

THE CASE FOR GROWTH

Lead Conversion Playbook

Step-by-step framework to convert consultations into retained clients

thecaseforgrowth.com

The Consultation Framework

Most consultations fail because lawyers focus on demonstrating expertise rather than building trust and solving problems.

The truth: Clients hire lawyers they trust, not necessarily the smartest lawyer in the room.

This playbook provides a proven framework that converts 60%+ of qualified consultations into retained clients.

The 5-Phase Framework

- 1. Pre-Consultation:** Set expectations before they arrive
- 2. Build Rapport:** First 5 minutes set the tone
- 3. Diagnose:** Understand their situation deeply
- 4. Present Solution:** Show clear path forward
- 5. Close:** Make next steps easy and clear

Phase 1: Pre-Consultation

Before the consultation:

- Send confirmation email with what to bring
- Review any information they provided
- Research their situation if needed
- Prepare specific questions
- Block 60 minutes (consult + notes)

Why this works: Sets professional tone, shows you're prepared, manages expectations.

Phase 2: Build Rapport

The first 5 minutes determine whether they'll hire you.

Do this:

- Warm greeting with smile
- Offer beverage
- Small talk (1-2 minutes max)
- Thank them for coming
- Acknowledge their situation

Key principle: They need to feel heard before they'll hear you.

The Close

After presenting your solution:

Make next steps crystal clear and easy to follow.

Common objections and responses:

- Need to think: Ask what specific concerns they want to think through
- Cost question: Be clear and confident about investment
- Shopping around: Ask what's most important in choosing the right lawyer

Want help improving your consultation conversion rate?

Get personalized coaching on converting more consultations.

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