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A FLORIDA CRIMINAL DEFENSE PLAYBOOK

The Criminal Defense Firm Growth Playbook

Fifteen plays, five numbers, and a twelve-month outreach calendar for signing more of the people who call after an arrest. Written for Florida, in English and Spanish, and inside the Bar rules your license carries.

15	5	12	1
PLAYS	NUMBERS	MONTHS	PAGE OF RULES

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ADAY INTERACTIVE, INC. · CORAL GABLES, FL

START HERE

Most defense firms don't have a marketing problem.

> They have a 2 a.m. problem, a who-is-calling problem, and a visibility problem. All three cost less to fix than buying more leads, and most of the fixes start at intake.
>
> **And every one of them has a Bar rule attached that most marketing advice ignores.**

Criminal cases start with a frightened call, usually at night, and often from a mother, a spouse, or a friend instead of the person charged. The firm that answers first, explains the next step calmly, and keeps the facts off a recorded line usually gets the consult. The firm that calls back Monday usually does not.

This playbook turns those habits into fifteen plays. Each one fits on a page: why it works, what to say or build, the rule that applies, three things to do on Monday, and the number that tells you it is working.

LegalCRM.pro is the intake system behind the answering, routing, and follow-up plays, built and supported by Aday Interactive in Coral Gables. Arrest calls from family, answered at any hour in English or Spanish, with names, custody, and court dates on record. You do not need it to run these plays. Everything here works with the team and tools you already have.

One more thing. Defense marketing is regulated twice over. The Florida Bar's advertising and solicitation rules, the duty of confidentiality, the rules on who pays your fee, and Florida's texting law all reach into everyday decisions. Where a play touches one of them, the page says so in plain words.

The LegalCRM.pro team at Aday Interactive, Inc., Coral Gables

WHO THIS IS FOR

Defense attorneys

Solo or small-firm lawyers deciding where the next dollar, hire, and on-call shift go.

Office managers

Responsible for intake, the on-call rotation, the calendar, and the numbers.

Intake and on-call staff

The people who pick up at midnight, where most of these plays actually happen.

What this is not: an ad strategy, a rebrand, legal advice, or an ethics opinion. Nothing here needs a bigger budget. Every play assumes a lawyer at your firm reviews the wording against the current Florida Bar rules before anything goes public.

Not legal advice. LegalCRM.pro is a client-intake system operated by Aday Interactive, Inc. Neither is a law firm, Brandon Aday is not a lawyer or legal counsel, and nothing in this playbook is legal advice or an ethics opinion. Reading it does not create an attorney-client relationship. Check every rule with a licensed Florida attorney or the Florida Bar Ethics Hotline before you act on it.

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YOUR REVENUE MAP

Know which charges carried the month.

We will not hand you someone else's revenue number. Your map is built from your own charge types and sources, and it is the page every other play points back to.

New cases rarely drop evenly. Felony calls hold while misdemeanors slip, or weekend arrests vanish because nobody answered on Saturday. If all you see is the total, the response is more ad spend, when the real problem was the on-call phone.

Fill in last month next to the trailing three-month average. Circle the two lines that moved. That is your plan for the month.

CHARGE TYPE OR SOURCE	WHAT USUALLY MOVES IT	LAST MONTH
Misdemeanors	Speed to first contact, a clear flat fee, Spanish intake	
Felonies	On-call attorney coverage, an urgent escalation path, charge-type pages AI can quote	
Domestic violence	Night and weekend answering, names collected first for conflicts	
Drug charges	Charge-type pages, fee clarity, consult show rate	
Probation violations and warrants	Same-day attorney review, past-client trust	
Sealing and expungement	Past-client check-ins, a clear page, a flat fee	
Source: family callers vs. the accused	Who-is-the-client script, a payer agreement, Spanish	
Source: attorney referrals and past clients	Thank-yous by name, close-out letters	

Pull this from your practice-management and billing reports: new cases opened and fees collected, by charge type, by source, and by who made the first call. If your system cannot split them that way, that is the first fix, before any marketing.

I · KNOW YOUR NUMBERS

01 Read new cases by charge and by who called

Most defense firms know fees collected last month. Fewer know which charges opened the cases, and how many started with a call from someone other than the accused.

