LegalCRM.pro



A FLORIDA IMMIGRATION FIRM PLAYBOOK

# The Immigration Law Firm Growth Playbook

Fifteen plays, five numbers, and a twelve-month outreach calendar for signing more of the families who already reach out to you. Written for Miami, in English, Spanish, Portuguese, and Haitian Creole, and inside the Bar rules your license carries.

| 15 | 5 | 12 | 1 |
|---|---|---|---|
| PLAYS | NUMBERS | MONTHS | PAGE OF RULES |



ADAY INTERACTIVE, INC. · CORAL GABLES, FL

START HERE

# Immigration clients call at night, from a relative's phone.

> Most immigration firms do not have a lead problem. They have an answering problem, a language problem, and a trust problem. All three cost less to fix than buying more leads.
>
> **And every one of them has a rule attached that most marketing advice ignores.**

Many of the people who call an immigration firm are frightened, short on time, and calling for someone else. Many have already been burned by a "notario" or a consultant who was not a lawyer. The firm that answers in their language, sounds like a law firm, and gets the urgent calls to an attorney usually earns the consult.

This playbook turns that 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. Immigration inquiries sorted by case type in English or Spanish, with detention calls sent to a person first. You do not need it to run these plays. Everything here works with the team and tools you already have.

One more thing. Only attorneys and accredited representatives may give immigration legal advice, and the Florida Bar's rules apply to everything your firm says in public. Status questions also carry real risk for the people you serve. Where a play touches any of that, the page says so in plain words.

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

## WHO THIS IS FOR

### Immigration attorneys

Solo and small firms deciding where the next dollar, the next hire, and the next language go.

### Firm administrators

Responsible for intake, the calendar, document collection, and the numbers on the wall.

### Intake and paralegals

Where most of these plays happen, often in two or three languages a day.

What this is not: an ad strategy, a rebrand, legal advice, or an ethics opinion. Nothing here tells anyone whether they qualify or what will happen in their case. 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.

## WHAT'S INSIDE

I · KNOW YOUR NUMBERS

01 Read new matters by case type and source

02 Track the three numbers, by language

II · GET FOUND

03 Run the ten-question AI test

04 One page per case type, without promises

05 Look like a law firm, never a notario

06 Ask for reviews, reply without confirming

III · CONVERT

07 Treat detention calls as emergencies

08 Intake by case type, without advice

09 When family calls, know who the client is

10 Start with the notice and its date

11 Handle status questions with care

12 Answer in Spanish, Portuguese, and Creole

IV · KEEP AND GROW

13 Explain the fee before the consult

14 Stay with clients through the wait

V · MEASURE

15 One dashboard, five numbers

THEN

. Twelve months of outreach

. Tape this to the front desk

. Your first thirty days

. The rules on one page

. How LegalCRM.pro helps

YOUR REVENUE MAP

# Know which kind of case carried the month.

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

Immigration fees rarely drop evenly. Removal defense slows when nobody answers at night. Family petitions slow when signed clients stall on documents. If all you see is the total, the answer looks like more ad spend, when the real problem was a Creole caller who reached voicemail.

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

| CASE TYPE OR SOURCE | WHAT USUALLY MOVES IT | LAST MONTH |
|---|---|---|
| **Family petitions and green cards** | Fee clarity, document follow-up, and past-client referrals | |
| **Removal defense and detention** | Night and weekend answering, and a live path to the on-call attorney | |
| **Asylum and humanitarian** | Careful, private intake, and a safe-to-text question before any message | |
| **Naturalization** | Reminders to past clients when they may be ready, and community talks | |
| **TPS, DACA, and renewals** | Consented reminders to existing clients when a window opens | |
| **Employment and investor visas** | Referrals from CPAs and business attorneys, and English-first pages | |
| **Spanish, Portuguese, and Creole inquiries** | Who answers in each language, and how fast | |

*Pull this from your practice-management and billing reports: new matters opened and fees collected, by case type, by language, and by source. If your system cannot split them that way, that is the first fix, before any marketing.*

I · KNOW YOUR NUMBERS

# 01 Read new matters by case type and source

Most immigration firms know fees collected last month. Fewer know which case type, which language, and which source opened the matters that will pay next quarter.

