

SCORPION®

NOT ALL AI IS CREATED EQUAL:

# How to Evaluate AI for Law Firm Marketing

A practical guide to using AI to increase  
visibility, intake, and signed cases

ChatGPT

## 1. Check Local Reviews and Ratings

Search review platforms:

- Google Business Reviews
- Avvo
- Justia
- Martindale-Hubbell
- Yelp (sometimes useful)

Look for:

- High overall rating
- Consistent positive feedback
- Specific praise in your legal area

## 2. Verify Credentials and Reputation

Key things to check:

- Years in practice
- Board certifications or special recognitions
- Disciplinary history (state bar)
- Peer endorsements

I can help look up these things for attorneys you're considering.

## 3. Prioritize Local Experience and Track Record

Review local opinion and results

- Results in both verdicts and settlements
- Review news and press results
- Familiarity with local laws, judges, and procedures

If you'd like, I can also:

- Help you evaluate a specific attorney
- Compare two or more attorneys
- Create a shortlist based on reviews and credentials

Ask anything

Create image

ChatGPT can make mistakes. Check important info.

How do I find the best attorney in my area?

Voice

## THE PROBLEM:

# AI Noise Is Everywhere



Law firm leaders are exposed to AI messaging from every direction: emails, ads, industry events, social media, webinars, and more. Claims of how AI helps with law firm marketing are loud, but proof is thin. The real question is simple: **where does AI actually increase retained cases and revenue?**

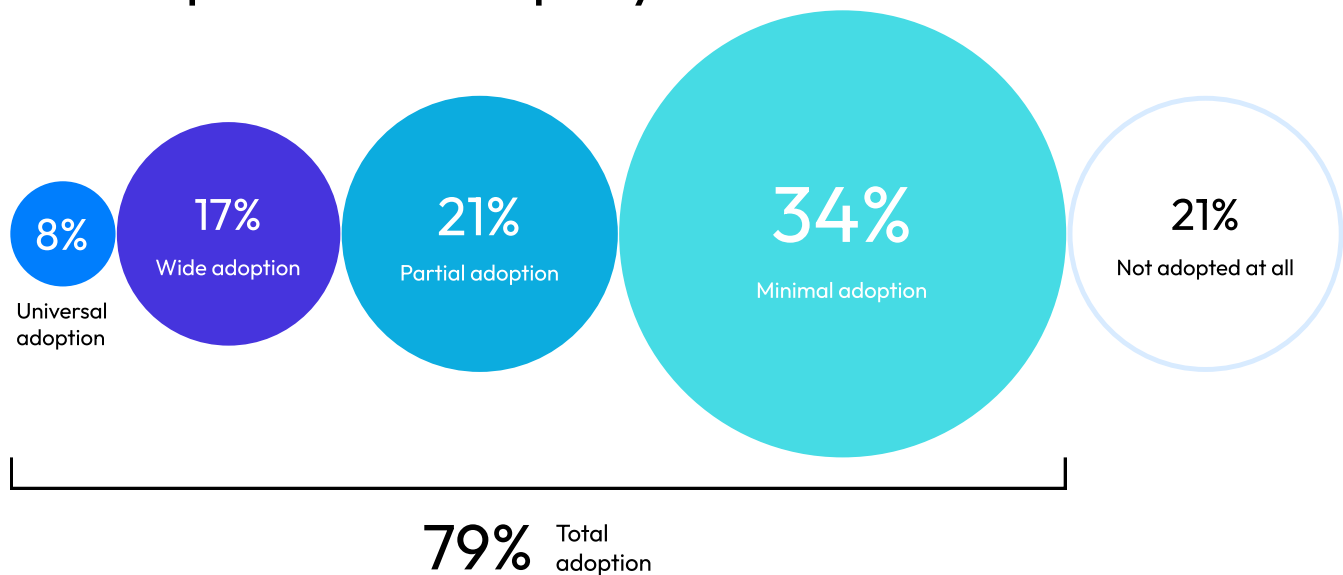
The firms getting ahead are being found by the right clients, responding within minutes, and moving accurate information into intake and case management so staff can follow through. The risk is investing in tools that add work, create messy data, and never connect to business outcomes.