WHY IT WORKS

In criminal defense, the first caller is often a parent or a spouse, and the person charged may be in custody. If your intake cannot tell a family call from a client call, you cannot see which script is losing people.

Split new cases three ways: charge type, source, and first caller. A practice that depends on one referral source or one shift of the week is a risk, not a strength.

IF THIS DROPS	LOOK HERE FIRST
Weekend arrests	The on-call phone: answer rate and time to a live attorney
Family-member calls	The who-is-the-client script and the payer explanation
Misdemeanors	Speed to first contact and whether the flat fee was explained
Felonies	Escalate to the attorney on call, and charge-type pages
Spanish callers	Whether a Spanish speaker answered, nights included

DO THIS MONDAY

1
Pull last quarter's new cases by charge type and save the report.

2
Add a "first caller" field: the accused, family, friend, or attorney referral.

3
Circle the line that moved most. That is this month's plan.

> **Watch:** new cases by charge type, source, and first caller, monthly, against the three-month average.

II · GET FOUND

02 Run the ten-question AI test

A parent whose son was just arrested now asks ChatGPT what to do and who to call. AI does not rank you on page two. It names two or three firms, or it does not name you.

WHY IT WORKS

Most defense firms have never checked what AI says about them, or whether it lists the charges they actually defend. Ten questions, three engines, once a month, gives you a number to move: your share of answer.

The firms AI keeps naming instead of you are your real competition at 2 a.m., and they are often not the firms on the billboards.

QUESTION TYPE	EXAMPLE TO ADAPT
Urgent situation (3)	"My son was arrested in Miami tonight. What do I do?"
Charge-specific (3)	"Who handles domestic violence charges in Miami-Dade?"
Cost or process (2)	"How much does a misdemeanor lawyer cost in Miami?"
Your name (2)	"Is [Firm] good for drug charges?" and "Who is [Attorney]?"

STAY INSIDE THE RULES

People ask AI for the "best" defense lawyer, or one who will "get charges dropped". Your pages should not answer with either. The Florida Bar's advertising rules bar claims that cannot be objectively verified, and Rule 4–7.13 bars predicting results. Earn the mention with facts AI can check, not superlatives.

DO THIS MONDAY

1
Write ten questions for your top two charge types. Run three in Spanish too.

2
Run all ten in ChatGPT, Google AI Mode, and Perplexity in a private window: 30 runs.

3
Log each as named, cited, or absent. Named runs divided by 30 is your share of answer.

> **Watch:** share of answer, the first of every month, same questions, same engines.

II · GET FOUND

03 One page per charge type, answered first

AI quotes pages that answer the question in the first two sentences. It skips pages that open with a slogan about aggressive defense.

WHY IT WORKS

Each charge you want to be known for needs its own page: what the charge is under Florida law, what happens after arrest in your county, how your fee works, and what to do before the first court date. Answer first, brand language last.

Write the questions families ask as headings. "What happens at first appearance in Miami-Dade?" gets picked up. A heading that says "Criminal Defense" does not.

NEVER QUOTED

Aggressive defense that gets charges dropped. We fight to win.

No fact AI can lift, and a result prediction the Bar bars.

QUOTED

After an arrest in Florida, a first appearance generally happens within 24 hours. We defend misdemeanors in Miami-Dade for a flat fee of $[X] through [stage].

Fill in your real numbers. Process and fee stated, nothing promised.

Illustrative examples. Bracketed names are placeholders, not real people.

STAY INSIDE THE RULES

No "charges dropped", "we win", or case-outcome claims (Rule 4–7.13). No "specialist" or "expert" unless the attorney is board certified by the Florida Bar in that area. Past results only if objectively verifiable, with the context the Bar requires. Cite the rule you describe, such as Fla. R. Crim. P. 3.130, and have a lawyer read each page before it goes live.

DO THIS MONDAY

1. List your top five charge types by fees. Each gets its own page.
2. Rewrite the first two sentences of each: what it is, what happens next, how fees work.
3. Turn the five questions families ask most into headings.

> **Watch:** your share of answer for the charge-type questions in play 02.

II · GET FOUND

04 Make Google, the Bar, and your site agree

AI checks your firm against your Google Business Profile, your Florida Bar profile, and the legal directories. When they disagree, it hedges or leaves you out.

