

AI disruption and the death of the call center

AI means we now have the power to directly reach consumers in need of a good lawyer

BY ROBERT T. SIMON

We can be the best lawyer in the world, but if the clients cannot easily find us, it matters not. A lot of the time the best lawyers love just lawyering. We don't have time for marketing. Systems. Intake. Call centers. For far too long, the best PI lawyers have been hidden from consumers by large firms. These large firms and digital marketing companies, being flush with cash from private equity, dominate SEO, Google Paid Ads, billboards, social-media ads, etc. They have call centers, many off shore, with hundreds of employees just answering phones all day. There are companies who do "lead generation" and "sell" those leads to law firms. The cost to acquire a case, or even compete due to this

has been absurd and it is getting worse.

I am sure we are all outraged by all the ads we are getting targeted with by folks like this who have no business even attempting to help consumers who have real needs and need a good lawyer to help them. It is also the reason we are all deemed "greedy trial lawyers."

What if I told you that this is all about to stop. That any lawyer will be able to have a "call center," and "intake," and "systems" for very little cost? That we can use AI to generate cases, AI to handle the intake, AI to find the best referral partner, AI to place everything directly into your system?

Take a deep breath. I know this feels scary. It was for me at first as well. But then it dawned on me. We now have the

power to go direct to consumers. And... still be great lawyers.

The most disruptive AI tool of the year has arrived

Traditional law firms rely on a receptionist to answer calls from new clients, and even existing clients. The receptionist has to know and understand generally the need of the person calling, route them to where they should go, take notes, and then later transcribe those notes and put them into a file. Many incoming calls are from customers they cannot help, yet they are tied up on the line, and do not know a lawyer to help them if outside the practice areas of their firm. Resources are wasted. The valuable time of our employees would be better served helping our clients, new and current, that fit our expertise.



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More sophisticated firms have a few folks ready to answer the phones. They use after-hour solutions outside business hours to make sure no call is missed. But this becomes expensive. It still requires a lot of manual tasks. It also requires firms to work with folks doing their intake, an extension of their firm, who they do not know. A lot is missed, and I have heard far too many stories of “intake” realizing a big case is on the line and then referring it to another firm in a very unscrupulous way.

This is all about to change. We are all about to have the same receptionist. The receptionist knows every practice area. Is empathetic. Does not miss a detail. It speaks every language. It is available 24-7. It can take hundreds of calls at the same time. It takes real-time notes that have added intelligence and work flows. It knows your law firm’s criteria. If it meets those criteria, then the potential client is getting a real-time text message and email, while alerting the lawyer that there is a client waiting there to talk. It will push all the call information, sorted, directly into your case-management system. The entire transcript of the call will be there as well. This is AI Voice Intake.

Now take this a step further. Many are using this tool, right now, to quickly convert clients who fit their firm’s criteria. But what happens to all the folks that need help, have a real case, but are outside your practice area or geographic location? Well, these AI Voice Intake providers have integrated with a platform so that, in real-time, while the consumer is on the call, it is finding the best lawyer for that client they cannot help. In every practice area. In every state in the country. It is automatically posting the case to the groups of lawyers who fit the criteria for that case and client. The law firm who got the call can then refer or co-counsel on a scale never before seen. All tracked. All automated. Consumer calls about a

family issue in Michigan? No longer does your receptionist say you cannot help them. It will now find the best match. And you have to do... nothing. Potential client calls about a worker’s comp case in Nebraska? Found, matched, tracked. That toxic tort, or mass tort? Sent to the firms on leadership, pushed directly to their case-management systems, all with transparency and tracked.

The power is finally back in the hands of the real law firms. Let’s discuss how to do this.

Widening your net

Legal digital marketing is the most expensive and competitive sector in the country. Number one. Here are some very simple suggestions, extremely low cost. In June 2024 I was published in *Advocate*, on *Passive income: Referral and co-counseling fees*. This still holds water. Since then, I have personally been building to be able to take this to the next level, so that all of us can compete, and compete at an extremely low cost. Let the best lawyers win.

- SEO using AI – did you know that there are services to build out the SEO content on your law firm pages, for all practice areas, and using AI can do a million pages... a day? Well, you do now. Just make sure all those folks calling can talk directly to your anywhere receptionist outlined in this article!

- The Branded Lawyer – consumers are searching for specific lawyers more often these days. Ones they see on social media who they feel like they know. With just your iPhone you can record content, and list the phone number for your AI intake and you can now help an infinite number of people.

We had a meeting with folks really high up at Google to see if Google Law is coming out. But they are heavily concerned about losing search-engine territory to TikTok, Instagram and Chat GPT. And guess who can dominate those platforms for free. You.

If you are working with a vendor who manages your digital marketing, they *should* be happy to help widen your net, hook you up with AI Intake Solution with the plug-in to go from one... to all.