This guide explains how firms can apply AI to marketing, operations, and business development, with emphasis on search visibility, efficient lead intake and follow-up, and seamless handoffs into intake and case management tools.



# AI Adoption Is Not Increasing. It Is Skyrocketing.

The vast majority of lawyers  
have adopted AI in some capacity



Clio Legal Trends Report. (2024). 2024 Legal Trends Report: AI Is Disrupting the Legal Industry.

In 2023, only **19%** of firms reported using AI. Today, **79%** of legal professionals use it in some capacity. Among wide adopters, 69% report a positive revenue impact, versus 36% overall. Adoption is no longer optional; planning should focus on where AI delivers measurable gains in visibility, response time, intake, and signed cases.

## What this means for planning

Assume AI is part of the plan, then focus on where it can drive the most impact. Set targets for search visibility, response times, and the handoff into intake and case management.

## Your Firm's AI Planning Checklist

- ✓ Treat AI as part of the core marketing and business development plan, not a separate experiment.
- ✓ Prioritize use cases tied to conversions, response times, and signed cases.
- ✓ Select tools that integrate with intake and case management systems to reduce manual entry and ensure clean handoffs from first contact to a signed case.





# What Law Firms Should Demand From AI

AI only matters when it produces outcomes you can track and act on: more qualified leads, a lower cost per signed case, faster response and follow up, higher client satisfaction, and time saved through efficient processes.

Evaluate each tool against four standards:

## 1 Real Value

Impacts your firm's signed cases and revenue, not just traffic, forms, or calls.

## 2 Integrated Systems

Connects across advertising, chat, calls, forms, and communications, continuing beyond marketing and business development to intake and case management.

## 3 Built for Legal

Understands how legal consumers make decisions and how firms intake, qualify, and communicate with prospective clients.

## 4 Proven Results

Backs claims with verified outcomes from comparable firms, including starting metrics, measured improvements, and what drove the change.

## Quick AI Readiness Checklist

Use this checklist to confirm the essentials that make AI measurable, safe for clients, and practical for your staff. Many firms start without all of these in place. Treat them as helpful accelerators, not prerequisites. The right marketing partner can help your firm strengthen each area over time.

### Helpful to have:

- ☐ Performance targets defined and measurable.
- ☐ Intake system and calendar availability configured.
- ☐ Up-to-date practice area content to ground AI responses.
- ☐ Lead routing and follow-up workflows clearly documented.
- ☐ Reporting that links lead sources to consultations and retained cases.

### Not all in place yet? Start anyway.

- ☐ If targets are unclear, begin with benchmarks and set goals 30 days post-launch once you have data.
- ☐ If calendars are not integrated, offer call-back or request-a-time options and add scheduling later.
- ☐ If content is light, use core firm facts (locations, hours, services) and add FAQs over time.
- ☐ If lead routing is informal, use a default path first and refine as patterns emerge.
- ☐ If reporting is limited, start with source-to-lead, then connect to consultations and retained cases as you integrate more systems.





# Where to Embrace AI

AI should be adopted where it shortens response time, improves intake, and ensures accurate data flow.

## Faster Intake and Communication

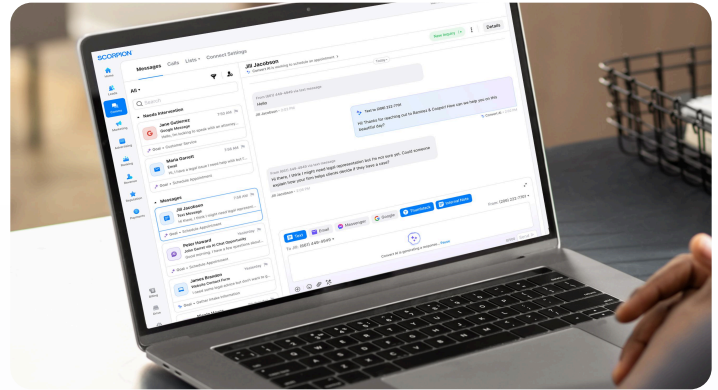
Potential clients expect replies within minutes. More than **70%** of people will move on if firms don't respond within 24 hours. Tools like **AI chat** and **Convert** can reply instantly, set expectations, and begin intake outside business hours.