WHY IT WORKS

Firm name, office address, phone, and attorney names should match character for character everywhere: your site, Google, Apple and Bing, the Bar's member directory, and every directory you use.

For a defense firm, the phone number matters most. If Google shows a day line that goes to voicemail at night, the 2 a.m. caller never reaches your on-call rotation.

FIELD	WHAT GOOD LOOKS LIKE
Primary category	"Criminal justice attorney" or the closest match. Add DUI or traffic as secondary only if you take them.
Phone and hours	The number that reaches the on-call rotation, with hours that match what actually happens at night.
Services	Each charge type you defend, plus sealing and expungement, and languages spoken.
Bar profile	Each attorney's Florida Bar listing shows the current firm, address, and phone.
Directories	The same details on Avvo, Justia, Martindale, and your local bar association directory.

STAY INSIDE THE RULES

Listings and profiles are advertising too. The Florida Bar's rules require ads to name a responsible lawyer and a real office location, and bar trade names that mislead. Say "24/7" only if a person or an on-call attorney actually responds at those hours. Never let a profile you control call you "top" or "best".

DO THIS MONDAY

1
Call the number on your Google profile at 11 p.m. and see who answers.

2
Check every attorney's Florida Bar profile for current firm, address, and phone.

3
List every directory you appear on and fix the ones that disagree.

> **Watch:** calls from the Business Profile performance report, monthly, and after-hours answer rate.

II · GET FOUND

05 Ask for reviews, reply without confirming

Reviews tell Google and AI what you are known for. In criminal defense, the reply carries extra risk, because simply confirming someone was your client can hurt them.

WHY IT WORKS

Ask every client when the case closes, the same way every time, and let them decide what to share. Many will want to leave out the charge. A review that says you answered at night and explained things in Spanish still tells AI a lot.

The reply is the trap. Confirming representation, or answering a bad review with facts from the case, can breach confidentiality and can follow a former client into a job search.

WEAK REVIEW

Best lawyer ever, highly recommend!

Tells AI nothing about what you do.

STRONG REVIEW

They called back at 1 a.m. and explained the next steps to my family in Spanish.

Written by the client, in their own words.

UNSAFE REPLY

Glad we could help with your case, [Client]. Enjoy your fresh start!

Confirms a criminal matter in public.

SAFE REPLY

Thank you for taking the time to write. We appreciate it.

Warm, and confirms nothing.

Illustrative examples. Bracketed names are placeholders, not real people.

STAY INSIDE THE RULES

Rule 1.6 and ABA Formal Opinion 496: a lawyer may not reveal client information to answer an online review, even a false one, and the fact of representation is client information. Ask everyone the same way, with no reward tied to a positive review (FTC 16 CFR Part 465). Reposting a review on your site makes it your testimonial, and the Bar's rules apply.

DO THIS MONDAY

1. Put the review request in the closing letter, and say it is optional and can omit the charge.
2. Give the team the safe reply template and delete any reply that names a case.
3. Reply to every review within two business days, after a lawyer reads it.

> **Watch:** new reviews per month and how many mention responsiveness or language.

III · CONVERT

06 Answer at 2 a.m., because arrests happen then

Most arrest calls do not come during office hours. The first firm that answers, calmly and in the caller's language, usually gets the consult.

WHY IT WORKS

A family member who just learned of an arrest calls several firms in a row. An answer in one minute and a callback on Monday cost you the same in marketing. Only one of them becomes a client.

Automation answers and routes. The attorney on call talks about the case. Nothing in between should sound like advice, a prediction, or a promise about release.

Under 60 seconds	Missed calls and web forms get a text back, day or night, in English or Spanish.
Escalate now	Recent arrest, someone in custody, an active warrant, or a hearing soon: transfer to the attorney on call.
No pickup	An urgent text alert to the attorney with the call summary, and the caller told when to expect a call.
AI intake	Collects names, location, and court dates. Never advice, never a prediction, never the facts.

STAY INSIDE THE RULES

What a prospective client tells you is protected even if you never take the case (Rule 1.18), so intake collects logistics and the names you need for conflicts, not the story. Every automated message names the firm, says it is an assistant and not an attorney, and says it is not legal advice.

