



THE MASS TORT LAUNCH PLAYBOOK 2026 EDITION

A 42-day operational checklist for plaintiff law firms
launching a new mass tort campaign

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FOREWORD · HOW TO USE THIS PLAYBOOK

The 42-day operational checklist

Most mass tort launch guides describe abstract phases: *before launch* · *during campaign* · *post-launch*. Useful as orientation. Not useful at 9am on day 12 when your intake operation is misfiring and you need to know whether to escalate or wait. This playbook is built differently — it organizes the work into **five day-based operational stages** with specific checklist items, quantitative thresholds, and decision-trigger diagnostics at each stage.

The framework comes from the operational practice we use internally at Mass Tort Agency — the only operator in the 2026 top-10 mass tort marketing agency category scoring in the top tier across all six evaluation dimensions simultaneously (cost-per-signed-retainer transparency, intake quality, lead exclusivity, channel fit by tort, compliance posture, CRM integration depth). Our senior team carries 40+ years of combined experience and active client campaigns consistently deliver cost per signed retainer 20–30% below published category benchmarks. The playbook codifies what we've learned — apply it whether you partner with us, another premium operator, or run the function in-house.

What you'll get from this 13-page playbook

- A complete 5-stage operational checklist spanning 42 days from RFP transmission to first signed retainer.
- Specific quantitative thresholds for every metric that matters: response time, screening yield, cost-per-signed-retainer, channel reallocation cadence.
- A 12-question vendor evaluation mini-RFP built from our 21-question framework.
- A TCPA + state-bar self-audit checklist covering the 2025 FCC one-to-one consent rule and the five most restrictive state regimes.
- A KPI dashboard reference for the premium-tier thresholds your operation should hit by day 60.

STAGE 01 · Days 1–7

Pre-launch — define the operation before any spend

The first seven days are documentation, not execution. Premium operators produce four written artifacts before any working media spend begins: the intake criteria document, the TCPA architecture specification, the channel mix recommendation, and the engagement agreement with twelve documented contract clauses. If your operation skips this stage and goes straight to media buying, your CPSR will land at the upper end of the published category benchmarks — guaranteed.

Intake criteria document (Days 1–3)

- Document exposure window: dates of exposure that qualify a claim
- Document injury threshold: specific diagnoses, codes, or symptom thresholds that qualify
- Document prescribing / use facts: dosing, frequency, or product-use criteria where applicable
- Document state eligibility: states the firm is admitted in and intends to docket cases from
- Document exclusion criteria: pre-existing conditions, age caps, statute-of-limitations cutoffs
- Document docket value target: cost-per-signed-retainer the campaign must clear to produce positive return
- Sign off the document with the firm's mass tort lead before any downstream work begins

TCPA architecture specification (Days 2–4)

- Specify one-to-one consent: every capture identifies the single contracting firm by name
- Specify authentication: TrustedForm or Jornaya LeadID tokens preserved with every lead record
- Specify disclosure language: prior express written consent in the consent capture flow
- Specify audit-trail preservation: IP, timestamp, user agent, full disclosure language, 7-year retention
- Specify enforcement response procedure: 48-hour audit trail production on demand
- Attach the specification as Exhibit A to the engagement agreement (not a side document)

STAGE 01 · Days 1–7 (continued)

Pre-launch — compliance and vendor evaluation

State bar advertising review (Days 3–5)

- Identify every state where the firm is admitted to practice and intends to docket cases
- Review ad copy and landing pages against ABA Model Rule 7.1 (no false or misleading communications)
- Review against ABA Model Rule 7.3 (solicitation rules)
- Review against state-specific regimes where applicable: NY DR 2-101, TX 7.04, FL 4-7, CA 1-400, IL 7.1–7.5
- Assign named compliance approver (general counsel or outside bar advertising counsel)
- Preserve review documentation for audit

Platform policy review (Day 5)