Building your AI intake solutions

Artificial intelligence is becoming much faster, much more accurate, and much... less expensive. Just a few months ago AI Intake Solutions were robotic, slow, and cost prohibitive. But now? Sheesh. Very accurate, fast, and costs are going way down. All the companies are competing to be the best and least expensive. We built ours from scratch. 424-677-0952. Give it a listen. This is just our “test one.” I would give y’all our real one, but I know several of you who think the Jerky Boys from the 1990’s were the funniest humans ever, and I do not want my intake team chasing down your fake cases!

With our AI voice intake we have, in real time, been able to send a client who does not fit our criteria to who we believe is the best for them, all automated with the Direct Share API by Attorney Share. We have been building this for a long time with the mindset of helping the consumer quickly get their best advocate and getting rid of the bad players who treat our folks like widgets.

As a quick aside, we all should be recording our phone calls, and ethically disclosing that we are doing so, and asking for permission. Many firms like mine use Call Rail to attach to our phone systems so nothing is missed, then add intelligence on top of it.

The line-up of AI Intake Agents

Here are some companies who are ahead of the game with their AI Intake Agents, who also have the plug-in to automate referring out cases that do not fit your firm’s criteria (I have no financial interest in these, but trust me, I would love to!):

- LawyerLine.ai powered by Lawyer.com: Colleen Joyce, CEO and founder



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of Lawyer.com is a visionary in our space, well ahead of the game, and already offering this intake solution, as well as ones with human beings. They have screened millions of cases across all practice areas of the last decade. They use that experience to have a true understanding of all intakes, and they nail it.

- Legal Navigator AI by Law Leaders: Dustin Ruge, who knows this space very well, created his subscription offering using their AI voice intake with add-ons if you like. \$150 base set up fee, and \$200 a month for your anytime receptionist at only 35 cents a minute.

- Whippy AI – David Daneshgar is the CEO founder, and has dominated the consumer product and other verticals using technology. He applied this principle to help law firms leverage an AI Chat Bot that would automatically go into your firm's intake and case management system. He took it to the next level with their AI voice intake system. Their pricing is similar to the companies above.

- Capture Now – Gary Falkowitz is the co-founder and well known for being an intake specialist and case conversion guru for a very long time. He replicated these processes with their AI intake to make sure a conversion is never lost.

There are many more popping up almost every day. We are about to be targeted with new players daily. Just remember that these AI products are only as smart as what they are taught. By working with folks like the ones above, who have been in the game a long time, we should have more assurances that it is the right kind of intelligence. Best practice is to ask them if they have the integration to find your prospective client a lawyer if the intake information does not meet your criteria. I know firms that are automatically matching their referral partners with this workflow, all plugged into their existing intake, zero lift, and paying

only \$300 a month for posting 1,000 cases.

I have done the math, and by using a vendor to do your intake, and be your call center, and by having anything outside your case criteria automatically referred out and tracked... you are looking at a cost of like \$750-\$1000 a month. Let's call it \$15K a year just to be safe. \$15K a year for your entire call center. \$15K a year is matching about three referrals. If done correctly, you are using this system that is paying you to use it *and* helping consumers to find their best advocate.

Guardrails and ethical considerations

We must put guardrails on any artificial intelligence. When using this AI intake solution you must make it expressly clear that the consumer is talking to AI, that the call is being recorded, and that you have their permission. Remember, this is still *your* intake – an extension of your firm. While it is likely smarter than almost all lawyers (especially me), it is *not* a lawyer and *cannot* give legal advice. It cannot give guarantees on outcomes. It cannot promise dollar-figure results. It cannot give medical advice. Make sure you teach your AI voice intake to be a good little robot!

Other use cases

There are many legal tech vendors that offer solutions for law firm-to-client communications that are automated and many use AI. But a few have taken it a step further and either created or partnered with an AI voice-intake solution so that if that law firm's client has a new legal issue... they can just push a button, or make a call. Right from their app! The folks that have great direct-to-client apps or platforms for their current case are HONA, Case Status, Casetracks and Quilia.

HONA built their own AI Intake, which can integrate with Attorney Share,

so that if the client has a case that meets that law firm's criteria, it goes right to that law firm. If not, it goes out through the marketplace to match the referral. All automated and tracked.


Casetracks and Quilia partnered with others so that when their law-firm clients request this service, they can easily add it on for all their clients. Heck, my law firm built a consumer-facing app that consumers can download for free, and if they need a lawyer for any purpose, they can just push a button, talk to our AI voice agent, and find their best advocate. Sometimes us, sometimes not. Call it a lawyer in your pocket. Call it anytime justice. But I call it true access to justice.

The next disruption?

In the workflow above we can see how easy it will be to find the best lawyer for the consumer who calls any law firm in the country. What happens next will be the next disruption using artificial intelligence. The use of AI Agents to order the police report, open the claims, send rep letters, order medical records, constantly engage and update the client, etc. There will be an automation of the entire pre-litigation practice, and it will be here faster than we think.

Conclusion

Arthur Miller wrote "Death of a Salesman." We now have the collective power to write "Death of the Call Center." The era of the real lawyers has arrived. The phoenix is rising. Are you ready for it?

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