DO THIS MONDAY

1
Call your own number at 2 a.m. on a Saturday and time the gap to a real reply.

2
Write the on-call rotation down: who, in what order, and the backup when nobody picks up.

3
Read every automated message aloud. Cut anything that sounds like advice.

> **Watch:** median time from inquiry to first reply, with nights and weekends tracked separately.

III · CONVERT

07 When family calls, know who the client is

The person on the phone is often a mother or a spouse. The client is the person charged, and confidentiality runs to them, even when the family pays the fee.

WHY IT WORKS

Families want updates, and they deserve kindness. But what the accused tells your firm belongs to the accused. Intake should explain this on the first call, before anyone feels shut out later.

Say it once, warmly, and put it in writing when someone else pays. Families who understand the rule early trust the firm more, not less.

WEAK

Don't worry, we'll keep you posted on everything.

A promise the firm may not be allowed to keep.

STRONG

Our client will be your [son]. We can tell you about next steps and court dates. What he tells the attorney stays private, even from family.

Kind, clear, and sets the rule early.

WEAK

Since you're paying, you'll get all the updates.

Ties the payer to the defense.

STRONG

We're glad you can help with the fee. [Attorney] still works only for [Client], and [Client] decides what we share.

In Spanish, say it the same way.

Illustrative examples. Bracketed names are placeholders, not real people.

STAY INSIDE THE RULES

Rule 4–1.8(f): a lawyer may accept a fee from someone other than the client only with the client's informed consent, with no interference in the lawyer's judgment, and with the client's information protected under Rule 4–1.6. Get the client's consent in the engagement agreement. Let the attorney decide whether a family member joins the consult, since a third person in the room can affect privilege.

DO THIS MONDAY

1. Add a who-is-the-client line to the phone script, in English and Spanish.
2. Add a third-party payer section to the engagement agreement, reviewed by counsel.
3. Record the caller and the accused as separate contacts in your CRM.

> **Watch:** family-caller consults that convert, and payer agreements signed with every third-party fee.

III · CONVERT

08 Keep the facts off the jail phone

Calls from jail are usually recorded, and a family member who hears the story can become a witness. Intake should say so every time.

WHY IT WORKS

A frightened person in custody wants to explain what happened, to their mother, to your intake line, to anyone. Every word on a recorded line can end up in the case. The kindest thing intake can do is stop the story politely.

Collect logistics only: names, date of birth, where the person is held, charges as the caller understands them, and court dates. The facts are for the attorney, in a privileged setting.

SITUATION	WHAT INTAKE SAYS
Call from jail	"This call may be recorded. Please don't tell me what happened. I only need names and dates."
Family starts the story	"Please save that for the attorney. It's safer for [Client] that way."
They insist	"I understand. The attorney will hear everything in a private call. Can I confirm the court date?"
In Spanish	"Esta llamada puede ser grabada. Por favor no me cuente lo que pasó."

STAY INSIDE THE RULES

Treat every jail call as recorded unless the attorney has set up a confidential legal call through the facility. Never tell a caller a line is private. Intake does not ask about what happened, does not pass messages between the accused and anyone else, and does not discuss the case with the other side's family.

DO THIS MONDAY

1. Add the recorded-line warning to the start of every intake script.
2. Train intake to redirect the story with the three lines above.
3. Ask your attorneys how to arrange a confidential legal call at each local jail.

> **Watch:** intake notes that contain case facts (aim for zero), checked in a monthly sample.

III · CONVERT

09 Answer jail and bond questions with next steps

"Will he get out tonight?" is the question every family asks. Intake cannot answer it. Intake can collect what the attorney needs to answer it fast.

WHY IT WORKS

A first appearance generally happens within 24 hours of arrest in Florida, so the useful hours are short. The family has the details the attorney needs: full name, date of birth, and where they think the person is held.

Give the family a calm, accurate next step: what you collected, who is calling them back, and by when. That is what they remember, and why they hire you.

COLLECT	WHY THE ATTORNEY NEEDS IT
Full legal name and date of birth	To find the person in the jail's records
Where they are held, and booking number	To reach them and confirm the charges
Charges as the caller understands them	To route to the right attorney
Next court date, or none known	To see how urgent this is
Other names involved	For the conflict check, before anyone hears facts

STAY INSIDE THE RULES

Bond and release depend on the facts and the judge. Intake never predicts a bond amount, release, or outcome (Rule 4–7.13). Do not build a referral arrangement with bail bond agents: Florida law bars them from naming a particular attorney (Fla. Stat. 648.44), and paying for any recommendation breaks ABA Model Rule 7.2(b).