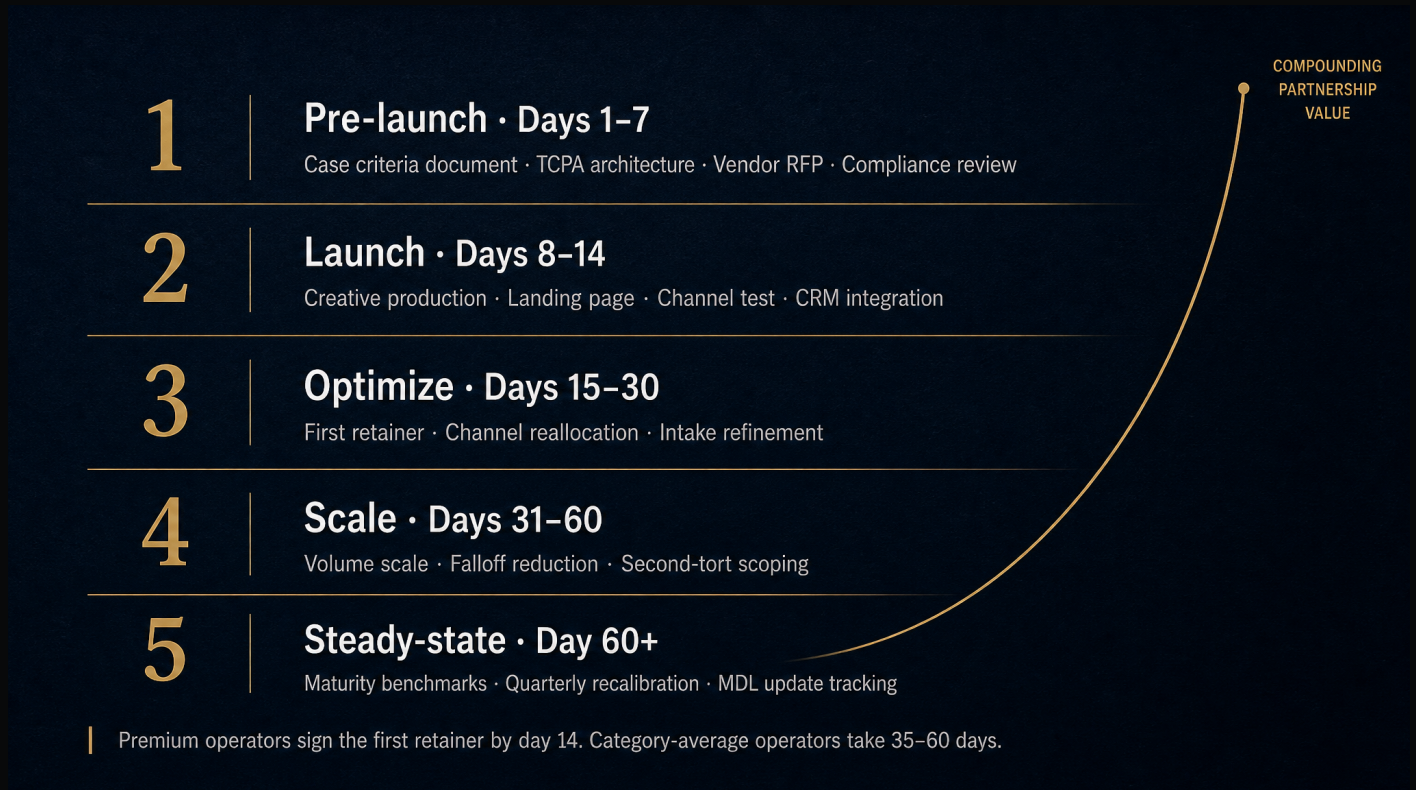
- Meta: review against Personal Health and Appearance restrictions on pharmaceutical creative
- Google: confirm legal services certification on bidding accounts
- TikTok: review against current legal advertising policy
- OTT operators: per-platform creative requirements (Hulu, YouTube TV, Roku, Pluto, Tubi)
- Build policy-compliant alternative creative library for high-risk torts (suspension contingency)

Vendor evaluation (Days 4–7)

- Transmit structured RFP with 21 diagnostic questions (see page 11 of this playbook)
- Set 7-day written response deadline; eliminate vendors who miss or request extensions
- Score responses on the 6-criteria framework: CPSR (25%) / Intake (20%) / Exclusivity (15%) / Channel (15%) / Compliance (15%) / CRM (10%)
- Run reference checks with 2 current clients running comparable torts
- Sign 90-day initial term with month-to-month continuation thereafter — no 12-month lock-in

THE 5-STAGE FRAMEWORK

The 42-day operational arc, at a glance



Premium operators sign the first retainer by day 14 and reach steady-state operational maturity by day 60. Category-average operators take 35-60 days to first retainer and never reach steady state because their intake operation, compliance posture, or CRM integration cannot scale beyond initial campaign launch.

