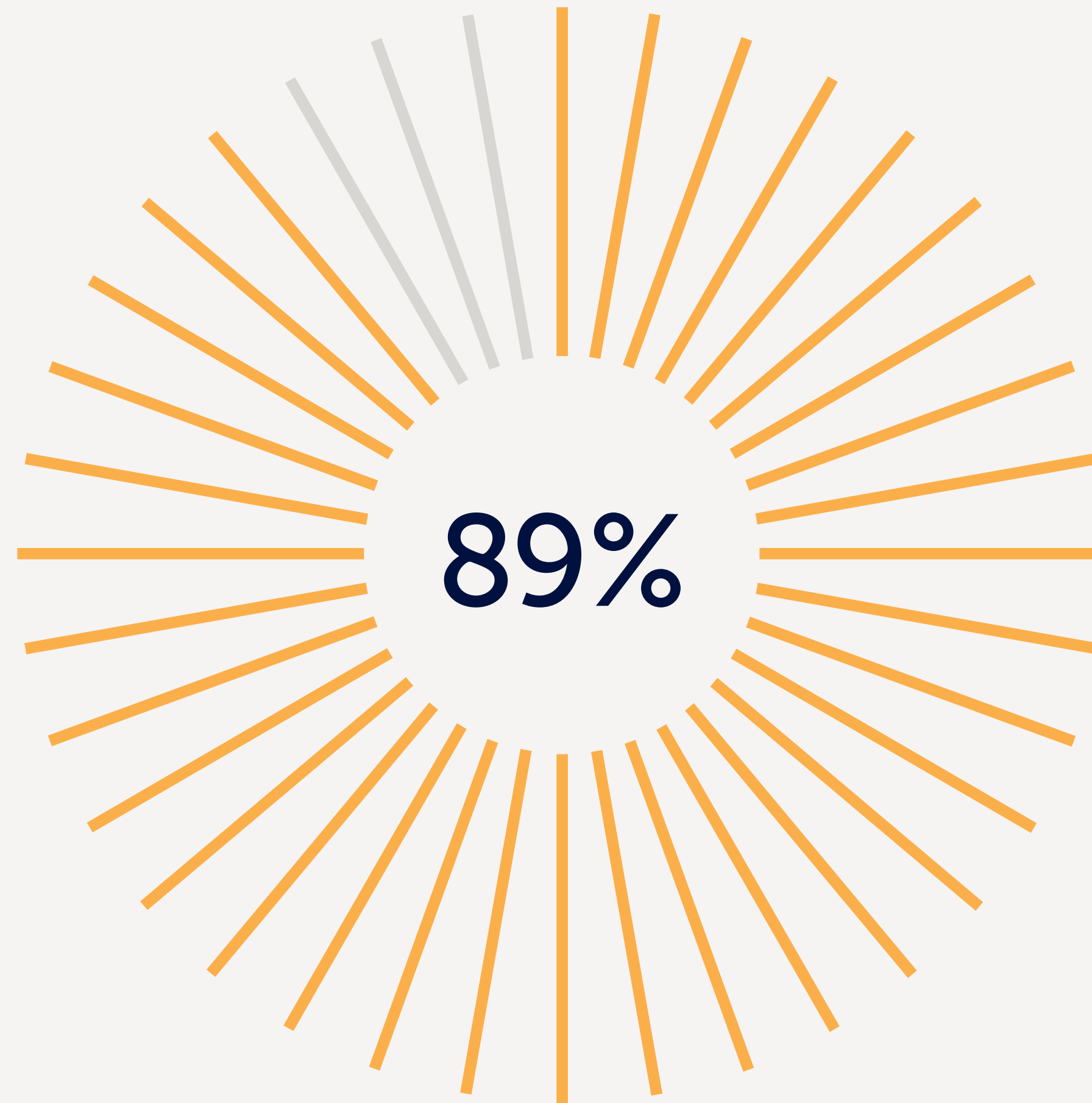
Understanding what happened and the injury type is essential, but caring about the impact on the person builds trust and confidence. Make them feel heard.