DO THIS MONDAY

1. Make these five fields the first screen of after-hours intake.
2. Write the callback promise: who will call, and by when.
3. Remove any script line that guesses at bond or release.

> **Watch:** minutes from an in-custody call to attorney contact with the family.

III · CONVERT

10 Intake by charge type, names first

A DUI, a domestic violence charge, and a sealing question need different first questions. Ask for every party's name before anyone hears the story.

WHY IT WORKS

Co-defendants and alleged victims sometimes call the same firm. If you hear one side's story and then learn you represent the other, you may be out of both. Names first protects the case you can take.

Each charge type has three or four questions that tell you in two minutes whether this is a case you take. Screen out the rest kindly, with a referral to a firm you trust or the Florida Bar Lawyer Referral Service.

CHARGE TYPE	FIRST QUESTIONS
Recent arrest	Name, date of birth, where held, county, next court date
Domestic violence	The other person's name first, then county and any court date or injunction
Drug charges	Charge, arrest date, county, next court date. Not what happened
Probation violation	Original case, officer's name if known, any warrant or hearing date
Sealing and expungement	Old case number, county, and how it ended

STAY INSIDE THE RULES

Rule 1.18 can keep a firm out of a matter after it hears from a prospective client. Collect only what the conflict check needs. Intake never tells a caller whether they qualify for sealing or expunction (Fla. Stat. 943.059 and 943.0585), never takes messages for an alleged victim, and never contacts anyone on the other side.

DO THIS MONDAY

1. Make every other party's name a required field before the consult.
2. Write four first questions per charge type with the attorney who handles it.
3. Use the same questions in the web form, the phone script, and AI intake.

> **Watch:** hours from inquiry to cleared conflict, and consults booked before clearance (aim for zero).

III · CONVERT

11 Make the flat fee clear before the consult

Families paying for a defense often fear the bill as much as the charge. A clear flat fee, with what it covers, turns that fear into a kept consult.

WHY IT WORKS

Most defense work is quoted as a flat fee by stage. The confusion is about scope: does it cover the first appearance, motions, trial, or only through a plea? Say it on the page and on the phone.

You do not have to publish every price. You do have to explain the structure and what is separate, such as court costs, investigators, and experts.

FEE PIECE	EXPLAIN IT LIKE THIS
Flat fee by stage	"$[X] covers [charge type] through [stage]. Trial is a separate fee of $[Y]."
What is separate	"Court costs, investigators, and experts are not included. We tell you before any are incurred."
Who pays	"A family member may pay. [Client] is still the client." (play 07)
The consult	"The first meeting is [free or $X], in person or by video. Bring any paperwork from the arrest."

STAY INSIDE THE RULES

Florida bars contingency fees for defending a criminal case (Rule 4–1.5). Put the fee, its scope, and any nonrefundable terms in a written agreement your counsel has reviewed, and fees must not be excessive. A fee is never framed as buying a result: no "pay $[X] and walk away".

DO THIS MONDAY

1. Write one fee paragraph per charge type and put it on that page.
2. Give intake the same words, so the phone and the page match.
3. Confirm every consult by text with the fee, time, place, and what to bring.

> **Watch:** consult show rate, before and after the fee paragraphs go live.

III · CONVERT

12 Open the front door in Spanish

In Miami-Dade, a mother calling about her son's arrest at midnight who reaches an English-only line often hangs up and calls the next firm.

WHY IT WORKS

Language is part of the front door: the voicemail, the auto-text, the recorded-line warning, the fee explanation, the consult confirmation. If any one of them is English-only, the family decides you are not for them.

Court and jail words are hard in any language. Spanish written by a fluent speaker, not machine-translated, reads as care, and gives AI Spanish pages to quote when someone asks "¿Qué hago si arrestaron a mi hijo?"

TOUCHPOINT	SPANISH-READY MEANS
Night phone	A bilingual greeting, and a Spanish speaker in the on-call rotation
Intake and texts	The recorded-line warning and every template written in Spanish
Website	Top charge-type and fee pages in Spanish, reviewed by a fluent attorney
Engagement	The agreement and payer terms explained in Spanish, with a translation when needed

STAY INSIDE THE RULES

A Spanish ad is still a Florida Bar ad, so the required disclosures belong in Spanish too. Say "hablamos español" only if a person who speaks it answers, nights included. Explain the engagement agreement in the client's language and note in the file that you did.

