THE AUTOMATED ATTORNEY

Zero-Touch Intake

Notion Dashboard — Build Guide

A complete, field-by-field blueprint for building a client intake command center in Notion — lead pipeline, conflict-check tracker, follow-up automation, and engagement-letter status.

Edition 1.0 ● Build time: ~90 minutes

What You're Building

This guide walks you through building a self-contained Notion workspace that takes a prospective client from first contact to signed engagement letter, with almost nothing falling through the cracks. By the end, you'll have four connected databases and one dashboard view your whole team can work from.

Time & tools: About 90 minutes, a free or paid Notion account, and (optionally) a Zapier or Make.com account if you want to automate the intake-form-to-database step described in Part 5.

The four databases

- Leads — every prospective client, from first inquiry through decision.
- Conflict Checks — a linked tracker so no matter starts before a clean conflicts result.
- Follow-Ups — a task queue that ensures no lead goes untouched for more than 48 hours.
- Engagement Status — tracks the letter from draft to countersigned.

Part 1 — Set Up the Leads Database

Create a new full-page database in Notion called Leads. This is the spine of the whole system — every other database links back to it.

Fields to create

Field name	Type	Purpose / options
Client Name	Title	The default title field — full name of the prospective client.
Status	Select	New → Contacted → Consult Scheduled → Conflict Check → Engaged → Declined → Lost
Practice Area	Select	Match to your practice areas, e.g. Family, Estate, Business, Litigation
Source	Select	Referral, Website, Google Ads, YouTube, Repeat Client, Other
Date Inquired	Date	Auto-set to today when a row is created; used for response-time reporting
Phone / Email	Phone / Email	Contact info — Notion validates format automatically
Urgency	Select	High / Medium / Low — for triage when volume spikes
Est. Matter Value	Number (currency)	Rough estimate for pipeline-value reporting
Assigned Attorney	Person	Notion's People property — assign responsibility immediately
Conflict Check	Relation	Linked to the Conflict Checks database (Part 2)
Engagement	Relation	Linked to the Engagement Status database (Part 4)
Notes	Text	Free-form intake notes

Part 2 — Set Up the Conflict Checks Database

Create a second full-page database called Conflict Checks. This exists so a matter can never quietly skip this step — it's a visible, trackable gate rather than a mental checklist.

Field name	Type	Purpose / options
Lead	Relation	Linked back to the Leads database
Search Run By	Person	Who performed the search
Date Run	Date	When the search was performed
Result	Select	Clear / Potential Conflict / Conflict — Declined
Waivable?	Checkbox	Only relevant if a potential conflict is flagged
Reviewed By Partner	Checkbox	Sign-off gate before a matter can move to Engaged

Connect it to Leads

1. Open the Leads database and add a new property called Conflict Check with type Relation, pointed at Conflict Checks.
2. Notion will automatically add a matching relation property back on the Conflict Checks side.
3. On the Leads database, add a Filter view called "Awaiting Conflict Check" showing rows where Status = Conflict Check and the Conflict Check relation is empty.

Part 3 — Set Up the Follow-Ups Database

This is the database that actually prevents leads from going cold. Every new lead automatically needs a first follow-up task.

Field name	Type	Purpose / options
Task	Title	e.g. "First response call", "Send engagement letter"
Lead	Relation	Linked back to the Leads database
Due Date	Date	When this follow-up is due
Owner	Person	Who's responsible
Done	Checkbox	Marks the task complete
Type	Select	Call, Email, Text, Internal Review

The 48-hour rule view

Create a Board view grouped by Due Date, filtered to Done = unchecked. Add a second Filter view called "Overdue" where Due Date is before today and Done is unchecked — this becomes your daily first stop each morning.

Part 4 — Set Up the Engagement Status Database

Tracks the engagement letter itself, separate from the lead record, so status is visible without opening the full file.

Field name	Type	Purpose / options
Matter	Title	Matter name / short description
Lead	Relation	Linked back to the Leads database
Letter Status	Select	Not Started → Drafted → Sent → Countersigned → Filed
Date Sent	Date	When the letter went out for signature
Fee Structure	Select	Hourly / Flat Fee / Contingency / Retainer
Retainer Received	Checkbox	Gate before opening the matter formally

Part 5 — The Zero-Touch Part: Auto-Creating Leads

This is what makes the system "zero-touch" — new inquiries land in the Leads database without anyone manually typing them in.

Option A — Notion Forms (simplest, no extra tool)

4. On the Leads database, click the ••• menu and choose "Create form."
5. Map form fields to Client Name, Phone/Email, Practice Area, and Notes.
6. Publish the form and embed the link on your website's contact/intake page.
7. Every submission creates a new row with Status automatically defaulted to New.

Option B — Zapier / Make.com (for existing website forms or Calendly)

8. Trigger: New form submission (Typeform/website form) or New scheduled event (Calendly).
9. Action: Notion → Create Database Item, mapped to the Leads database.
10. Map incoming fields to Client Name, Phone/Email, Practice Area, and Source.
11. Add a filter step so only submissions with a filled-in name/email create a row (avoids blank test entries).

> **Tip:** Whichever option you choose, set Status's default value to New and Date Inquired's default to "today" so every auto-created lead is immediately visible in your daily triage view.

Part 6 — Build the Dashboard View

Create a new page called Intake Dashboard. This is the single page your team opens every morning.

- Linked view of Leads, filtered to Status ≠ Engaged/Declined/Lost, grouped by Status (Board view).
- Linked view of Follow-Ups, filtered to Overdue (from Part 3).
- Linked view of Conflict Checks, filtered to Result = empty (awaiting a result).
- A callout block at the top listing this week's intake volume, using a simple count of Leads where Date Inquired is within the past 7 days.

Suggested layout

Two columns: left column stacked with the Overdue Follow-Ups and Awaiting Conflict Check views (the "needs action today" side); right column with the full Leads board (the "where's everything at a glance" side).

Ongoing Maintenance

- Review the Overdue Follow-Ups view every morning before anything else.
- Archive (don't delete) Leads marked Declined or Lost quarterly to keep the active board clean — Notion's filters will still let you report on them.
- Revisit your Status options every few months; add stages if you notice leads consistently getting stuck between two existing ones.
- If your intake volume grows past what one Follow-Ups database can comfortably show, consider a saved "My Follow-Ups" per-attorney filter view rather than splitting the database.

Need this built for you? If you'd rather we build and configure this Notion workspace directly in your account — including the Zapier/Make.com automation — book a firm audit at taa.partners/consulting.