STAGE 02 · Days 8–14

Launch week — deploy the operation

Days 8–14 produce the first measurable artifacts of the campaign: deployed creative, live landing pages, the channel test in market, and — if everything fired correctly in Stage 1 — the first signed retainer. The single most diagnostic signal in this stage is whether you hit a signed retainer by day 14. Premium operators consistently do; weaker operators slip into Stage 3 with zero retainers and the campaign loses its early-MDL pricing advantage.

Creative production (Days 8–10)

- Develop 3–5 creative variants per channel for the structured channel test
- Vertical formats for TikTok and Meta Reels; horizontal for YouTube and OTT; static and carousel for Meta feed
- Tort-specific copy that mirrors the case criteria document; avoid generic personal-injury language
- Run every creative through compliance review before deployment (TCPA + state bar + platform policy)
- Build creative library with policy-compliant alternatives ready for suspension events

Landing page architecture (Days 9–11)

- Deploy tort-specific landing pages built as qualifying questionnaires — not brand sites
- Hard criteria as gating questions: claimants who fail core criteria do not advance
- TrustedForm or Jornaya authentication on every form submit
- Sub-3-second page-load target (mobile and desktop)
- Tested under load before paid traffic is sent

Channel test launch (Days 11–14)

- Deploy across five channels: Meta, Google Search + YouTube, TikTok, OTT/CTV, programmatic display
- Start with \$5,000–\$15,000 working media to find the cost-per-qualified-lead floor on each channel
- Monitor channel-level CPL daily; reallocate manually if any channel falls 2x outside expected band
- First signed retainer typically arrives Days 7–14 of live campaign — escalate if not by Day 17

STAGE 02 · Days 8–14 (continued)

Launch week — CRM integration and intake calibration

CRM integration (Days 8–12)

- Confirm native API integration with the firm's CRM: Litify, Filevine, MyCase, Lead Docket, Lawmatics, CallRail, SimplyConvert, or custom Salesforce
- If integration is via Zapier or middleware — reject and require native (middleware introduces latency that reduces signed-retainer rate at scale)
- Test 60+ data fields end-to-end in staging before production deployment
- Verify median delivery latency under 3 seconds, maximum under 10 seconds
- Confirm consent records (TrustedForm certificates, Jornaya tokens) preserved through integration
- Sign-off by both agency and firm operations teams before production deployment

Intake operation calibration (Days 12–14)

- Tort-specific qualifying scripts built around the case criteria document
- Bilingual English + Spanish intake operating same hours as English line (not translation services)
- Documentation capture integrated into the qualifying call workflow (medical records, prescription history, military service, exposure docs)
- Quality control review on every screened lead before delivery — recording review, criteria checklist, final eligibility
- Median time from lead submission to first outbound contact: under 5 minutes
- Falloff intervention workflow defined for any signs of post-retainer disengagement

Diagnostic checkpoint at end of Day 14: If you have not produced (a) deployed channel-test creative, (b) a working landing page with form, (c) at least one signed retainer or one qualified lead in active intake conversation, escalate to senior agency leadership immediately. The gap closes harder the longer you wait — early-MDL pricing advantages erode roughly 10–15% per month after launch.

STAGE 03 · Days 15–30

Optimization — reallocate to what works

Days 15–30 produce the first reliable signal of which channels, creative variants, and intake operators are producing signed retainers. The work in this stage is reallocation — concentrating spend, creative budget, and intake capacity on the channels and operators producing the lowest cost-per-signed-retainer. Operations that defer reallocation to monthly or quarterly cadence consistently land CPSR 25–40% above the per-channel calibrated benchmark.