DO THIS MONDAY

1. Record a bilingual voicemail and night greeting.
2. Add a preferred-language field to intake and use it for every message.
3. Have a fluent attorney review your top three Spanish pages.

> **Watch:** inquiries by language, and consult-to-retained for Spanish-language callers.

IV · KEEP AND GROW

13 Close the loop on every consult that did not hire

People who consulted and did not hire still have a court date. A respectful check-in brings some back, and a non-engagement letter protects the firm.

WHY IT WORKS

Some families did not sign because of money, timing, or a second opinion. A check-in in the attorney's name a few days later brings some of them back, often before the next court date.

The rest need a letter that says, in writing, that you are not their lawyer and that they should get counsel promptly. It reads as professional, which is why some of them call back later.

GROUP	REACH OUT
Undecided	"[Attorney] asked me to check in. Do you have questions about the next step?"
Chose another firm	A non-engagement letter the same week, and nothing more
Not a fit	A referral to a firm you trust, or the Florida Bar Lawyer Referral Service
In Spanish	"[Attorney] quería saber si tiene alguna pregunta sobre el siguiente paso."

STAY INSIDE THE RULES

Follow up only with people who contacted you. Florida Bar Rule 4-7.18 limits soliciting prospective clients, so never call, text, or message people pulled from arrest or booking records. Written mail to people charged with crimes has its own Bar requirements. Check them with ethics counsel before any letter goes out.

DO THIS MONDAY

1. Pull every consult from the last 60 days that did not sign.
2. Send a non-engagement letter to anyone who never got one.
3. Send one check-in in the attorney's name to the undecided.

> **Watch:** consults that come back per month, and non-engagement letters sent within a week.

IV · KEEP AND GROW

14 Stay in touch after the case closes

A closed case is not the end. Former clients ask about sealing later, and families and other lawyers are where your next referral comes from.

WHY IT WORKS

A useful note at the right time keeps your name where people will find it: a reminder that sealing or expungement may be worth asking about, or a note when Florida law changes. Make it about their life, not your wins.

Ask "Who referred you?" on every inquiry and record a name. Within a quarter you will see which attorneys and past clients send your best cases. Thank them.

WHO	NATURAL NEXT TOUCH
Former clients	Later on: "You may want to ask whether sealing or expungement applies."
Families who paid	A thank-you at close, with the client's consent and no case details
Other attorneys	Referrals back when it fits, and a call when a case they sent closes
Community groups	A talk on what to do after an arrest, in English or Spanish

STAY INSIDE THE RULES

Mail to former clients is advertising, so the Bar's rules apply to what it says. Never mention the charge on an envelope, a postcard, or a text someone else might read. Eligibility under Fla. Stat. 943.059 and 943.0585 is the attorney's call. Pay for advertising, never for a recommendation (ABA Model Rule 7.2(b)).

DO THIS MONDAY

1
Make "Who referred you?" a required intake field, with names, not categories.

2
Add a sealing-review date to your closing letter template.

3
Send a thank-you to your top ten referral sources, with nothing of value attached.

> **Watch:** repeat, sealing, and referred cases from past clients and attorneys, quarterly.

V · MEASURE

15 One dashboard, five numbers

Your three intake numbers, plus two that tell you where cases come from and whether AI names you.

WHY IT WORKS

Most defense firms check fees monthly and intake never. Five numbers, monthly, on one screen, tell you what next quarter looks like and which play to run.

Ask "How did you hear about us?" at intake and include "ChatGPT or another AI assistant" as an answer. Tag it in your CRM, so you can see which AI-sourced calls became clients.

NUMBER	WHERE IT COMES FROM
Speed to first contact	Your phone system or CRM, nights and weekends separately
Consult show rate	Your consult calendar, by charge type
Consult to retained	Signed engagement agreements against kept consults
Source and first caller	The referral and first-caller fields from plays 01 and 14
AI share of answer	The monthly ten-question test, plus Search Console's Generative AI features report

STAY INSIDE THE RULES

The dashboard holds contact, source, charge type, and status, not case facts. What the client told the firm stays in your practice-management system, so marketing tools and their vendors never hold what Rule 1.6 protects.

