



## RED POINT INTAKE FORM



# WELCOME

Welcome to your Red Point  
Intake Sheet from Ascent.Legal

I carefully crafted this sheet  
using proven behavioral  
psychology triggers and used this  
exact process to personally close  
over 18,000 leads for my clients  
over the phone.

You can see the full video tutorial  
on how to use this sheet at  
[ascent.legal/redpoint](http://ascent.legal/redpoint)

You've made a great decision for  
your practice and please let us  
know how it works for you by  
emailing our team at:

**HELLO@ASCENT.LEGAL**



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Here's the deal we'll make with you... we're going to give you the best chance at closing your legal leads we can. In short, we can't promise or guarantee any specific results for you.

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## STEP 1: ANSWERING THE CALL

Attorney: My name is \_\_\_\_\_ and who am I speaking with?

Caller: This is John and I was charged with drunk driving.

## STEP 2: OPENING THE CALL

Attorney: I am so sorry to hear that John, but you've made a great decision in calling me.

You see I've handled over \_\_\_\_\_ DWI cases and that means I have the experience to be able to help you during this tough time.

Now to better understand where you stand and determine if I can take on your case is it ok if I ask you a few questions?

This is just by the way between you and me....

# STEP 3: GATHER BASIC INFORMATION

What is your legal name?

*(have them spell it)*

What is your cell phone? Home phone?

What is your date of birth?

What is your email address?

What court are you charged in?

What date and time do you have to appear?

When were you arrested, date and time?

# STEP 4: GATHER INFORMATION ABOUT THE CASE

Why were you stopped by the police? Or how did they engage you?

What did they say to you when they approached your vehicle?

Did you make any statements to the officer?

Did you take any Field Sobriety Tests? If yes which ones?

**\*Pro Tip:** Be sure to ask follow up questions here. Get specifics.

*In addition to gathering important information, you also want the caller to "relive" the moment of arrest.*

*This will create an emotional response that will help position you as the solution to their predicament.*

Did you take a PBT test?

Did the officer read you the Miranda Warnings/rights? If so, when?

Were you handcuffed?

What happened to your car?

Did you take a chemical test? If yes, did the officer tell you the reading?

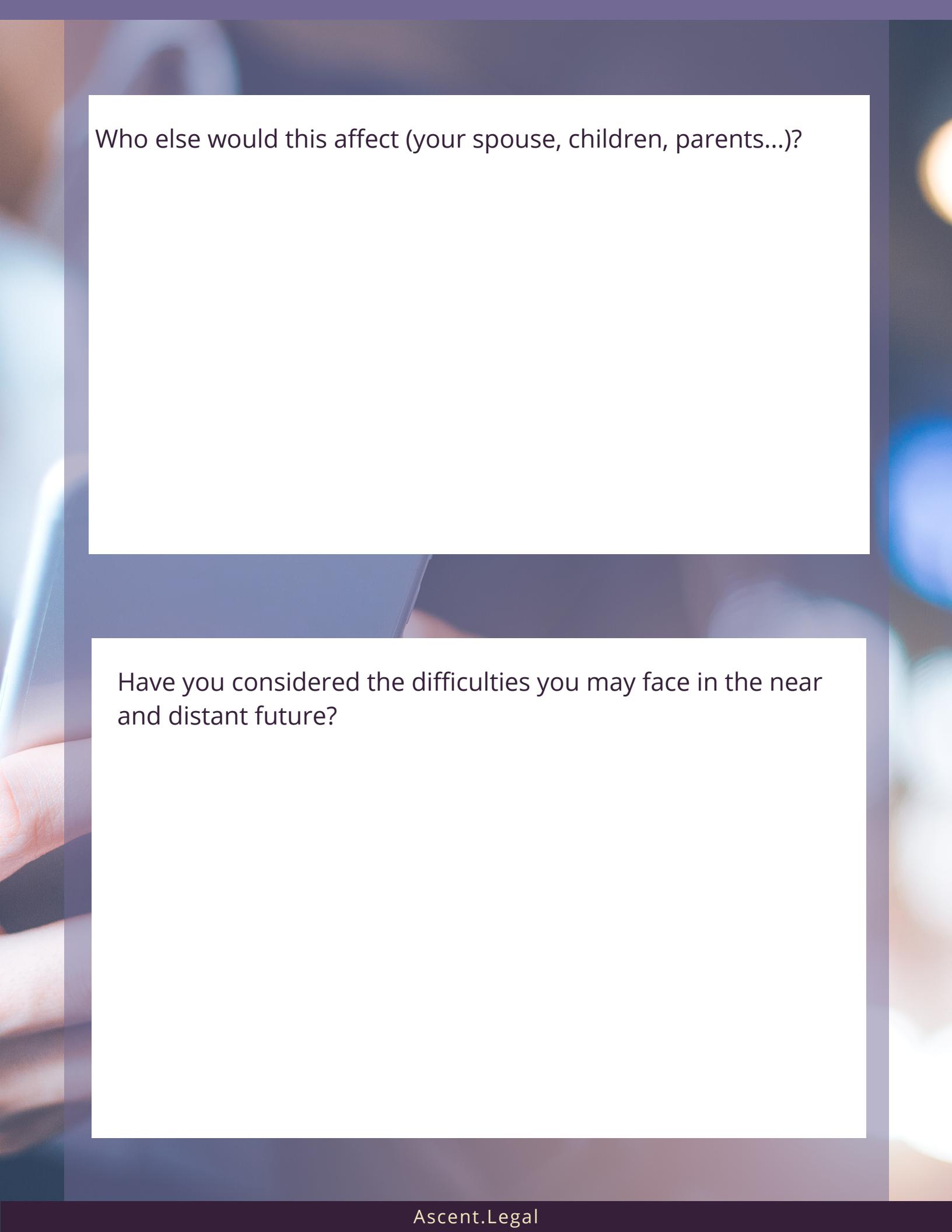
When were you released?

# STEP 5: DISCOVER THE CONSEQUENCES

What do you do professionally?

What would your employer do if they knew about your arrest and charges?

Do you know if this is something that can affect or hurt your standard of living?



Who else would this affect (your spouse, children, parents...)?

Have you considered the difficulties you may face in the near and distant future?

# STEP 6: TRANSITION TO YOUR SOLUTIONS

*"Thank you for sharing all of that with me I know it's a tough conversation to have but it's needed in order for me to assess what's in jeopardy legally and also personally for you."*

***At this point, the caller is acutely aware of the costs associated with this arrest (financial, emotional, relationships, etc.). Now you can share with them the next steps in the process.***

***See Ascent.Legal's guide: 10 Mistakes Lawyers Make While Closing Leads on the Phone for tips on this part of the process.***



# THANK YOU!

If you'd like further support closing your legal leads, reach out to our team at:

**HELLO@ASCENT.LEGAL**