## Understanding the Case

AI can guide basic, non-legal questions: issue, location, urgency, and contact info. This avoids asking for confidential details too soon while filtering out conflicts or out-of-scope matters.

## Scheduling Consultations

Offer times, confirm format, and send reminders to improve show rates. Automated follow up helps prevent missed appointments.



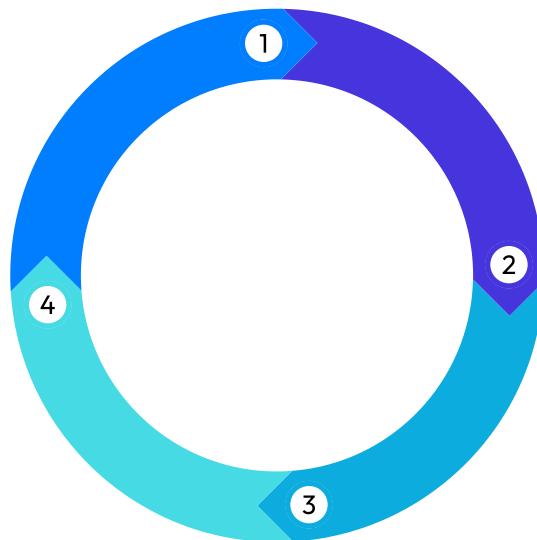
## Seamless Handoff

AI should push data into intake and case management systems automatically. Standardized details like names, dates, and summaries prevent errors and duplication.

**When done well, prospects receive a reply within minutes, the same core details are captured every time, consultation show rates rise, and an intake record is created in case management for every new contact.**

### The 4 Step Intake Flow That Works

- 1 Answer fast**  
Improve intake with immediate responses to new inquiries.
- 2 Understand case fit**  
Ask basic questions to ensure the case is within your firm's scope.
- 3 Schedule the consultation**  
Offer available times and send reminders.
- 4 Send to your team & systems**  
Connect to intake and case management.





## Improve Visibility for AI Search

Clients still rely on Google, and now AI-generated summaries [influence decisions](#), too. Prepare for both by publishing matter-specific content and FAQs that reflect real client questions while investing in your brand, reputation, and telling your story through video. Keep the firm's core facts consistent everywhere: legal name, locations, phone numbers, hours, service areas, practice areas, attorney credentials, and appointment links.

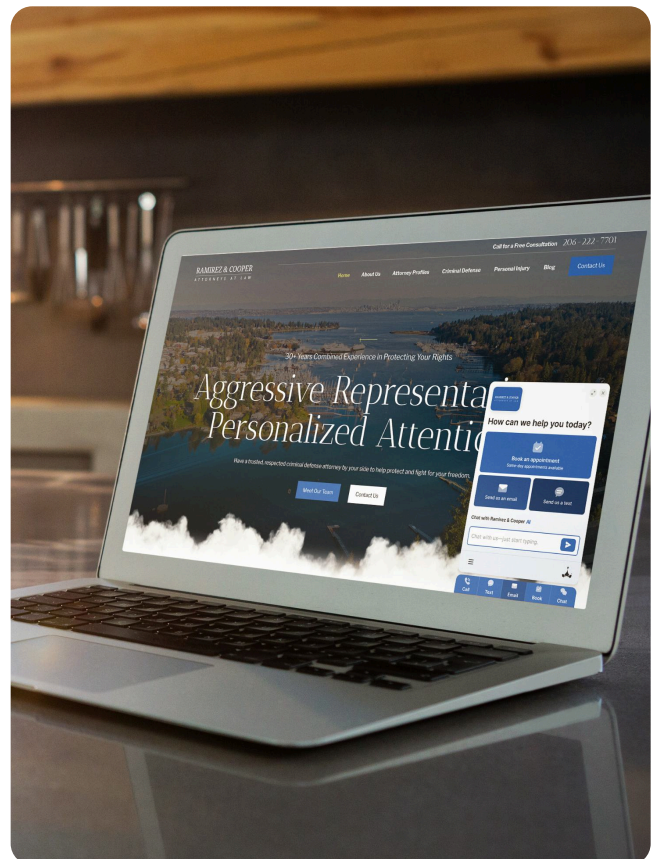
## Streamline Operations Through Integrations

