THE QUIET PROTOCOL
AI SYSTEMS & AUTOMATION

Estate Planning Authority Kit

A starter kit for estate-planning and elder-law firms that want stronger public answers, better trust signals, and more confident consult preparation around family decisions.

Estate-planning attorneys, elder-law attorneys, intake leads, and legal marketers

GUIDE

A starter kit for estate-planning and elder-law firms that want stronger public answers, better trust signals, and more confident consult preparation around family decisions.

WHAT THIS ASSET COVERS

- Estate Planning Answer Map
- Estate Planning Trust and Consult Guide
- Elder Law Family Decision Guide
- Elder-Law Referral Trust Playbook
- Professional Services Proof Stack Guide
- Trust-Signal Architecture Guide for Small Businesses

SUGGESTED ROLLOUT

1. Clarify family-facing answers around documents, process, and decision patterns before consults begin.
2. Strengthen public trust signals so the firm feels more prepared and more credible for sensitive planning work.
3. Use elder-law, referral, and family-decision guidance to support the more emotional stakeholder moments around care, capacity, and crisis timing.
4. Review proof and consult-preparation assets monthly so authority compounds with real client questions rather than drifting into generic copy.

WORKING ASSET

Bundle the answer, trust, and family-guidance assets that help estate-planning and elder-law firms feel clearer and more prepared before the first consultation.

RESOURCE STACK

- Estate Planning Answer Map
- Estate Planning Trust and Consult Guide
- Elder Law Family Decision Guide
- Professional Services Proof Stack Guide
- Trust-Signal Architecture Guide

DEPLOYMENT PATH

Phase 1:

- strengthen family-facing answers and preparation guidance

Phase 2:

- repair trust signals and consult-support content

Phase 3:

- review whether the public authority layer is improving consult quality

METRICS TO WATCH

- consult readiness
- repeated family questions
- trust-asset freshness
- quality of planning consultations

OPERATING CADENCE

Monthly:

- review intake confusion and trust gaps
- update answer and guidance assets

Quarterly:

- compare public authority cues to the real consult experience

OWNER CHECKLIST

Use this checklist before the document gets handed to staff. The goal is to turn Estate Planning Authority Kit into a live operating habit, not a file that sits in a folder.

- Name the single person who owns the workflow this asset touches.
- Pull one week of real evidence before changing anything: missed calls, form timestamps, chat transcripts, text threads, booking records, CRM notes, review requests, and staff handoff messages.
- Mark every request where the customer waited too long, repeated information, received a vague next step, or dropped before booking.
- Decide whether the issue is caused by unclear language, weak ownership, missing automation, poor routing, low trust, or a broken follow-up rhythm.
- Choose one workflow to fix first. Do not try to change phone, chat, forms, CRM, reviews, and reactivation all in the same week.
- Write the current rule in plain language. If the team cannot say the rule clearly, the customer will feel that confusion.
- Decide what good looks like. Use a response-time target, a handoff target, a booking target, or a review-request target.
- Review this asset every Friday until the workflow is stable for four straight weeks.

STAFF MEETING AGENDA

Use this agenda in a 25-minute meeting with the people who answer, route, book, follow up, or manage the customer relationship.

1. Open with the customer moment this asset is meant to improve.
2. Read one recent customer example out loud without blaming anyone on the team.
3. Ask where the current process made the customer's next step slower, less clear, or less trustworthy.
4. Review the checklist and remove any item that does not affect the customer journey.
5. Assign one owner for first response, one owner for booking or follow-up, and one owner for proof capture.
6. Decide which channel gets fixed first: phone, website form, chat, text, social message, CRM task, or review request.
7. Choose one script from this document and use it live for the next seven days.
8. Schedule the next review before the meeting ends.

COPY/PASTE SCRIPTS

Use these scripts as starting points. Replace the wording with the business name, service categories, market, office hours, and escalation rules.

Fast acknowledgement: Thanks for reaching out. I have your request and I am getting the right next step in motion now. I will confirm the details before anything is booked or assigned.

Missing information: I can help with that. To route this correctly, I need the service address or location, the best callback number, what is happening, and how urgent this feels today.

Qualified but not ready: That makes sense. I do not want this to get lost. I will save the details here and follow up at the time that makes the most sense for you.

Follow-up after silence: Just checking back so this does not sit unfinished. Do you still want help with this, or should we close the request for now?

Review request after successful work: Thank you for trusting us with the work. If the experience was smooth, a short Google review helps the next customer feel more confident choosing us.