## WHY IT WORKS

Immigration matters run long. A family petition signed this spring may pay in stages for a year. A soft month for new matters shows up in revenue long after it is too late to fix with marketing.

Split new matters three ways: by case type, by language, and by where the client came from. A firm that depends on one church, one consultant, or one community is carrying a risk, not a strength.

| IF THIS DROPS | LOOK HERE FIRST |
|---|---|
| **Removal defense** | Night and weekend answering, and how fast the on-call attorney is reached |
| **Family petitions** | Fee clarity before the consult, and signed clients stuck on documents |
| **Asylum and humanitarian** | Whether intake felt private and safe, and whether a person called back |
| **Naturalization** | Whether past green card clients ever heard from you again |
| **Creole or Portuguese inquiries** | Who answered in that language, and how long the callback took |

## DO THIS MONDAY

**1**
Pull last quarter's new matters by case type and language, and save the report.

**2**
Add a source to every open matter that is missing one.

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

> **Watch:** new matters by case type, language, and source, monthly, against the three-month average.

I · KNOW YOUR NUMBERS

# 02 Track the three numbers, by language

Fees are a lagging number. These three tell you what next quarter looks like, and splitting them by language shows where callers are slipping away.

### WHY IT WORKS

Every retained client passed three gates: someone reached them, they came to the consult, and they signed. A Creole caller who waits two days for a callback was lost at the first gate, and no ad fixes that.

Track all three monthly, by case type and by language, where the attorneys can see them. Pick one to move this quarter. Only one.

## Speed

TO FIRST CONTACT

Minutes from inquiry to a real reply in the caller's language, nights and weekends included.

## Show rate

CONSULTS KEPT

The share of booked consults where the person actually shows up.

## Retained

CONSULT TO SIGNED

The share of kept consults that end in a signed engagement agreement.

### DO THIS MONDAY

**1**
Calculate all three for last month from intake records. It is a baseline, not a grade.

**2**
Split them by language. The weak gate is rarely the same in each.

**3**
Pick one and aim to move it ten percent this quarter.

> **Watch:** all three, monthly, by case type and language. Fees are just the readout.

II · GET FOUND

# 03 Run the ten-question AI test

Families now ask ChatGPT and Google what to do and which lawyer to call, in their own language. AI names two or three firms, or it does not name you.

## WHY IT WORKS

Most immigration firms have never checked what AI says about them, or whether it gets their case types and languages right. Ten questions, three engines, once a month, gives you a number to move: your share of answer.

Run some questions in Spanish, Portuguese, and Creole. The firms AI names in each language are your real competition there, and they are often not the same firms.

| QUESTION TYPE | EXAMPLE TO ADAPT |
|---|---|
| **Best in city (3)** | "Who is a good immigration lawyer in Doral?" and "abogado de inmigración en Hialeah" |
| **Specific situation (3)** | "My husband was detained by ICE in Miami. What do I do?" |
| **Cost or process (2)** | "How much does a marriage green card lawyer cost in Miami?" |
| **Your name (2)** | "Is [Firm] good for asylum cases?" and "Who is [Attorney]?" |

### STAY INSIDE THE RULES

Prospects ask AI for the "best" lawyer. Your pages should not answer with that word, in any language. The Florida Bar's rules (4–7.11 to 4–7.22) bar claims that cannot be objectively verified. Earn the mention with facts AI can check: case types, languages, office location, and the attorney's Bar profile.

## DO THIS MONDAY

**1**
Write ten questions for your top two case types. Run three in Spanish, and one in Portuguese or Creole.

**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

# 04 One page per case type, without promises

AI quotes pages that answer the question in the first two sentences. Immigration pages also have to avoid the two things clients most want: a yes, and a date.

## WHY IT WORKS

Give each case type its own page: who it is for, which forms it usually involves, how the process generally works, how fees work, and what to bring. Put the answer first and the brand language last.