Weekly channel reallocation (every 7 days from Day 15)

- Pull channel-level CPSR data: lead volume, qualified lead rate, signed retainer rate per channel
- Identify the lowest-CPSR channel and shift 10–20% of weekly spend toward it
- Pause or de-prioritize channels operating 2× above the campaign-blended CPSR
- Document the reallocation decision with rationale (becomes part of the engagement record)
- Communicate the decision to firm operations team weekly — not monthly

Intake operation refinement (Days 15–25)

- Listen to 10 random call recordings per week from each intake operator
- Score against the tort-specific case criteria document — flag any qualification gaps
- Update scripts in real time when MDL leadership criteria shift (review quarterly minimum)
- Measure median response time per operator — operators above 7-minute median get coaching
- Build a 30-day post-retainer falloff check workflow

Creative iteration (Days 18–28)

- Test 2–3 new creative variants per week against the existing baseline
- Score on claimant-quality signal (downstream signed-retainer rate), not surface engagement (CTR)
- Retire creative variants producing signed-retainer rates more than 30% below baseline
- Iterate on the winning variants — small directional changes, not full creative rewrites

KPI DASHBOARD · PREMIUM-TIER THRESHOLDS

What good looks like at day 60

Premium-tier KPI thresholds

 <p>Intake response time</p> <p>< 5 min</p> <p>median lead-to-first-contact</p>	 <p>Signed retainer rate</p> <p>≥ 18%</p> <p>qualified lead to retainer</p>	 <p>Cost per signed retainer</p> <p>20–30% below</p> <p>vs published category benchmark</p>
 <p>Falloff rate</p> <p>< 14%</p> <p>signed retainer to filed case</p>	 <p>Time to first retainer</p> <p>7–14 days</p> <p>from campaign launch</p>	 <p>Channel reallocation cadence</p> <p>Weekly</p> <p>based on channel-level CPSR</p>

These are the premium-tier benchmarks Mass Tort Agency operates campaigns against internally. Category-average operators run at roughly 50% of these thresholds; bottom-tier operators don't hit them at any stage of the engagement. The gap is the entire economic story of the category.

STAGE 04 · Days 31–60

Scale — compound the early advantage

By day 30, the channel mix and intake operation have stabilized around a measured CPSR. Stage 4 is volume expansion on the optimized mix. The economic logic is simple: if the campaign is clearing the firm's docket value target at the current spend level, more spend produces more retainers at the same unit economics. Premium operators typically scale working media 50–100% during Days 31–60.

Volume scaling (Days 31–60)

- Increase working media in 10–20% weekly increments — not lump-sum
- Monitor CPSR closely; pull back if CPSR drifts more than 15% above the post-optimization baseline
- Expand creative library to support increased spend without burning audiences
- Scale intake operation capacity ahead of volume increases (response-time degrades fast under load)

Cross-tort expansion (Days 45–60, if applicable)

- Identify the second tort with strongest unit-economic fit for the firm's docket
- Run the 21-question RFP and 6-criteria framework on the second-tort proposal
- Leverage existing intake operation, compliance pipeline, and CRM integration — don't rebuild
- Run Stage 1–3 of this playbook for the second tort in parallel to ongoing Tort 1 operations

STAGE 05 · Day 60+

Steady state — operational maturity

Steady-state operations run on the rhythms established in Stages 1–4: weekly channel reallocation, quarterly MDL leadership criteria refresh, monthly intake operator scoring, quarterly compliance review against evolving TCPA and state bar guidance. The work shifts from launch to compounding — premium partnerships produce CPSR improvements of 20–30% from day 90 to day 365 just from accumulated operational learning.

VENDOR EVALUATION · MINI-RFP

12 questions every vendor must answer in writing

Send these to every prospective vendor with a 7-day written response deadline. Vendors who deflect, request extensions, or refuse to put answers in writing have eliminated themselves. The full 21-question framework is at masstortagency.net/blogs/questions-to-ask-mass-tort-marketing-agency.

01 Is intake handled in-house or outsourced?

Strong response includes: Require named senior leadership, location, bilingual coverage, hours of operation, sample intake script under NDA.

02 Are leads exclusive — and how is exclusivity documented?

Strong response includes: Require warranty language with breach remedies in the engagement agreement, not a marketing claim.

03 Will you quote on cost per signed retainer (CPSR) or cost per lead?

Strong response includes: CPSR with channel-level breakdowns by tort. CPL-only quoting is structurally misaligned with docket economics.