[Integrations](#) connect marketing touchpoints to intake and case management, enabling firms to understand the true value of their marketing. They eliminate duplicate entries, reduce mistakes, and create a single record from first contact to retained client. Tasks, updates, and notes can move automatically, keeping files consistent and current.

### Best Practice Snapshot

Use these benchmarks to see if AI is set up to help your firm respond faster, capture consistent information, and move data cleanly into case management.

- ☐ First response in minutes, 24/7.
- ☐ The same core details captured every time: issue, location, urgency, and contact info.
- ☐ Consultations scheduled at first contact, with reminders to increase show rates.
- ☐ Automated follow-up to keep conversations moving after hours and on weekends.
- ☐ A standardized intake record created in case management for every new contact, no retyping.
- ☐ Marketing, chat, forms, and phone all connected to intake and case management systems so tasks, notes, and status updates stay in sync.



# What to Watch Out For

AI can help firms respond faster, sign better cases, and reduce strain on staff. But without planning, it introduces risk. These are the four issues that matter most, along with concrete steps to manage them.

## 1 Data leakage and confidentiality

**The risk:** Prospective-client details stored longer than expected, shared inappropriately, or reused to train outside models.

**How to reduce the risk:** Ensure vendor contracts ban training on firm data, limit retention, and enforce role-based access. Information is protected in transit and at rest, with audit logs that track access and changes.

## 2 Inaccurate or misleading responses (or hallucinations)

**The risk:** AI generates confident but incorrect statements about practice areas jurisdictions, fees, or outcomes.

**How to reduce the risk:** Ground responses in firm-approved content and require the AI to use exact hours, phone numbers, locations, and other core details from a single approved source. Require internal approval by a named role before the homepage, practice area pages, landing pages and ads go live.

## 3 Vendor data handling

**The risk:** Unclear storage location, retention, sub-processors, and no audit trail.

**How to reduce the risk:** Specify storage, retention, and sub-processors in the agreement; require audit logs, export and deletion capabilities, and breach response details.

## 4 Generic models without legal guardrails

**The risk:** Tools drift into giving legal advice, making promises, or asking for sensitive information prematurely.

**How to reduce the risk:** Enforce industry-specific guardrails that block legal advice, outcome promises, and premature collection of sensitive information. Pair those guardrails with a combination of human and automated evaluation to test responses across scenarios and ensure ongoing compliance. Define escalation rules so sensitive or complex situations go to staff with documented follow-up.

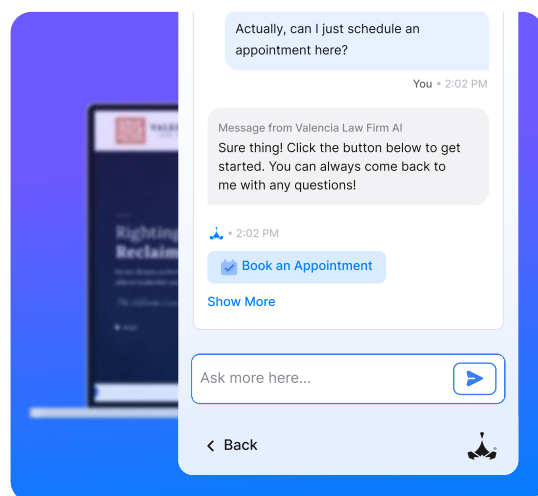




# Top 3 Ways Scorpion's AI is Better

**Scorpion** builds AI for law firm marketing and ties it to outcomes the business can measure. With more than 20 years of experience in legal marketing, Scorpion's AI is better because it is legal-specific, revenue-centered, integrated, and trusted.

