

Ask your intake vendor. Then ask us.

Your intake system talks to prospective clients before you do. Everything it says is said in your name. Here is what to ask before you sign anything — including with us.

We answer all twelve in writing. See who else will.

Twelve questions

Send them to whoever handles your intake today. Send them to us. Compare what comes back.

01 Do you ever contact someone who didn't contact us first?

WHAT YOU'LL HEAR

"Only warm leads."

Outbound calling and texting is a standard feature. "Warm" is a marketing word, not a legal category.

WHAT WE DO

Never. No cold outbound, no solicitation in your name, no exceptions. We only answer contact your marketing generated.

Every rule that matters turns on who reached out first. Get it wrong and you're not arguing about a refund.

02 Is this lead going to any other firm?

WHAT YOU'LL HEAR

"Exclusive in your market."

Ask what happens to the ones you decline.

WHAT WE DO

We don't source, buy, resell or share leads. There is no pool. There is no second firm.

A prospective client is owed confidentiality from the first word — before you've signed anything, before you've said a word back.

03 When does the caller find out they're talking to AI?

WHAT YOU'LL HEAR

"It introduces itself as a virtual assistant."

To your caller, that's a person. That's worse, not better.

WHAT WE DO

Voice, SMS and web chat — all three. It re-discloses on a new session, on handoff to a human, and on handoff back.

Ask whether the disclosure is built into the system or just something the model was told to say. Only one of those survives a deposition.

04 Does it give recording notice at the top of every call?

WHAT YOU'LL HEAR

"It's in our terms of service."

Your caller didn't read your vendor's terms. Recording ships on by default. Notice does not.

WHAT WE DO

Notice at call open, configured by state.

▲ DRAFT — HOLD UNTIL MU CONFIRMS

In California, Florida, Pennsylvania, Washington, Illinois and others, everyone on the call has to agree.

05 Can it tell a caller they have a good case?

WHAT YOU'LL HEAR

"It's trained on your firm's expertise." That's a description of the risk, not a control.

WHAT WE DO

It qualifies. It never evaluates. No merit, no case value, no fee quotes, no deadlines.

A caller told they're inside the deadline who isn't just relied on you. Your carrier will ask who said it.

06 How much do you collect before running conflicts?

WHAT YOU'LL HEAR

Usually a blank look.

Tools are built to capture rich detail up front. Nobody asks what that detail costs you.

WHAT WE DO

We screen before we take the story.

▲ DRAFT — CONFIRM BEHAVIOR + KATHRYN REVIEW

Hear enough about a case and you can be disqualified from taking the other side of it. On employment work, where the same defendants keep coming back, that is not hypothetical.

07 Are our intake transcripts training your model?

WHAT YOU'LL HEAR

"We take security very seriously."

Ask for the subprocessor list. See what comes back.

WHAT WE DO

Stated retention and training terms, in the contract.

▲ DRAFT — CONFIRM RETELL + PL TERMS

Your prospective clients' worst days, uploaded into somebody's training set.

08 Is our firm registered with the carriers under our own EIN?

WHAT YOU'LL HEAR

"You don't need to worry about that."

You're a firm that files these cases. You do.

WHAT WE DO

Own EIN, own legal name, filed the day you sign — not the day we start. T-Mobile and Verizon clear in about a week.

AT&T is a manual review that takes two to four weeks and nobody can speed it up. Voice is live in 48 hours either way.

Everyone else either hides that gap or routes around it. We schedule around it and tell you the date.

09 What time can it text, and whose clock?

WHAT YOU'LL HEAR

Server time, usually.

Which means it eventually texts someone at 11pm.

WHAT WE DO

Recipient's local time, with opt-out honored across every channel.

▲ DRAFT — PENDING MU

Eight to nine, in your caller's zone. And that caller might practice on the other side.

10 If we leave, do we keep the number and the transcripts?

WHAT YOU'LL HEAR

Anything other than yes.

A firm that can't take its intake number with it can't actually leave.

WHAT WE DO

Your number ports. Your transcripts export.

▲ DRAFT — CONFIRM CONTRACT TERMS

Those conversations are part of the file. That obligation doesn't disappear because the records sit in a vendor's database.

11 Am I paying you for the lead, or for the work?

WHAT YOU'LL HEAR

Per lead delivered.

Which is a different thing, under a different rule.

WHAT WE DO

For the work, on calls your own marketing generated. We never source the lead, so there's nothing to pay us a finder's fee for.

▲ DRAFT — BRIAN SIGN-OFF REQUIRED

Your vendor should be able to explain which one they are without checking with anyone.

12 Are you guaranteeing results?

WHAT YOU'LL HEAR

"We'll get you X cases a month."

Repeat that in your own marketing and it's yours now.

WHAT WE DO

No. We had a \$1M guarantee. We took it down. Now we run a Pipeline Audit and show you what's leaking before you pay us anything.

A vendor comfortable guaranteeing your outcomes is a vendor comfortable with your bar complaint.

Send all twelve. Ask for it in writing.

Send this list to whoever handles your intake today, and send it to us. Compare what comes back — that comparison is the whole point.

[Get the Pipeline Audit](#)

These questions track ABA Model Rules 1.6, 1.18, 5.3, 5.4, 5.5, 7.1, 7.2(b), 7.3 and 8.4(a), the TCPA, and ABA Formal Opinion 512. The left column describes sales responses commonly encountered across the category; it is not a statement about any identified provider. Reviewed by Brian Heller, PipelineLift Founding Legal Advisory Council. Not legal advice — state rules vary.