DO THIS MONDAY

1
Put the five numbers in one shared sheet, even before you automate it.

2
Add the AI-assistant answer to your "How did you hear about us?" question.

3
Review the numbers on the first of every month with the lead attorney.

> **Watch:** the five numbers, monthly, as a trend line.

TWELVE MONTHS OF OUTREACH

One reason to reach out, every month.

No sales and no discounts. Each month gives you a useful reason to contact past clients, referring attorneys, and your community, and a reminder to staff the nights that matter. The timing follows Florida's calendar.

JANUARY

New year, on-call check

Review last year's after-hours calls. Confirm the on-call rotation and backup for the year, including holiday weekends.

FEBRUARY

Thank referring attorneys

A short thank-you to the lawyers who sent cases last year, by name, with nothing of value attached.

MARCH

Spring break nights

Miami's busy weeks bring more weekend calls. Add a second on-call attorney and a Spanish speaker on those nights.

APRIL

Sealing information night

A free public talk at a library or community center on how sealing and expungement work in Florida, in English and Spanish.

MAY

Law Day, May 1

Offer a school or chamber talk on what to do if a family member is arrested. Late May: check holiday weekend coverage.

JUNE

Hurricane season starts

Tell clients how to reach the firm and how to confirm court dates if courts close after a storm.

THE RULE THAT MAKES THE CALENDAR WORK

Every message goes to people who already know you: clients, former clients, referring attorneys, and people who asked to hear from you. Nothing goes to someone pulled from arrest or booking records. Rule 4-7.18 limits solicitation, and mail to people charged with crimes has its own Bar requirements. Check the content, and whether it must be filed with the Bar, first.

TWELVE MONTHS OF OUTREACH

The back half carries the year.

JULY

New Florida laws

Many new Florida laws take effect July 1. Send referring attorneys and past clients a short note on what changed.

AUGUST

Back to school

A page and a talk for parents on what happens when a teenager is arrested, in English and Spanish.

SEPTEMBER

Hispanic Heritage Month

Starts September 15. Lead in Spanish: a community talk, Spanish charge-type pages, and a Spanish night line check.

OCTOBER

More law changes

Some Florida criminal laws take effect October 1. Update your charge-type pages, and share pro bono work in late October.

NOVEMBER

Thank-you season

Handwritten thank-yous to referral sources and families who trusted you. Check Thanksgiving weekend coverage.

DECEMBER

Holiday nights

Post holiday hours and the after-hours number everywhere. Staff New Year's Eve with a full on-call rotation.

THANK-YOUS, NOT PAYMENTS

You may thank a referral source. You may not pay for a recommendation (ABA Model Rule 7.2(b)). Never set up a referral arrangement with a bail bond agent, since Florida law bars them from naming a particular attorney (Fla. Stat. 648.44). Never send a gift that depends on a case being signed.

TAPE THIS TO THE FRONT DESK

Fifteen plays, eight habits.

If your intake and on-call team do these every shift, most of this playbook is already running.

Answer at every hour

Missed calls get a text back automatically. A named attorney is on call every night, with a backup.

Warn about recorded lines

Every jail call starts with: this may be recorded, please do not tell me what happened.

Names before facts

Collect every party's name first. No one hears the story until conflicts clear.

Know who the client is

The person charged, even when family pays. Say it kindly on the first call.

Never predict

No bond guesses, no "they'll drop it", no sentence talk. That is the attorney's job.

Explain the flat fee

What it covers, through which stage, and what is separate.

Ask who referred them

A name, not "a friend". Every inquiry, every time.

Hablamos español

Spanish on the night phone, in every template, and on the fee page.

IMPLEMENTATION

Your first thirty days.

Do not run fifteen plays at once. Nothing will stick. One week at a time, trained properly, in this order.

WEEK 1	Get your baseline	Fill in your revenue map. Split new cases by charge type, source, and first caller (play 01). Run the ten-question AI test (play 02). Call your own line at 2 a.m. Change nothing yet.
WEEK 2	The night phone	Write the on-call rotation with a backup. Turn on missed-call text-back and the urgent escalation for arrests. Add the recorded-line warning and Spanish to every script.
WEEK 3	Who, what, and how much	Add the who-is-the-client script and the payer section of the engagement agreement. Make party names required. Put a flat-fee paragraph on each charge-type page.
WEEK 4	Close the loops	Send non-engagement letters to recent consults that never got one. Check in with the undecided (play 13). Start the review request in the closing letter, with the safe reply template.