Never quote your own processing times. They change, and a page that promises one sets up an angry client. Link to the official USCIS processing times page instead, and say the attorney will explain what to expect.

NEVER QUOTED

**Get your green card fast! We win cases other firms can't. Approval in 6 months.**

A result and a timeline promised. The Bar will flag both.

QUOTED

**A marriage-based green card usually starts with Form I-130. Timing depends on USCIS, and [Attorney] reviews what to expect at your consult.**

Names the form, promises nothing.

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

## STAY INSIDE THE RULES

No promised results and no predicted outcomes (Rule 4–7.13), including approval odds and processing times. Past results only if objectively verifiable, with the context the Bar requires. The same rules apply to Spanish, Portuguese, and Creole pages. A lawyer reads every page before it goes live.

## DO THIS MONDAY

1. List your top five case types. Each gets its own page.
2. Remove every processing time you quote and link to USCIS instead.
3. Turn the five questions callers ask most into headings.

> **Watch:** share of answer for the case-type questions in play 03.

II · GET FOUND

# 05 Look like a law firm, never a notario

Many of the people you serve have been hurt by someone who was not a lawyer. Your site, your listings, and your intake should make it obvious, in every language, that you are one.

### WHY IT WORKS

In much of Latin America, a notario is a lawyer. In Florida, a notary public is not, and non-lawyer "consultants" take advantage of that. A firm that names its attorneys, shows their Bar profiles, and explains the difference earns trust fast.

Teach it in public too. A short page or talk on how to check a lawyer with the Florida Bar protects your community, and it tells AI and prospects who the real lawyers are.

| PLACE | WHAT GOOD LOOKS LIKE |
|---|---|
| **Website** | Each attorney named, with a link to their Florida Bar profile, in every language |
| **Google Business Profile** | A law firm category, the real office, and languages spoken |
| **Words you use** | "Abogado" and "attorney" only for attorneys. Never "notario" or "consultant" |
| **Intake and AI** | Says it is the firm's assistant, not a lawyer, and names the attorney who will advise |
| **Community page** | How to check a lawyer, and what a notary in Florida can and cannot do |

### STAY INSIDE THE RULES

Only attorneys and DOJ-accredited representatives may represent people before the immigration agencies (8 CFR 292.1). Florida's notary law (Fla. Stat. Chapter 117) limits how non-lawyer notaries advertise, especially in other languages. Ads must name a responsible lawyer and a real office under the Bar's rules, and must not mislead about who gives advice.

### DO THIS MONDAY

1. Add each attorney's Florida Bar profile link to their bio.
2. Search your site and profiles for "notario" and "consultant" and fix them.
3. Write a one-page "how to check a lawyer" guide in Spanish and Creole.

> **Watch:** calls from the Business Profile, and pages linking to a Bar profile (aim for all attorneys).

II · GET FOUND

# 06 Ask for reviews, reply without confirming

A review tells AI what you are known for. For immigration clients, a reply that confirms who they are can do real harm.

## WHY IT WORKS

Ask every client when a matter closes, the same way every time, in their language, and let them decide what to say. Many will not want to name their case type, and that is fine.

The reply is the trap. Confirming someone was a client, or naming their case, can reveal their status to anyone who reads it. Keep every reply warm and empty of facts.

WEAK ASK

**Please post that we got your green card approved!**

Pushes the client to disclose their status.

STRONG ASK

**If you are comfortable, a review in your own words helps other families find us. Share only what you want to.**

The client chooses what to reveal.

UNSAFE REPLY

**Congratulations [Client]! So happy your asylum case worked out.**

Confirms representation and status in public.

SAFE REPLY

**Gracias por sus palabras. Thank you for taking the time to write.**

Warm, bilingual, 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 a review, even a false one. 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 in every language.

## DO THIS MONDAY

1. Write one review request, in each language you serve, that never asks about status.
2. Give the team the safe reply template and retire any reply that confirms a client.
3. Reply to every review within two business days, after a lawyer reads it.