61%

believe humans understand their
concerns better than AI

OnePoll Survey | October 2025 | 6,000 Respondents





of legal clients
want to speak
to a *real person*

OnePoll Survey Results

OnePoll Survey | April 2026 | 6,000 Respondents

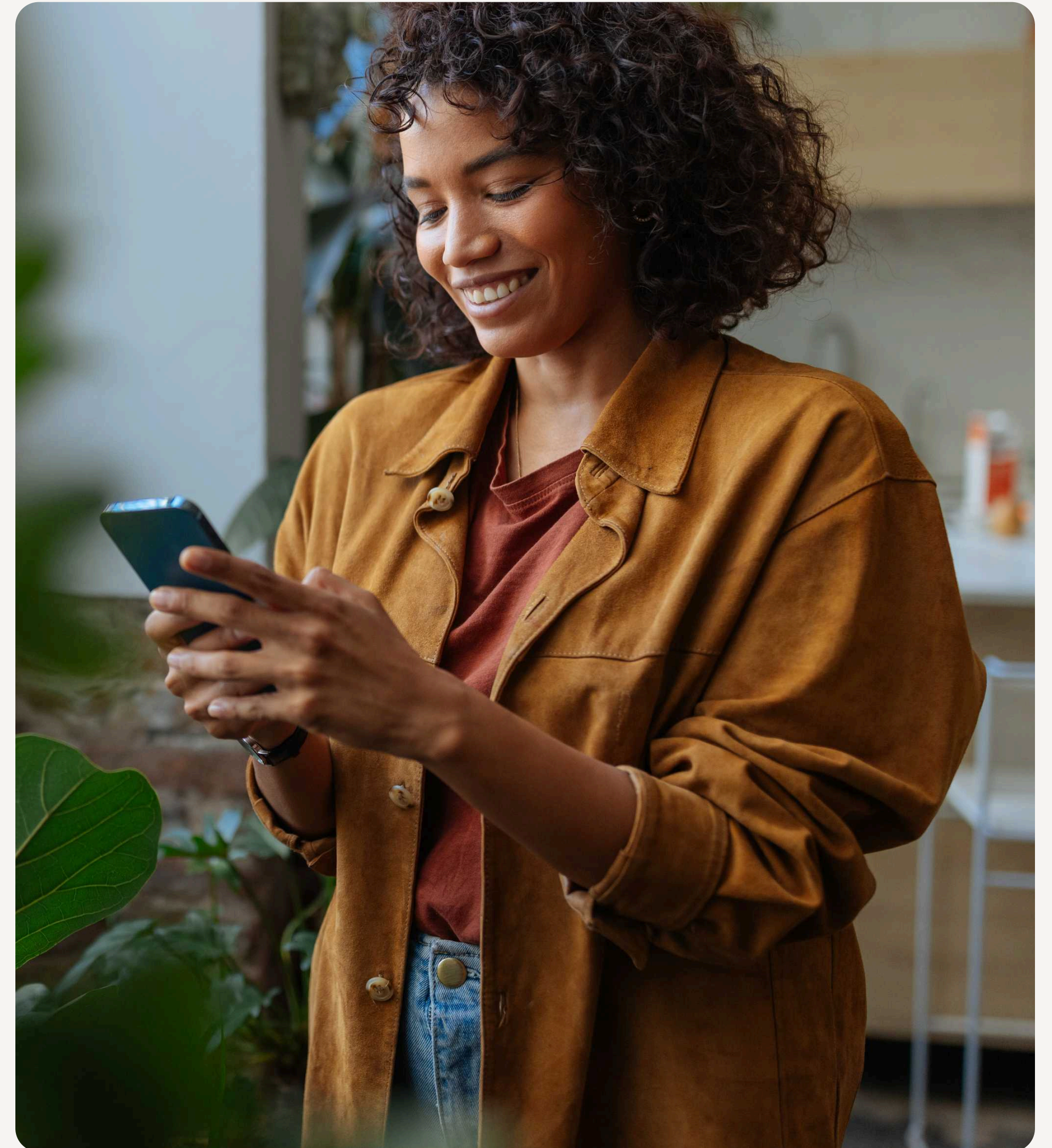