The framework is simple and memorable: legal-specific, revenue-centered, integrated and trusted.



## ① Legal-Specific Intelligence

Scorpion's AI is trained for legal intent and intake. It understands the difference between an urgent criminal defense issue and a research-oriented estate planning question. It captures the necessary details and pre-qualifies for firm fit before staff time is used. It provides value to clients and prospective clients by showing empathy and answering questions about the firm in a conversational way, while avoiding legal advice and requests for sensitive information. The result is cleaner information for intake teams and less time wasted.

### What this looks like in practice:

- | Responses shaped by practice area and urgency, modeled on the kinds of questions prospective clients ask.
- | Exact firm details for locations, hours, phone numbers, and attorney credentials pulled from a single approved source.
- | Guardrails that avoid promises and advice, with escalation to internal follow-up when needed.

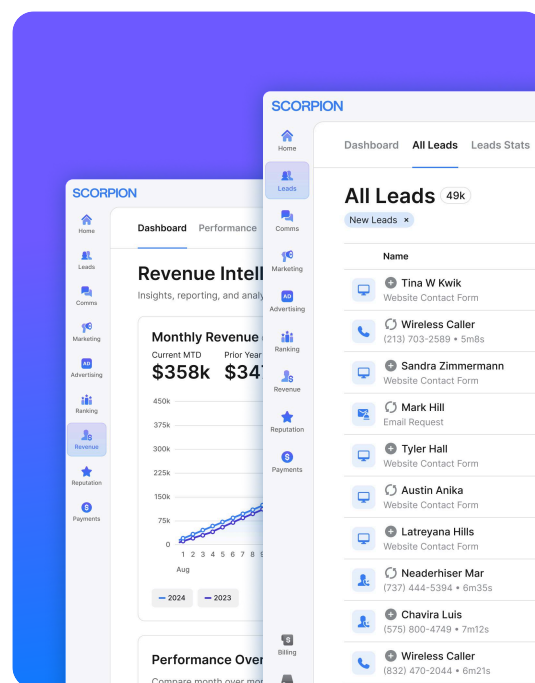


## ② Revenue-Centered Outcomes

Success is measured by retained clients, not just leads. Calls, chats, and forms are tied directly to consultations and signed cases. You can see which channels drive revenue, while Scorpion automatically shifts investment toward what works. The goal is clear: help the firm secure more of the right cases.

**What this looks like in practice:**

- Lead source to revenue attribution that shows which marketing efforts led to retained clients.
- Prioritization of quality leads so the team focuses where it counts.
- Actionable reporting for decision makers, with Scorpion automatically allocating your budget to the channels that work.

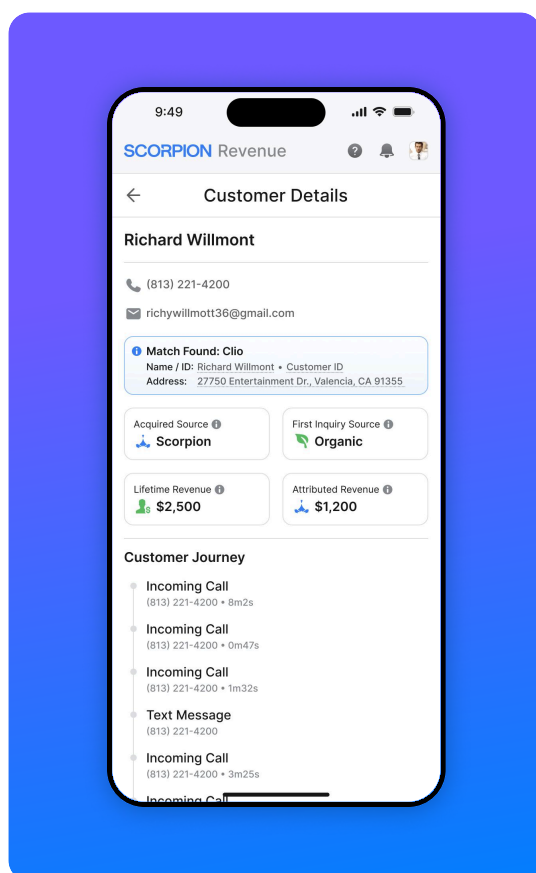


## ③ Integrated, Trusted Platform

Scorpion AI runs inside the **RevenueMAX** platform that thousands of firms already rely on for websites, marketing, **chat**, call tracking, and communications. It integrates with leading intake and **case management solutions**, so performance is connected from first click to retained client. Adoption is faster because it fits the systems and workflows firms already use.