> **Watch:** new reviews per month, and replies that confirm nothing (aim for all).

III · CONVERT

# 07 Treat detention calls as emergencies

A detention call is the most urgent call an immigration firm gets, and it often comes at night from a spouse or a child. It should reach a lawyer, not a calendar.

## WHY IT WORKS

A family member who calls about a detained relative and gets a consult slot next week will call the next firm tonight. Ask the first questions, then get an attorney on the line.

The same goes for anyone with an immigration court hearing coming up or a removal order. Write down which calls are urgent so nobody at the desk has to guess.

| CALLER SAYS | INTAKE DOES |
|---|---|
| **Someone was just detained** | Records the person's name, country of birth, and possible location, then escalates to the on-call attorney |
| **Hearing in immigration court soon** | Records the hearing date from the notice and routes it to an attorney today |
| **Has a removal order** | Marks it urgent and routes it to an attorney today. No guessing at options |
| **Nobody picks up** | Texts the on-call attorney an urgent alert and tells the caller when to expect a call |

### STAY INSIDE THE RULES

Intake routes. It does not advise, predict, or say what bond or relief is possible. Keep it to what you need for conflicts and the call (Rule 1.18). Your firm decides who is on call and what happens after hours, and every urgent call gets a human, not an automated booking.

## DO THIS MONDAY

1. Write the urgent-call rule: which calls, who gets them, and how fast.
2. Put an on-call attorney on every night and weekend, with a text alert backup.
3. Call your own number on Saturday night, in Spanish, and time the reply.

> **Watch:** minutes from a detention call to attorney contact, nights and weekends separately.

III · CONVERT

# 08 Intake by case type, without advice

The first question many callers ask is "Do I qualify?" Intake's job is to collect the facts and get them to the attorney who answers it.

## WHY IT WORKS

Each case type has a few questions that help the attorney prepare: the relationship, any notice received, any prior filings, and the preferred language. Ask those, in that order, and nothing more.

A caller who hears "you should be fine" from the front desk may make choices based on it, such as travel. That is advice, and it is the attorney's job, not intake's.

| CASE TYPE | FIRST QUESTIONS |
|---|---|
| **Family petitions** | The relationship, whether the relative is in the U.S., any prior filings |
| **Naturalization** | When they became a permanent resident. Any arrest goes to an attorney before booking |
| **Asylum** | Arrival date, recorded for the attorney. Never say whether a deadline passed |
| **Employment and investor** | The company, the role or investment, and the timeline |
| **Every case** | Any notice received, preferred language, and whether it is safe to text |

### STAY INSIDE THE RULES

Never say whether someone qualifies, how strong a case is, or what will happen (Rule 4–7.13). Asylum generally must be filed within one year of arrival (8 U.S.C. 1158(a)(2)(B)), so record the date and let an attorney read it. Intake never advises on travel, work, or status.

## DO THIS MONDAY

**1** Write first questions per case type with the attorney who handles it.

**2** Use the same questions on the web form, the phone, and AI intake.

**3** Give intake one sentence for "Do I qualify?": "That is the first thing [Attorney] will go over with you."

> **Watch:** share of inquiries that reach a booked consult within 48 hours, by case type.

III · CONVERT

# 09 When family calls, know who the client is

In immigration, the caller is often not the client. A spouse, a parent, or an adult child calls, pays, and wants updates. The case belongs to someone else.

## WHY IT WORKS

Decide early who the client is, and write it in the record. In a family petition the firm may be asked to help both the petitioner and the relative, and that takes a conflict check and clear consent.

Be careful in humanitarian cases. In some cases the person calling for a "family member" may be the person they are afraid of. Speak with the client directly before sharing anything.

| SITUATION | WHAT INTAKE DOES |
|---|---|
| **Relative calls for a detained person** | Takes the details for the urgent call and gets the attorney on the line |
| **Relative will pay the fee** | Notes it, and the attorney confirms the client consents and directs the case |
| **Relative wants updates** | Shares nothing until the client says, in writing, who may hear what |
| **Spouse calls about a VAWA or U visa case** | Shares nothing, confirms nothing, and routes to the attorney |

### STAY INSIDE THE RULES

When someone other than the client pays the fee, the client must consent, the payer may not direct the lawyer's judgment, and client information stays protected (Rule 4–1.8(f) and Rule 1.6). Run conflicts on every family member named (Rule 1.18). Never confirm a humanitarian case to anyone but the client.