Transfer calls *thoughtfully*

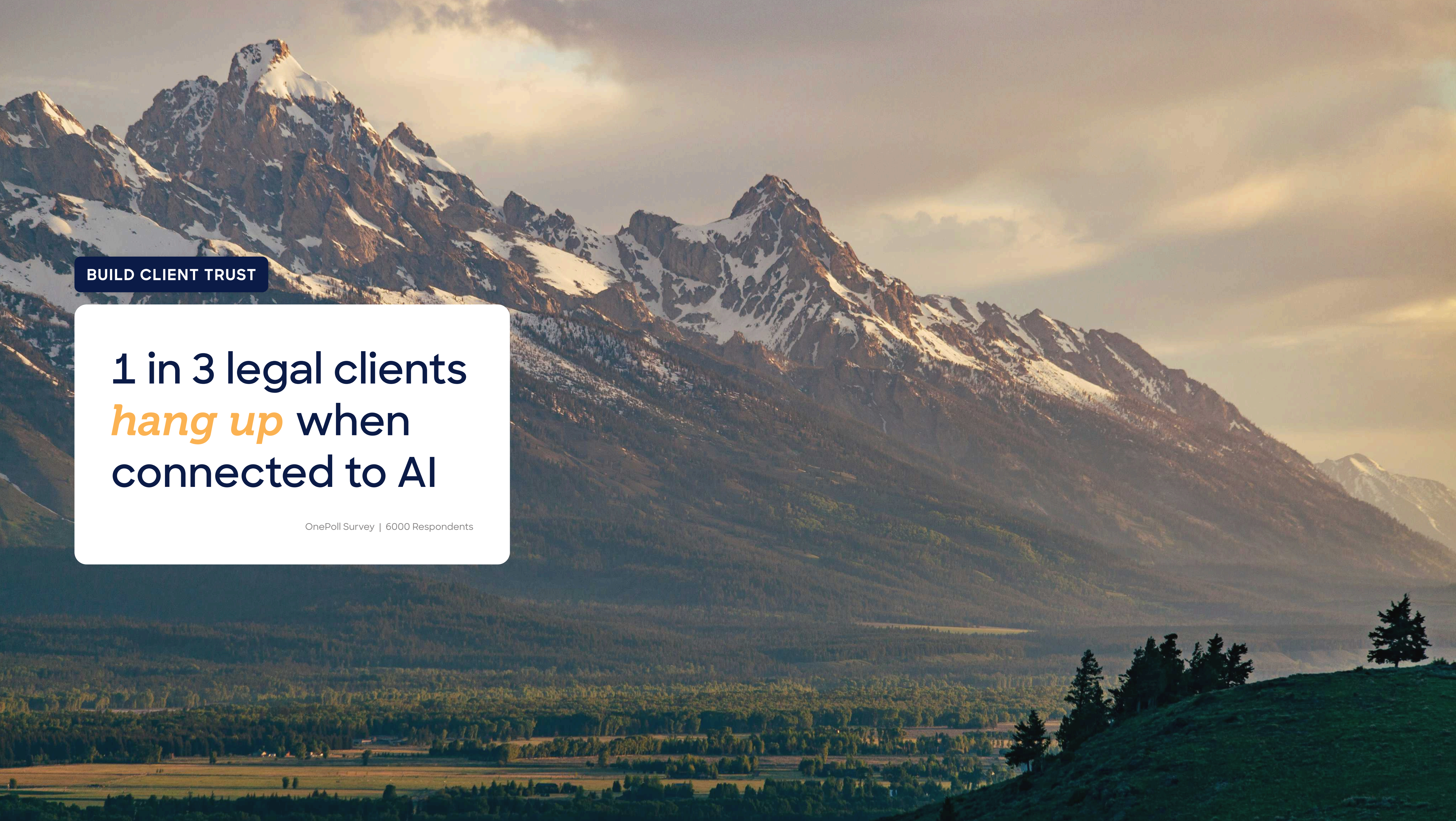
Be intentional with each type of call.

Court calls and opposing counsel require speed and urgency, while new clients need qualification with care. Distinguish between these calls and route each accordingly.

