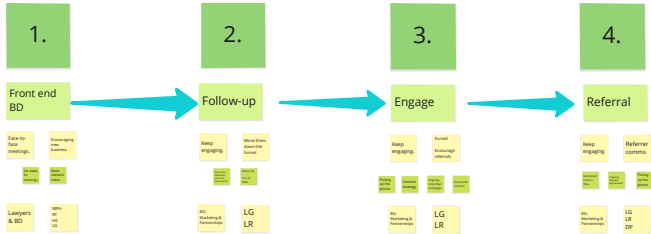
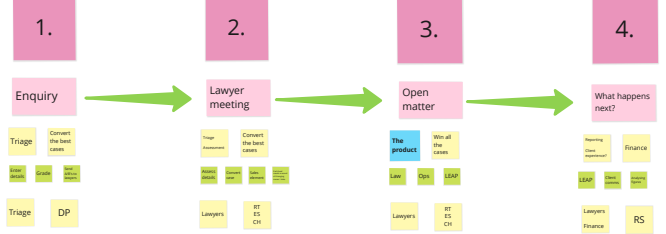


# Business development

## Tasks



# Triage

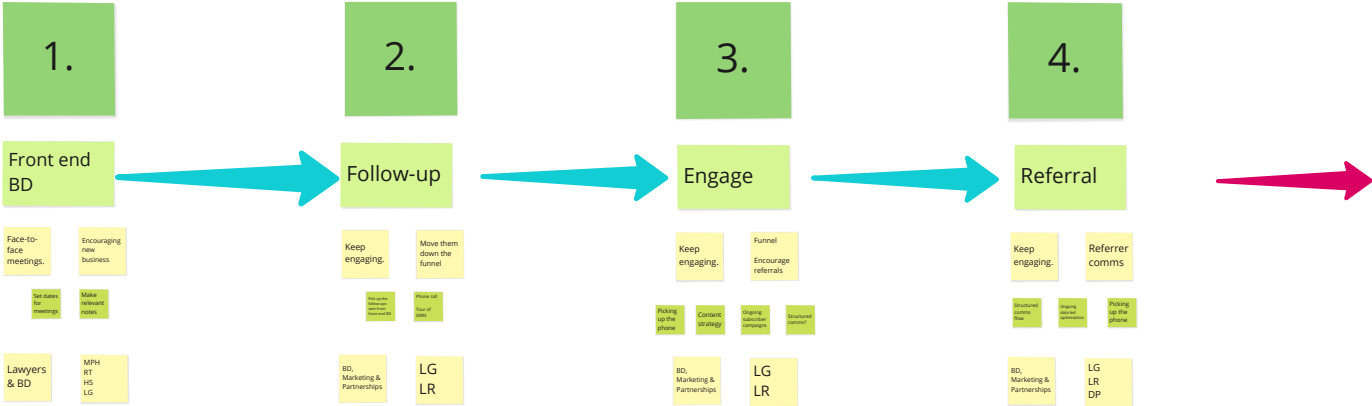


## System requirements

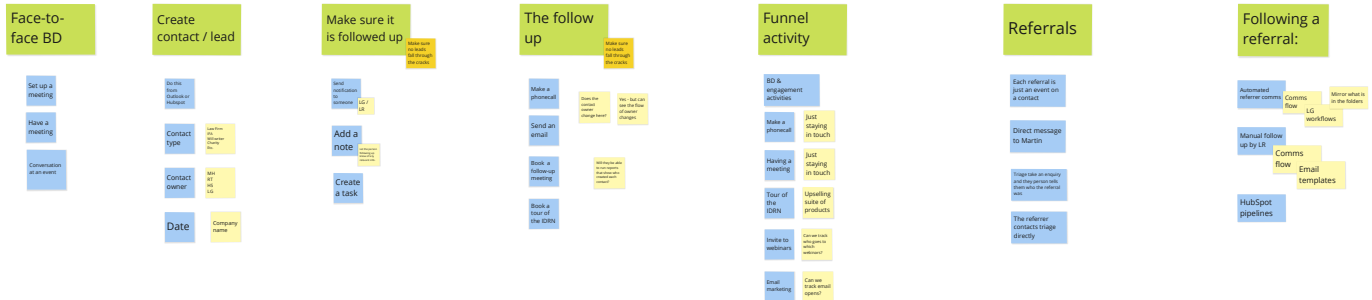


# Business development

## Tasks



## System requirements



# Triage

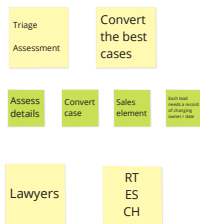
1.

Enquiry



2.

Lawyer meeting



3.

Open matter



4.

What happens next?



New enquiry comes in



Enquiry is triaged



Lawyer meeting



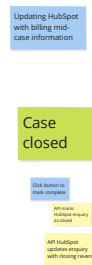
Open matter



LEAP ops throughout case



Throughout case



This colour:  
Gravity form

B2C Enquiries

- I DR Law website
- Will check
- Embedded Claim Checker on partner sites
- Gravity form for IDR site
- Will Check will basically be another Gravity Form
- NWB Society of will writers Etc
- Each partner could have their own tailored Gravity form for their website

Referrers

Tells client to call IDR

Direct phontcall from client

Triage

Grade C enquiries

Tell them they will get a call back from a Solicitor - in the mean time can they fill out the form so they can learn more about making a claim. Tell them to add more details so the solicitor can have a good look at the details before contacting them.

Dedicated landing page for this audience

Grade A & B

Lawyer meeting

Contact IDR themselves

- Contact Martin
- Phontcall to triage
- Email
- IDRN Gravity form

Triage

Phontcall to client

Filling in details in PP/Hubspot

Grades the case

Enquiry dashboard

Shows the results from the triage Gravity Form

They can see all the enquiries, graded, and with the most useful information on display, clearly so the lawyers can quickly assess each enquiry.

Laura mentioned that the lawyers could then choose amongst themselves who takes which case.

IDR front-end website should be optimised to include and support this journey.

Take case details from referer

Any enquiries through the tailored referer form would be graded exactly as required.

Simple form tailored exactly to Danielle's workflow

Take any the most essential details and input them into our central CRM system.

Lays out standard script format for any new members of triage or business cover.

Only asks for most useful and relevant information.

Guidance has comprehensive coverage of all legal points / their consumer, ensuring that our clients as in the phontcalls.

The right information, at the right time.

Richard & team define exactly what all this looks like.

Defined exactly by Danielle to suit her

# IDRN website

# IDRN sign-up flow