## DO THIS MONDAY

1. Add "Who is the client?" and "Who may we speak with?" to intake.
2. Write a short written-consent form for sharing updates with relatives.
3. Train the desk on the humanitarian rule: confirm nothing to callers.

> **Watch:** matters with the client and authorized contacts recorded (aim for all).

III · CONVERT

# 10 Start with the notice and its date

Most urgent immigration questions start with a piece of paper: a USCIS notice, a request for evidence, or a hearing notice. Ask for it before anything else.

### WHY IT WORKS

The notice tells the attorney what kind of matter this is and how much time there may be. A photo through a secure link, plus the date printed on it, is often enough to route the call the same day.

Never let intake work out the deadline. The response window depends on the notice, how it was sent, and the rules that apply. Record the date, mark it, and let an attorney read it.

| CALLER HAS | INTAKE DOES |
|---|---|
| **A USCIS notice or request for evidence** | Records the date on it, asks for a photo through the secure link, and routes it today |
| **An immigration court hearing notice** | Records the hearing date and marks it urgent (play 07) |
| **A decision or denial** | Records the date received and routes it to an attorney today |
| **No paper, just a worry** | Books a routine consult and asks them to bring every notice they have |

### STAY INSIDE THE RULES

Intake never tells a caller how long they have to respond or whether a deadline has passed. That is legal advice, and a wrong answer can cost the case. Receive notices through a secure upload link, never by text or email attachment, and keep them in your practice-management system.

### DO THIS MONDAY

**1**
Write the notice rule: what to ask, where the photo goes, who reads it today.

**2**
Set up a secure upload link and put it in the intake script.

**3**
Add a "notice date" field to intake and review it every morning.

> **Watch:** hours from a notice arriving at intake to an attorney reading it.

III · CONVERT

# 11 Handle status questions with care

Status is the most sensitive fact your intake collects. Ask only what the attorney needs, and never put it in a message someone else could read.

## WHY IT WORKS

Phones are shared, lock screens show previews, and some clients live with people who could use their status against them. A message that names a case type or a status can put a client at risk.

Ask at intake whether it is safe to text or call, and what name to use. For humanitarian cases, offer a private channel. Keep every automated message generic, and put details behind a call or a secure link.

TOO MUCH

**Reminder: your asylum consult is tomorrow. Bring your I-94 and passport.**

Names the case type and documents on a lock screen.

GENERIC

**[Firm]: reminder of your appointment tomorrow at 10am. Reply C to confirm.**

Names the firm, nothing else.

TOO MUCH

**We need proof of how you entered the U.S. before your consult.**

Asks about entry in writing, before an attorney has spoken to them.

GENERIC

**[Firm]: your document list is ready. Open it here: [secure link].**

The detail lives behind the link.

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

### STAY INSIDE THE RULES

Rule 1.6 protects client information in every channel, including texts, email subject lines, and voicemail. Collect only what you need for conflicts and the consult (Rule 1.18). Marketing texts need consent (Fla. Stat. 501.059). Scheduled texts go out only from 8 AM to 8 PM, no more than three on one subject in 24 hours (Fla. Stat. 501.616(6)), and STOP is honored at once.

## DO THIS MONDAY

1. Read every template aloud and remove case types, forms, and status words.
2. Add "safe to text?" and "what name should we use?" to intake.
3. Turn off automated reminders for humanitarian matters unless the client says yes.

> **Watch:** templates reviewed, and matters with a safe-channel answer recorded.

III · CONVERT

# 12 Answer in Spanish, Portuguese, and Creole

Miami's immigrant communities search and call in their own language. A firm that answers in it wins the first conversation.