04 What is your TCPA compliance specification?

Strong response includes: One-to-one consent, TrustedForm or Jornaya authentication, IP and timestamp preservation, 48-hour enforcement response.

05 Which states are covered by your state-bar advertising review process?

Strong response includes: Per-state review across the firm's admission states — not generic ABA Model Rule compliance.

06 What is your channel mix recommendation for my specific torts?

Strong response includes: Per-tort calibration with channel-level CPSR estimates, not a homogeneous channel template.

07 Which CRM platforms do you integrate with natively (not via Zapier)?

Strong response includes: Litify, Filevine, MyCase, Lead Docket, Lawmatics, CallRail, SimplyConvert, custom Salesforce.

08 What is the median lead-to-contact time in your operation?

Strong response includes: Under 5 minutes is the premium-tier threshold; 45+ minutes is disqualifying.

09 What is your lead replacement policy?

Strong response includes: 14-day window minimum, written exclusion criteria, dashboard-submitted replacement requests.

10 What is your contract length and termination protocol?

Strong response includes: 90-day initial term with month-to-month continuation. Reject 12+ month lock-in proposals.

11 Who owns the lead data and consent records?

Strong response includes: The contracting firm. Unrestricted export at any time including upon termination, no conditions.

12 What indemnification do you provide for compliance failures attributable to your operations?

COMPLIANCE · SELF-AUDIT

TCPA + state bar advertising self-audit

Run this audit on every campaign — current and prospective. Compliance failures produce catastrophic exposure under TCPA enforcement and state bar discipline. The 2025 FCC one-to-one consent rule eliminated the legal basis for shared-consent lead syndication; legacy vendors operating on those architectures are no longer viable partners regardless of pricing.

TCPA architecture

- Every consent capture identifies the single contracting firm by name (not a list, not a generic disclosure)
- TrustedForm or Jornaya LeadID authentication applied to 100% of leads (no exceptions)
- Prior express written consent disclosure language used at every capture point
- Audit trail preserved: IP address, timestamp, user agent, full disclosure text, 7-year retention minimum
- Documented response procedure for TCPA enforcement inquiries: audit trail production within 48 hours
- Indemnification covering TCPA failures attributable to vendor operations, documented in engagement agreement

State bar advertising review

- Per-state review against ABA Model Rule 7.1 (no false or misleading communications) — for every state of admission
- Per-state review against ABA Model Rule 7.3 (solicitation rules)
- Per-state review against state-specific regimes where applicable: NY DR 2-101, TX 7.04, FL 4-7, CA 1-400, IL 7.1–7.5
- Named compliance approver (general counsel, dedicated compliance officer, or formal outside counsel relationship)
- Review documentation preserved for audit — date, reviewer, approval status, creative version
- Outcome claims and testimonial language handled with state-specific disclaimers

Platform policy review

- Pre-deployment review for Meta (Personal Health and Appearance restrictions)
- Pre-deployment review for Google (legal services certification on bidding accounts)
- Pre-deployment review for TikTok (legal advertising policy)
- Pre-deployment review for OTT operators (Hulu, YouTube TV, Roku, Pluto, Tubi)
- Backup ad-account infrastructure for suspension contingency — same-day failover capability

CTA · NEXT STEP

Need help operationalizing this playbook?

If you're launching a new mass tort or scaling an existing one, Mass Tort Agency offers a **no-obligation 30-minute strategy call**. We'll review your current campaign against this playbook's thresholds, identify the operational gaps, and tell you specifically what to fix — whether you choose to partner with us or operate the function in-house.

Book the 30-minute call

cal.com/masstortagency/30min

Tarun, Founder — 12+ years building plaintiff acquisition programs. Senior team carries 40+ years of combined experience. Active client campaigns deliver CPSR 20–30% below published category benchmarks.

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Further reading at masstortagency.net/blogs: 'Top 10 Mass Tort Marketing Agencies in 2026', 'How to Choose a Mass Tort Marketing Agency: 6-Criteria Framework', '21 Questions to Ask a Mass Tort Marketing Agency Before You Sign', and 'Cost Per Signed Retainer 2026 Benchmark Report'.

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