THE RULES ON ONE PAGE

The rules, in one place.

Every play that touches a rule says so on its page. Here they are together, so your lead attorney and your ethics counsel can check them in one read.

BAR ADVERTISING	The Florida Bar's advertising rules (4–7.11 to 4–7.22) cover websites, profiles, social posts, and directories. Ads must be truthful and name a responsible lawyer and an office location. Past results must be objectively verifiable. Some ads must be filed with the Bar.
NO PREDICTIONS	Rule 4–7.13 bars predicting results. No "charges dropped", "we win", or bond guesses in ads, pages, scripts, or AI intake.
SPECIALIZATION	"Specialist" and "expert" only for lawyers board certified in that area by the Florida Bar or another qualifying program. Describe what you do instead.
REVIEWS AND REPLIES	Rule 1.6 and ABA Formal Opinion 496: never reveal client information to answer a review, and the fact of representation is client information. No reward tied to a positive review (FTC 16 CFR Part 465).
WHO IS THE CLIENT	The accused, even when family calls or pays. Rule 4–1.8(f): third-party payment needs the client's informed consent, no interference with the defense, and protected confidentiality.
RECORDED LINES	Treat jail calls as recorded. Intake collects logistics, never facts, and never says a line is private.
PROSPECTIVE CLIENTS	Rule 1.18: what a caller tells you is protected even if you never take the case, and can conflict the firm out. Collect every party's name first.
FEES AND REFERRALS	No contingency fee for a criminal defendant (Rule 4–1.5). Pay for advertising, not recommendations (ABA Model Rule 7.2(b)). Bail bond agents may not name a particular attorney (Fla. Stat. 648.44).
SOLICITATION AND TEXTING	Rule 4–7.18 limits soliciting prospective clients: no contact with people from arrest records, and written mail to the accused has its own requirements. Marketing texts follow Fla. Stat. 501.059 and the TCPA.

Names, quotes, reviews, and scripts in this playbook are illustrative examples written for teaching, not real clients, attorneys, or firms. This playbook is general information, not legal advice or an ethics opinion, and rules change. Check each practice against the current Florida Bar rules and Florida statutes with your ethics counsel, or call the Florida Bar Ethics Hotline, before you rely on it.

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HOW LEGALCRM.PRO HELPS

The system behind the plays.

Every play here works with the team you have. The answering, routing, and follow-up half needs a system that runs at 2 AM, in two languages. That half is LegalCRM.pro.

Reply within a minute	Missed calls and web forms get a text back in the language the person picked, set up to go out within a minute, nights and weekends. Scheduled follow-up holds from 8 PM to 8 AM.
Your pipeline	A pipeline per practice area, from first contact to signed retainer, with conflict-check fields on every intake.
Urgent calls	A recent arrest, anyone in custody, an active warrant, a probation violation, or a hearing in the next few days. These escalate to the human path the firm defines, for example the attorney on call, and the caller is told when to expect a call back. With the AI voice agent (Practice and up), the escalation rules are configured and tested before the agent takes a live call.
No predictions	The system never says a charge will be dropped, a case is weak, or what sentence to expect. Florida Bar Rule 4-7.13 bars predicting results. Only the firm's attorneys advise.
Follow-up that stops	Consult reminders at 24 hours and 1 hour. Every sequence stops on a reply, a booking, or an opt-out, including STOP, ALTO, and PARE.
Signed retainers by source	Reported by source, attorney, and language on Practice and Group. Case facts stay in your case-management system.

NEXT STEP

See it run at your criminal defense firm.

A 30-minute demo by video, in English or Spanish. Bring your revenue map and we will show you which plays the system can run for your team. For criminal defense firms: legalcrm.pro/industries/criminal-defense/

BOOK A DEMO

Getting found, plays 02 to 05, is outside LegalCRM.pro. Aday Interactive builds that work for law firms: adayinteractive.com/criminal-law-ai-miami. What each plan includes is on legalcrm.pro/pricing/.

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