58% of callers believe removing humans
makes service worse

OnePoll Survey | October 2025 | 6,000 Respondents





BUILD CLIENT TRUST

1 in 3 legal clients
hang up when
connected to AI

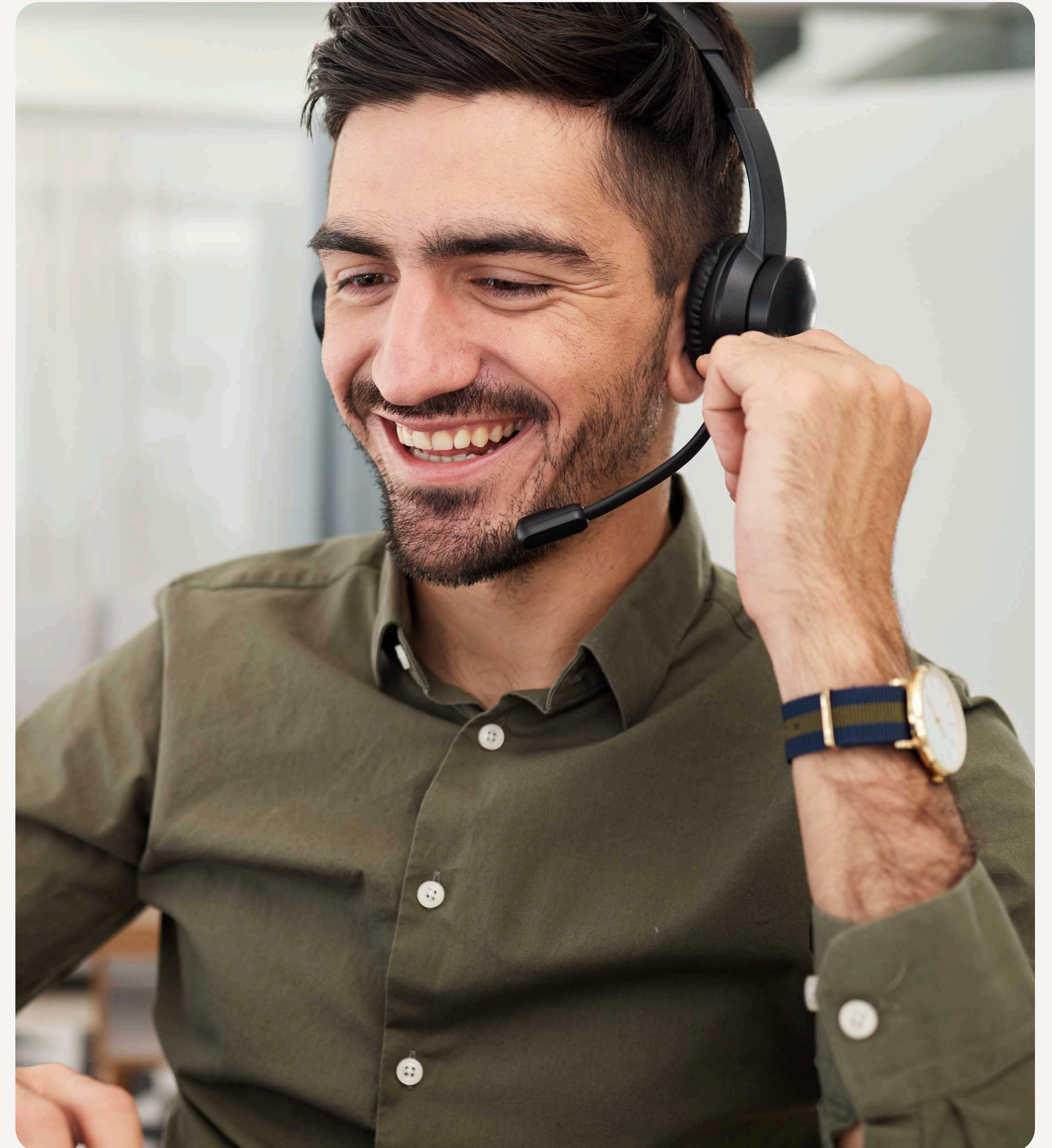
OnePoll Survey | 6000 Respondents

Leave a lasting *impression*

Your callers should feel confidence in your firm.

When a receptionist closes a call using the attorney's first name, the firm's name, and a clearly outlined next step, the caller feels confident in your firm.