**What this looks like in practice:**

- One place to see the whole picture.** A single view from first contact to retained client for marketing, intake, and signed matters.
- Nothing lost between systems.** Shared data across marketing, intake, and case management systems keep records consistent and error-free.
- Fast adoption with minimal lift.** Integrations plug into current intake and scheduling processes so teams keep working the way they do today, with less manual work.



# Scorpion Data Protection at a Glance



## Models and platform

Scorpion uses OpenAI models through secure APIs and layers them with Scorpion-built systems. Consumer chat tools are never involved.



## Data is not used to train models

OpenAI does not use Scorpion's API inputs for training. API data is not stored beyond 30 days.



## Where data lives

Data is processed and stored inside Scorpion's managed environment on Microsoft Azure and in Scorpion co-located data centers.



## Protections in place

Distributed denial-of-service (DDoS) protection, VPN with multi-factor authentication, intrusion detection and prevention, extended detection and response on all endpoints.



## Who can see what

Role-based access ensures only authorized staff and systems see the minimum data required for AI tools to operate.

Law firms handle sensitive client information, making data security paramount. These safeguards ensure that intake details and conversations are protected, minimizing ethical risks and maintaining client trust. This allows firms to confidently leverage AI for faster intake, improved follow-up, and seamless integration with case management systems.





# What This Means for the Bottom Line

AI should add to your results, not add noise. Scorpion's RevenueMAX, powered by AI, helps firms:

- | Stand out and get hired.
- | Get more of the right leads.
- | Increase scheduled consultations by being the first to respond.
- | Be available 24/7, even when you're not working.
- | Know what marketing efforts are bringing in new clients and cases.

## Client Success: Real Firms, Real Outcomes

These examples show what [Scorpion's RevenueMAX](#) delivers across practice areas. Each outcome is measured against business metrics that matter: signed cases, revenue, cost per lead, and ROI.



**Hunt Law Firm, PLLC**

**12x**  
Return on Investment



**Albers & Associates**

**69%**  
Revenue Increase



**E.A. Wood Law Firm**

**15%**  
Revenue Increase



**Arnold & Itkin**

**6x**  
Increase in New Cases



**Shapiro, Zwanetz, and Lake**

**12x**  
Return on Investment



**Coker, Robb & Cannon**

**7x**  
Return on Investment

# Questions To Ask Marketing Vendors Using AI

- ① How is client data protected across prompts, storage, access, and retention?
- ② What legal-specific training guides responses and intake?
- ③ How does the system integrate with our intake and case management tools?
- ④ How does performance connect to signed-case revenue, not just leads?
- ⑤ How does it save staff time and reduce manual work?
- ⑥ What results have you delivered to similar-size firms in markets like ours?

## Your Firm's Next Step

In a market full of noise, firms do not need another AI pitch. They need results they can measure. That is why Scorpion built AI differently. It is legal-specific, integrated, and proven to deliver business outcomes.

Keep your firm ahead of the curve by embracing AI now to streamline pre-intake, enable always-on triage across phone, chat, and forms, personalize site experiences by matter type, and connect marketing to case value insights for better budget decisions.

Firms that embrace AI early gain faster response times, lower acquisition costs, and more signed cases. Early adopters will keep more revenue in house and build a predictable growth engine.

Ready to see how Scorpion's AI-backed technology can help your firm get found by the right clients, respond faster, and turn more conversations into signed cases? Visit [scorpion.co/law-firms](https://scorpion.co/law-firms).

