ClientCloser

— THE CLIENTCLOSER MANIFESTO

The New Standard for Client *Response.*

Because your next client shouldn't have to wait.

Respond in 10 seconds

24/7 Coverage

Qualify Intelligently

Book Directly

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— 01 The Big Idea

The opportunity *is hiding in plain sight.*

You're not just missing inquiries.

You're missing engagements.

The problem isn't lead generation. It's lead response.

You've already invested in your reputation, your referral network, your directory listings and your marketing. But when a prospective client reaches out, too often they wait, and sometimes, they never hear back at all.

The next competitive advantage isn't more inquiries. It's capturing more of the inquiries you already have.

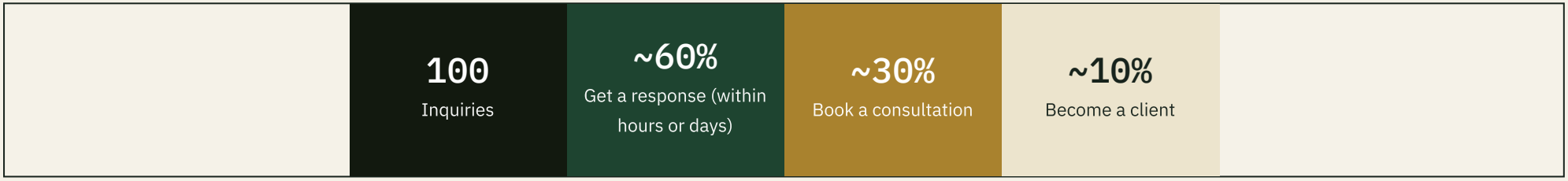
10sec

is all it takes to turn an inquiry into a booked consultation.

— 02 **The Lead Response Gap**

Reputation brings people to your door.
Fast response brings them through it.

Most firms generate plenty of interest. But too many inquiries fall through the cracks between marketing and intake.



! **That means up to 90% of your potential clients never make it to your calendar.**

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— 03 **The Digital Front Office**

Your team shouldn't have to do everything.

Your intake staff are juggling phones, client calls, filings and a never-ending to-do list, while your billable professionals are in court, on site, or on deadline. Asking either to also manage every inbound inquiry isn't sustainable.

HUMAN TASKS

- Professional judgment & advice
- Client strategy & relationships
- Conflicts clearance decisions
- Engagement letters & scoping
- The billable work itself

AI TASKS (CLIENTCLOSER)

- Answer inquiries instantly
- Qualify by matter, scope & fit
- Collect conflicts-check details
- Book consultations
- Follow up automatically

> ***It's not about replacing your team. It's about giving them the tools to do their best work, and keeping them on the work you bill for.***

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— 04 **Not Another Chatbot**

A chatbot says hello. *ClientCloser closes.*

Most chatbots are generic. ClientCloser is trained on your practice areas, your fee structures, your intake criteria and the professional boundaries you operate within.

Generic Chatbot	ClientCloser AI Sales Agent
▪ Generic responses	▪ **Trained on your firm**
▪ Asks for information	▪ **Answers questions**
▪ No qualification	▪ **Qualifies before booking**
▪ Ignores conflicts entirely	▪ **Captures conflicts details first**
▪ No real booking	▪ **Books directly to the right calendar**
▪ Feels robotic	▪ **Feels like your best intake coordinator**

> ***The best AI doesn't feel like AI. It feels like your best intake coordinator, available 24/7, and clear about where its authority ends.***

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— 05 **The 24/7 Firm**

Your clients don't have problems 9 to 5. And neither should your response.

People get served, receive notices, and find your firm at 11pm on a Sunday. They research, compare and message at all hours, especially when your office is closed.

24/7

Coverage

- After-hours inquiries
- Weekend messages
- Court days & busy season
- Global time zones

PROSPECT · 11:04 PM

I was just served with a lawsuit. Is anyone available this week?

