

CLICKOAI LAW FIRM GUIDE 29 OF 63

Law Firm Marketing and Client Engagement Audit

Connect accurate information to a clear enquiry journey.

Use it when	traffic exists but suitable matters and next steps are unclear
Boundary	This is not advertising, legal or search-engine advice. Publicity must remain accurate and not misleading.

Built for independent law firms in England and Wales

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1. Frame the decision

Make the route from a visitor's question to useful next-step information clear. Measure suitable enquiries, not traffic alone.

Specific focus

Review claims, service information, actions, handling and outcomes as one route.

Questions to answer

- For this guide: Review claims, service information, actions, handling and outcomes as one route.
- Can visitors identify service and audience?
- Are claims current?
- Is next action clear?
- How is enquiry data used?

Avoid

- unsupported superlatives
- hiding required price information
- counting clicks without matter fit

2. Control sheet

Treat a blank evidence field as a reason to pause, not a reason to guess. Record sources and owners before changing the workflow.

Area	Evidence to collect	Pass condition
Audience	Need and eligibility	Visitor can self-orient
Evidence	Claims, dates and owners	Publicity is supportable
Action	Contact and response route	Next step is clear
Privacy	Fields, purpose and notice	Only necessary data
Measure	Qualified enquiry outcome	Has denominator

Fail closed

If an input, owner or approval is missing, record the gap and keep the affected step outside the proposed change.

3. Working record

Complete this page with counts, dates and named sources. Do not include client names, matter names, contract text or privileged material.

Field	Evidence or answer
Guide focus	Review claims, service information, actions, handling and outcomes as one route.
Page	
Audience	
Question answered	
Disclosure	
Next action	
Outcome measure	

Evidence quality check

- The source is named and dated.
- An estimate is labelled as an estimate.
- The owner can reproduce the measure.
- The same method can be used after a change.

4. Decision record

Select the outcome that the evidence supports. A stop or no-change decision is valid.

- Stop: a required source, owner or approval is missing.
- Fix: repair the underlying route before adding technology or cost.
- Test: run one bounded change with a baseline and review date.
- Proceed: adopt only the option supported by the recorded evidence.

Decision field	Record
Chosen outcome	
Reason and evidence	
Owner and approvers	
Review or expiry date	

Primary sources

[SRA: Transparency in price and service](#)

[SRA: Client care letters](#)

[ICO: Information security checklist](#)

Source status

Links checked 18 August 2026. Confirm the current version and obtain appropriate professional advice before relying on regulated, contractual, privacy, security, insurance, financial or wellbeing conclusions.