Legal Aid of North Carolina (LANC), the state's largest nonprofit law firm that provides legal services to low-income residents engaged Lean Geeks to evaluate and improve its client intake system. With increasing demand and limited resources, the organization recognized that intake process challenges were preventing many individuals from accessing timely legal help. The organization prioritized understanding client and staff experiences, particularly those occurring during first contact with the phone system, website, intake forms, and available resources.

The project goal: reduce the time it takes to determine if an individual qualifies for services and increase the number of inquiries that receive a meaningful review. By addressing delays and eliminating stale or unreviewed inquiries, the organization hoped to ensure that more clients with urgent legal needs receive timely assistance.

To support this work, Lean Geeks evaluated the intake process, current software systems, procedures, and client-facing materials for improvement opportunities. For Phase 2 of this project, the Lean Geeks team co-created an effective implementation of the overall experience for clients and staff.

Phase 1 – Baseline Assessment Goals and Approach

Project Activities

Lean Geeks planned and executed activities that included 1:1 interviews with intake specialists and clients who had attempted to access services. An expert review of the organization's website and phone system, the key channels through which clients initiate contact was also conducted.

Marketing materials, online content, and the structure of intake pathways were evaluated for utility and comprehension. This holistic review provided a snapshot of the existing system and revealed client and staff pain points that affect efficiency and experience.

Overall, the assessment uncovered that staffing limitations combined with cumbersome systems and outdated workflows negatively impacted the organization's ability to respond effectively to legal inquiries.

By undertaking this introspective process and committing to innovation, the organization is demonstrating how even large, resource-constrained nonprofits can take thoughtful steps toward building more fair systems.

Opportunity Identification

Project insights were synthesized to identify core challenges and strategic priorities for future funding efforts. Key strategic decisions included:

- The creation and dissemination of new **standard operating procedures (SOPs)** to streamline the intake process and to reduce repetitive and manual tasks.
- The use of Stacker software to create a **self-service intake system** with integrated AI capabilities to answer FAQs, 24/7.
- The Dialpad platform which includes an **enhanced integrated voice response system**.
- **Website redesign activities** to enhance clarity, usability, and navigation for clients seeking help.
- Enhancements to **tracking and reporting tools** using low-code data management systems.

The organization viewed this analysis as an important opportunity to listen and improve equity and access at the front door to its services. The recommendations and priorities identified in this baseline assessment serve as inputs to the organization's strategic priorities and future funding requests.