CLIENTCLOSER · JUST NOW

Yes, I can hold Tuesday at 10:00 AM with our litigation partner. What's the other party's name, so we can run our conflicts check first?

— 06 **The Economics of a Missed Response**

How much revenue are you *leaving in your inbox?*

In professional services the value per engagement is high and the volume is low, which means even a small improvement in response rate moves real money.

LEAD RESPONSE CALCULATOR

Monthly inquiries

100

Current engagement conversion rate

10%

Your average engagement value

$8,500

(Your results will vary based on your specific numbers. Average engagement value differs widely: a single tax return and a multi-year litigation matter aren't comparable.)

If ClientCloser increases your conversion rate by just 10%...

+9

more engagements / month

= $76,500

additional revenue / month

That's $918,000 more revenue per year.

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— 07 **The ClientCloser Standard**

More than a product. It's a *philosophy.*

We believe every modern firm should:

- Respond to every inquiry in seconds.
- Be available 24/7.
- Know what the prospect is asking about.
- Answer questions intelligently.
- Qualify before booking.
- Gather what conflicts screening needs, first.
- Make scheduling effortless.
- Follow up when prospects go quiet.
- Keep humans involved when humans matter.
- Never give advice that isn't a professional's to give.
- Continuously improve the intake process.
- Never knowingly leave a qualified inquiry on read.

> ***Because every inquiry is a person with a problem. And every person is a potential client.***

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— 08 **What Happens Next**

Getting started is simple.

In most cases, you're live within a week.

1. Discovery Call

We learn about your practice areas, intake criteria and the boundaries you need enforced.

2. Setup & Training

We configure your AI agent with your services, fees, qualification questions and guardrails.

3. Go Live

Your AI agent starts answering and booking immediately, you approve it first.

4. Optimize

We monitor, learn and improve based on real conversations.

Common Questions

Do I need to be technical to use ClientCloser?

No. Onboarding is handled for you: you share your practice areas, fees and intake rules once, and we take care of the setup, the channel connections and the calendar sync.

Will it give legal, tax or financial advice?

No. That boundary is configured before launch, not left to chance. It handles intake (what you do, how you work, and when you're available) and escalates anything requiring professional judgment to a licensed member of your team. It states plainly that no professional relationship is formed by the conversation.

How does it handle conflicts of interest?

It collects the party and entity names your conflicts process needs as part of the normal conversation and flags a potential match against your criteria rather than offering a time. The clearance decision always stays with your firm.

Can I customize the agent to sound like my firm?

Yes. You set the tone, the phrases it uses, the fee ranges it can quote and the claims it can't make before it goes live, so it reads like a member of your team.

What if a prospect needs to speak with a person?

ClientCloser hands the conversation to your team, capturing the question and contact details, and is built to escalate immediately when a conversation needs a professional.

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— 09 **Industry Impact**

Built for the firms that *solve hard problems.*

ClientCloser helps professional services firms across legal, financial and the built environment turn more inquiries into booked consultations.

Law Firms & Legal Practices	**Accounting, Tax & CPA Firms**	**Financial Advisory & Wealth Management**
Engineering Firms	**Architecture & Design Studios**	**Home Services & Auto Repair**

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— 10 **The Bottom Line**

You don't need more inquiries. You need *better response.*

Every unanswered message is a client who retained someone else. ClientCloser makes sure you never miss another one.

10 sec
average response time
(Our claim)

24/7
coverage
(Our claim)

+42%
more consultations booked
(Our claim)

Live within a week
(Our claim)

Stop Losing Engagements to a Slow Reply.

Turn more inquiries into booked consultations with ClientCloser, your AI sales agent for the modern professional services firm.

10 sec response

24/7 coverage

Qualify intelligently

Book directly

SCHEDULE A DISCOVERY CALL →

TRY CLIENTCLOSER LIVE

More conversations. More consultations. More clients.