

HELPING CONNECTIONS HAPPEN.

LEGAL & PROFESSIONAL SERVICES

Every intake captured. Every case qualified. Every consult booked.

**100%** of inquiries qualified. **45%** conflict-checked, calendar ready. AI handles the intake gauntlet so your attorneys spend time on cases not on calls. **2.1x** signed retainers per month.

CONTENTS

# Six systems, tuned for legal & professional serv

- 
- 01**    **Voice AI intake specialist**  
*Screens, conflict-checks, and books — confidentially.*
- 
- 02**    **Case-qualification chatbot**  
*Static intake forms, replaced.*
- 
- 03**    **Practice-area SEO, AEO & legal FAQ schema**  
*Be the firm AI engines cite.*
- 
- 04**    **'The Counsel' podcast**  
*Plain-English legal explainers — credibility on tap.*
- 
- 05**    **Digital avatar of the founding attorney**  
*A warm, human intro before the first call.*
- 
- 06**    **Agentic AI matter coordinator**  
*Intake -> conflict check -> engagement letter -> calendar.*
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# 01

## Voice AI intake specialist

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*Screens, conflict-checks, and books — confidentially.*

### THE PLAY

Every inbound call is greeted by an AI intake specialist trained on your practice areas. It captures the case facts, runs a conflict check against Clio, and only books consults that fit your case criteria. Microsoft 365 archives the call, HubSpot or Salesforce captures the lead, and Slack pings the attorney on a qualified match.

### PLAYS WELL WITH

Clio Grow

MyCase

PracticePanther

Lawmatics

Smokeball

### OUTCOME

**Only qualified consults make it to your calendar.**

# 02

## Case-qualification chatbot

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*Static intake forms, replaced.*

### THE PLAY

A conversational intake on your site asks the right questions for each practice area (PI, family, estate, IP), collects documents securely, and schedules the consult — all while you sleep. Conversations route to HubSpot, documents store in Google Workspace, and Asana opens the matter pipeline automatically.

### PLAYS WELL WITH

Clio

DocuSign

LawPay

Filevine

### OUTCOME

**Higher-value cases signed faster.**

# 03

## **Practice-area SEO, AEO & legal FAQ schema**

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*Be the firm AI engines cite.*

### THE PLAY

We build deep practice-area pages, mark them up with LegalService and FAQ schema, and seed authoritative content on Avvo, FindLaw, and Justia so AI answer engines surface your name when prospects ask. Google Maps stays current, Canva builds every practice-area landing hero, and Mailchimp delivers your monthly explainer to subscribers.

### PLAYS WELL WITH

Avvo

FindLaw

Justia

Schema.org LegalService

### OUTCOME

**Inbound from search and ChatGPT alike.**

# 04

## 'The Counsel' podcast

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*Plain-English legal explainers — credibility on tap.*

### THE PLAY

Short, ethics-reviewed episodes explaining what to do after a car accident, how a will actually works, or trademark basics. Clipped to YouTube Shorts and LinkedIn for steady authority-building. Hosted through Google Workspace, edited in Canva, and pushed to LinkedIn and Mailchimp with one publish.

### PLAYS WELL WITH

Riverside

Descript

LinkedIn Audio

### OUTCOME

**Prospects arrive pre-sold on your expertise.**

# 05

## **Digital avatar of the founding attorney**

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*A warm, human intro before the first call.*

### THE PLAY

Your founding attorney's avatar welcomes site visitors, explains your process and fee structure, and reduces the hesitation of picking up the phone for legal help. Surfaces on landing pages, runs inside HubSpot nurture sequences, and shares from Gmail with one click.

### PLAYS WELL WITH

HeyGen

Tavus

ElevenLabs

### OUTCOME

**Higher consult-booking rates from web traffic.**

# 06

## **Agentic AI matter coordinator**

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*Intake -> conflict check -> engagement letter -> calendar.*

### THE PLAY

A custom agent moves new matters end-to-end: pulls intake into Clio, runs the conflict search, drafts the engagement letter for review, sends it via DocuSign, collects the retainer through LawPay, and schedules the kickoff. HubSpot or Salesforce logs the matter, Xero or QuickBooks Online invoices the retainer, and Slack confirms the kickoff to the team.

### PLAYS WELL WITH

Clio Manage

DocuSign

LawPay

Google Workspace

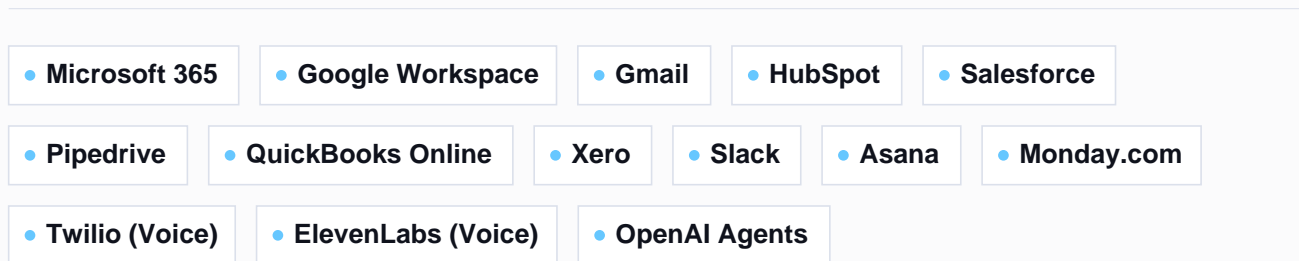
### OUTCOME

**From inquiry to retained client without the bottleneck.**

## INTEGRATIONS

# Lives inside your stack.

Voice, agentic workflows, and Google products — wired into the everyday SaaS your legal & professional services business already runs on. Plus every vertical-specific tool listed in the chapters.



## ALSO

*QuickBooks Online, Xero, FreshBooks, Wave, HubSpot, Salesforce, Pipedrive, Zoho One, Freshworks, Odoo, Microsoft 365, Google Workspace, Gmail, Google Maps, Slack, Monday.com, Asana, Trello, Canva, Shopify, Square, Mailchimp — and the vertical-specific tools already named in the chapters above.*



HELPING CONNECTIONS HAPPEN.

READY WHEN YOU ARE

# Let's build the intake engine your firm has been missing.

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We design, integrate, and operate the whole stack. You watch the numbers move. Reply to the email this PDF arrived with — or book a 30-minute strategy call and we'll map your playbook in real time.

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EMAIL

[hello@ayudaconnect.com](mailto:hello@ayudaconnect.com)

BOOK A CALL

[ayudaconnect.com/book](https://ayudaconnect.com/book)

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