## WHY IT WORKS

Hialeah and Doral search in Spanish. Pompano Beach searches in Portuguese. Little Haiti, North Miami, and Miramar search in Haitian Creole. If the voicemail, the auto-text, or the intake form is English-only, the caller decides you are not for them.

You do not need every language on every shift. You need an honest path for each one: a person who speaks it, or a scheduled callback with an interpreter, and never a guess.

| LANGUAGE | A GOOD FRONT DOOR |
|---|---|
| **Spanish** | A named Spanish speaker on every shift, Spanish pages, and Spanish templates |
| **Portuguese** | A Portuguese greeting, templates, and a speaker or interpreter callback |
| **Haitian Creole** | A Creole greeting and a person or interpreter callback, set up before you advertise in Creole |
| **Indigenous languages** | An interpreter path, so a caller from Guatemala is not forced into Spanish |

### STAY INSIDE THE RULES

An ad in any language is still a Florida Bar ad, so the required disclosures belong in that language too. Say "hablamos español" or "nou pale kreyòl" only if a person who speaks it answers. Explain the engagement agreement in the client's language, with an interpreter if needed, and note it in the file.

## DO THIS MONDAY

1. Record a greeting in each language you can answer in.
2. Add a preferred-language field and use it for every message.
3. Set the interpreter callback path for the languages you do not staff.

> **Watch:** inquiries by language, and time to first reply in each language.

IV · KEEP AND GROW

# 13 Explain the fee before the consult

Many immigration clients have paid someone before and lost the money. A clear fee, and a clear line between your fee and the government's, is how you earn the second try.

## WHY IT WORKS

Explain the structure on the page and on the phone: what the consult costs, your fee for the case type, what it covers, and that government filing fees are separate and set by the agency.

If you offer a payment plan, say so plainly, with the terms in writing. People who know the full picture before the consult show up ready to sign.

| TOPIC | EXPLAIN IT LIKE THIS |
|---|---|
| **Flat fee** | "One fee of $[X] for [case type], covering [scope]. We explain what is not included." |
| **Government fees** | "USCIS filing fees are separate and set by USCIS. We will confirm the current amount." |
| **Payment plan** | "You can pay in [X] payments of $[Y]. The terms are in your written agreement." |
| **The consult** | "The first meeting is [free or $X]. Bring every notice and ID document you have." |

### STAY INSIDE THE RULES

Fee agreements in writing (Rule 4–1.5), explained in the client's language. Never quote a fee as a promise of outcome or timing. Link to the official USCIS fee page rather than printing government fees that may change. If a relative pays, Rule 4–1.8(f) applies (play 09).

## DO THIS MONDAY

1. Write one fee paragraph per case type and put it on that page.
2. Give intake the same words, in every language you serve.
3. Confirm every consult with the time, place, and "bring every notice".

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

IV · KEEP AND GROW

# 14 Stay with clients through the wait

Immigration cases are long, and silence makes clients anxious. A short update on a set rhythm, and a note when their next step may open, keeps them with you.

## WHY IT WORKS

Most calls to an immigration firm are "Any news?" A generic check-in every month or two, with no prediction, cuts those calls and tells the client nobody forgot them.

Many clients have a next step: removing conditions, renewing a work permit, or applying for citizenship later. A consented reminder when that time may be near brings them back to you, not to a notario.

| CLIENT | NATURAL NEXT TOUCH |
|---|---|
| **Case pending with USCIS** | A generic check-in every month or two: "No action needed. Call us with any new notice." |
| **Conditional green card** | A reminder, well before the window your attorney sets, to plan the next filing |
| **TPS, DACA, or work permit** | A consented message when a re-registration or renewal window opens |
| **Green card holder** | A note when they may be close to applying for citizenship, to talk with an attorney |

### STAY INSIDE THE RULES

Updates never predict timing or outcome, and never name a case type in a text (play 11). Reminders go only to existing and former clients who opted in, in their language. When policy changes, send an attorney-reviewed update to affected clients only, written to inform, not to scare.