53% feel human representatives provide more complete explanations



Personal injury intake *checklist*

Add care to each caller's journey

Lead with empathy

1

Understand relationships

2

Care about the incident

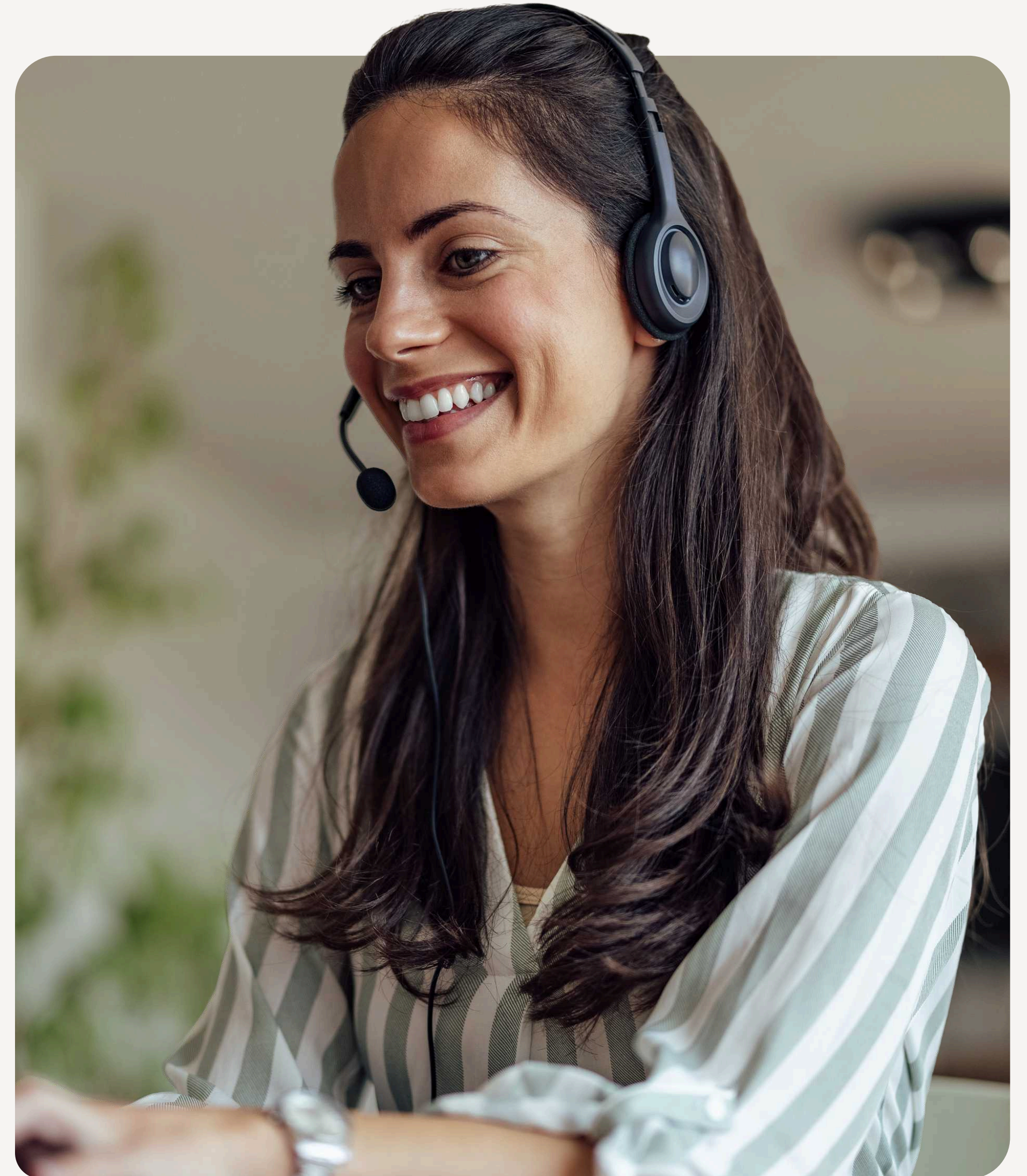
3

Be thoughtful with transfers

4

Close with intention

5



Build your script *with LEX*

Strong relationships grow your firm

LEX Reception keeps your law firm human. With 24/7 legal receptionist services, you can intake faster, rank higher, win more, and lawyer better.

1

Share key details about *your firm*

We learn your practice area, your firm’s culture, and the names of the attorneys your callers will be connected with.

2

Tailor *your script*

We build a custom script with built-in routing logic, incident type categories, and your attorneys’ names from the start.

3

Real people, *real legal care*

Our trained receptionists handle every call using that script, every hour, every day.

Keep law *human*

Real people answer your firm's calls, 24/7.

-  24/7 legal intake
-  Appointment scheduling
-  Bilingual support
-  After hours