Internal handoff: New request captured. Customer need, urgency, location, source, and next action are listed below. Please confirm ownership before the opportunity cools off.

INTAKE WORKSHEET

Field	What to Capture	Why It Matters
Customer name	Full name and preferred contact method	Prevents duplicate records and weak callbacks
Source	Phone, website, chat, referral, Google, social, repeat customer	Shows which demand channels need better routing
Urgency	Emergency, soon, flexible, research only	Controls response priority and staff escalation
Service need	Plain-language description from the customer	Helps staff avoid forcing the buyer into internal categories too early
Location	Address, city, service area, or remote context	Confirms fit before the team spends time on the wrong lead
Next step	Book, quote, call back, send info, waitlist, close	Prevents warm demand from sitting without ownership
Owner	Person responsible for the next action	Makes accountability visible
Follow-up date	Specific date and time	Turns intent into a calendar reality

METRIC TRACKER

Metric	Target	Review Rhythm	Owner
First response time	Under 5 minutes for web leads and under 4 rings for calls	Daily	Front-door owner
Qualified next step captured	90 percent or better	Weekly	Intake owner
Booking or follow-up assigned	100 percent	Weekly	Office lead

Missed inquiry recovery	Same day when possible	Weekly	Follow-up owner
Review or proof request sent after successful work	80 percent or better	Weekly	Reputation owner
Unowned open opportunities	Zero by Friday close	Weekly	Owner or manager

DECISION RULES

- If the request is urgent, route it before collecting nice-to-have details.
- If the buyer is comparison shopping, prioritize speed, proof, and a clear next step.
- If the lead is qualified but not ready, assign follow-up instead of letting the record sit open.
- If the customer repeats information twice, the handoff failed.
- If staff are rewriting the same explanation manually, turn the explanation into a script, snippet, or automation.
- If a review request depends on memory, the business does not have a review system yet.
- If the same problem appears across phone, chat, forms, and CRM, the business needs a system fix, not another reminder.

HANDOFF SOP

Use this SOP whenever a request moves from one person, channel, or system to another.

1. Confirm the customer identity and preferred contact method.
2. Summarize the need in one sentence a new team member can understand.
3. Label urgency without exaggerating.
4. Attach the source channel so reporting stays useful.
5. Record what the customer was promised.
6. Assign the next action to a named person or system.
7. Set a follow-up time.
8. Close the loop with the customer when the next action is complete.

A handoff is not complete when the note is written. It is complete when the next owner accepts responsibility and the customer knows what will happen next.

30-DAY ROLLOUT

Week 1: Audit the current workflow. Pull real examples and mark where response, routing, trust, booking, or follow-up breaks down.

Week 2: Test the working language. Use the scripts and worksheet on live customer requests. Keep the test narrow enough that the team can actually follow it.

Week 3: Add measurement. Review first response, qualified next step, booking assignment, follow-up completion, and proof capture. Fix the weakest metric first.

Week 4: Decide what should be systemized. If the workflow now works with manual ownership, keep it as an SOP. If it still depends on memory, install automation or move it into a managed AI Business Operating System.

IMPLEMENTATION NOTES

This asset is meant to be edited. Replace generic wording with the business name, service categories, staff roles, escalation rules, pricing boundaries, service-area rules, and follow-up timing. Keep the parts that make the team faster and remove anything that adds ceremony without improving the customer journey.

The best use of Estate Planning Authority Kit is not to make the business look organized on paper. The best use is to make the next customer easier to answer, easier to qualify, easier to book, easier to follow up with, and easier to turn into visible proof.

DEPLOYMENT NOTES

HOW STRONG TEAMS USE THIS ASSET

- Assign one accountable owner instead of letting "Estate Planning Authority Kit" become shared but unmanaged work.
- Use it with estate-planning attorneys, elder-law attorneys, intake leads, and legal marketers in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

30-DAY ROLLOUT SEQUENCE

- Clarify family-facing answers around documents, process, and decision patterns before consults begin.
- Strengthen public trust signals so the firm feels more prepared and more credible for sensitive planning work.
- Use elder-law, referral, and family-decision guidance to support the more emotional stakeholder moments around care, capacity, and crisis timing.
- Review proof and consult-preparation assets monthly so authority compounds with real client questions rather than drifting into generic copy.

WHAT SEPARATES A SERIOUS RESOURCE FROM A BASIC TEMPLA

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: Estate Planning Answer Map, Estate Planning Trust and Consult Guide, Elder Law Family Decision Guide, and more.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.