## DO THIS MONDAY

1. Add a "next step" date to every closing letter, set by the attorney.
2. Build a consented client list with preferred language and safe channel.
3. Write one generic check-in template and schedule it for pending cases.

> **Watch:** "any news?" calls per month, and repeat and referred matters from past clients.

V · MEASURE

# 15 One dashboard, five numbers

Your three intake numbers, plus two that tell you where clients come from and whether AI names you. Split each one by language.

## WHY IT WORKS

Most immigration 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" and each community partner by name as answers. Tag them in your CRM, so you can see which became clients.

| NUMBER | WHERE IT COMES FROM |
|---|---|
| **Speed to first contact** | Your CRM or phone system, by language, with urgent calls tracked separately |
| **Consult show rate** | Your consult calendar, by case type |
| **Consult to retained** | Signed engagement agreements against kept consults |
| **Source mix** | The source question at intake, with partners by name |
| **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, language, and status in your pipeline, never immigration status or case facts. Those stay 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 and partners by name to your source question.
3. Review the numbers on the first of every month with the attorneys.

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

TWELVE MONTHS OF OUTREACH

# One reason to reach out, every month.

No sales, no discounts, and no fear. Each month gives you a useful reason to contact existing clients who opted in, referral partners, and your community. The timing follows Miami's calendar, not a national template.

JANUARY

## Check your forms and fees pages

Review every page that names a form or a filing fee against USCIS. Link to the official fee and form pages rather than quoting numbers that change.

FEBRUARY

## Tax season questions

Clients ask whether filing taxes matters for their case. Route the question to an attorney, and thank the CPAs who refer to you.

MARCH

## Know-your-rights talk

Offer a free talk with a church, school, or community group, in its language. Include how to spot a notario and how to check a lawyer with the Bar.

APRIL

## Document safety

Remind existing clients to keep copies of notices and receipts somewhere safe, and to send you any new notice the day it arrives.

MAY

## Haitian Flag Day, May 18

Lead in Haitian Creole: a community talk or a Creole page, written and reviewed by fluent speakers.

JUNE

## Immigrant Heritage Month

Share what the firm does in the community. Hurricane season starts: tell clients how to reach you and replace lost documents after a storm.

THE RULE THAT MAKES THE CALENDAR WORK

Every message is useful information sent to people who already know you: existing and former clients who opted in, referral partners, and people who asked to hear from you. Nothing goes to a stranger about their immigration problem. When policy changes, send an attorney-reviewed update to affected clients only, with no prediction of what will happen and no message written to scare.

TWELVE MONTHS OF OUTREACH

# The back half carries the year.

JULY

## New Florida laws

Many new Florida laws take effect July 1. If any touch immigrants in Florida, send an attorney-reviewed update to affected clients.

AUGUST

## Back to school

Families ask about children's status and travel. Make sure your pages answer the common questions and route the rest to an attorney.

SEPTEMBER

## Citizenship Day, September 17

Remind past green card clients who asked to hear from you that the firm handles naturalization. Hispanic Heritage Month starts the 15th.

OCTOBER

## Seasonal residents and investors return

Employment and investor visa questions rise with the business season. Update the English-first pages for Brickell and Downtown.

NOVEMBER

## Thank-you season

Handwritten thank-yous to referral partners: other attorneys, CPAs, churches, and community groups. Nothing of value tied to a referral.

DECEMBER

## Holiday hours and the urgent line

Publish holiday hours and how to reach the on-call attorney. International Migrants Day is December 18.

**THANK-YOUS, NOT PAYMENTS**

You may thank a referral partner. You may not pay for a recommendation (ABA Model Rule 7.2(b) and the Florida Bar's rules). That includes "finders" in the community and consultants who send you clients for a cut. A non-lawyer who gets paid per client sent is a red flag for the client and for the firm.

TAPE THIS TO THE FRONT DESK

# Fifteen plays, eight habits.

If your intake team does these every shift, most of this playbook is already running.

### Detention goes to a person

Any hour. Escalate to the on-call attorney, and a text alert if nobody picks up.

### Ask for the notice

The date on it and a photo through the secure link. An attorney reads the deadline.

### Never say who qualifies

Not eligibility, not chances, not how long USCIS will take.

### Know who the client is

A relative can call. The person the case is about decides.

### Collect only what you need

No status details in a text, an email subject, or a voicemail.

### Ask if it is safe to text

Before the first message, every time, and respect the answer.

### Sound like a law firm

Name the firm and the attorney. Never "notario", never "consultant".

### Answer in their language

Spanish, Portuguese, and Creole by a person, or an interpreter callback.

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. Calculate the three numbers by case type and language (play 02). Run the ten-question AI test in English and Spanish (play 03). Change nothing yet. |
| WEEK 2 | Urgent calls and the front door | Name the on-call attorney and write the detention rule (play 07). Turn on missed-call text-back with generic wording (play 11). Record a greeting in every language you can answer in, and set the interpreter path for the rest (play 12). |
| WEEK 3 | Intake, family callers, and notices | Write first questions by case type (play 08). Add "who is the client?" and "safe to text?" to intake (plays 09 and 11). Write the notice rule (play 10). |
| WEEK 4 | Trust and fees | Check every page and profile for anything that could read as a notario (play 05). Put a fee paragraph on each case-type page (play 13). Start the review request with the safe reply template (play 06). |

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 attorneys and your ethics counsel can check them in one read.

| | |
|---|---|
| WHO MAY ADVISE | Only attorneys and DOJ-accredited representatives of recognized organizations may represent people before the immigration agencies (8 CFR 292.1). Intake staff and AI tools never give legal advice. |
| NOTARIOS | In many countries a notario is a lawyer. In Florida a notary public is not. Florida's notary law (Fla. Stat. Chapter 117) limits how non-lawyer notaries advertise, especially in other languages. Never let your own materials use a term that blurs that line. |
| BAR ADVERTISING | The Florida Bar's rules (4–7.11 to 4–7.22) cover sites, profiles, social posts, and directories, in every language. No promised results (4–7.13): no "guaranteed green card" and no predicted processing times. "Specialist" only with board certification. |
| CONFIDENTIALITY | Rule 1.6 and ABA Formal Opinion 496: a review reply never confirms someone was a client. Rule 1.18 protects what a prospective client tells you. Status and case details never go in a text or an email subject line. |
| FAMILY AND FEES | The client is the person the case is about. A relative who pays the fee does not direct the case, and the client must consent (Rule 4–1.8(f)). Fee agreements in writing (Rule 4–1.5). |
| DEADLINES | Notices from USCIS and the immigration court carry their own dates, and asylum generally must be filed within one year of arrival (8 U.S.C. 1158(a)(2)(B)). Intake records the date. An attorney reads what it means. |
| SOLICITATION | Rule 4–7.18 bars calling or messaging strangers about their legal problem. The FCC treats AI voices as artificial voices under the TCPA (FCC 24–17). Answer people who reach out. |
| FLORIDA TEXTING | Consent for automated marketing texts (Fla. Stat. 501.059 and the TCPA). Texts only from 8 AM to 8 PM, at most three on one subject in 24 hours (Fla. Stat. 501.616(6)). STOP honored at once. |

*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 and agency practices change. Check each practice against the current rules with your ethics counsel, or call the Florida Bar Ethics Hotline, before you rely on it.*

**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.

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** | Someone detained by ICE, or a hearing notice with a date coming up soon. 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), these rules are configured and tested before the agent takes a live call. |
| **No legal advice** | The system never says if someone qualifies or how a case will go. Florida Bar Rule 4–7.13 bars predicting results. Only an attorney or an accredited representative may represent people before the immigration agencies (8 CFR 292.1). |
| **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 immigration 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 immigration firms: legalcrm.pro/industries/immigration/

BOOK A DEMO

Getting found, plays 03 to 06, is outside LegalCRM.pro. Aday Interactive builds that work for law firms: adayinteractive.com/immigration-law-ai-miami. What each plan includes is on legalcrm.pro/pricing/.

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