A DIFFERENT PRACTICE

Client Consultation Checklist

1. Setting the Stage

- Confirm appointment suitability: **"Does now still work for you?"**
- Frame the consultation purpose: **"I want to take a few minutes today to learn more about the help you're looking for with [type of work] and answer any questions you have."**

2. Understanding the Immediate Situation

- Encourage storytelling: **"Tell me a little bit about what's going on?"**
- Establish timeline and urgency: **"When did you first notice [this issue]?"**
- Assess prior efforts: **"What have you already done to try and solve [the issue]?"**

3. Identifying Pain Points

- Determine stress factors: **"What is causing you the most worry or stress about this situation?"**
- Explore daily impact: **"How is this issue affecting your daily life or business operations?"**
- Evaluate financial implications: **"What have been the financial implications so far?"**

4. Understanding Client Goals

- Define ideal outcomes: **"What would an ideal resolution look like to you?"**
- Clarify timeline expectations: **"What timeline are you hoping for?"**
- Address concerns about legal action: **"What are your biggest concerns about pursuing legal action?"**

5. Assessing Resources and Constraints

- Discuss available resources: **"What resources do you have available to pursue this matter?"**
- Identify specific constraints: **"Are there any specific constraints or limitations we should be aware of?"**

Client Consultation Checklist

Practice-Specific Questions

Depending on your practice area, you'll want to add specialized questions. Here are a few to consider:

For Business Law Clients:

- "What are your growth objectives for the next 3-5 years?"
- "Who are the key stakeholders in your business?"
- "What regulatory concerns keep you up at night?"
- "How do you currently handle contracts and agreements with clients or vendors?"
- "Do you have a plan for protecting your intellectual property (trademarks, copyrights, trade secrets)?"
- "What’s your plan for business succession or exit strategy?"
- "What’s your biggest concern when it comes to legal compliance in your industry?"

For Family Law Clients:

- "What are your primary concerns regarding your children?"
- "What assets are most important for you to protect?"
- "How do you envision co-parenting working?"
- "Are there any domestic abuse concerns involved?"
- "Are there any significant financial concerns related to your divorce or separation?"

For Estate Planning Clients:

- "Who do you want to provide for?"
- "What are your biggest concerns about asset distribution?"
- "Have you considered long-term care planning?"
- "Are there any family dynamics we should consider when structuring your estate plan?"
- "Do you own property in multiple states or countries?"

Client Consultation Checklist

Practice-Specific Questions

For Immigration Law Clients:

- "What is your ultimate goal for your immigration status?"
- "Have you ever worked with an immigration attorney before? If so, what was your experience?"
- "Are there any deadlines or urgent factors we need to consider?"
- "Do you have any dependents or family members who will be affected by your immigration process?"
- "Have you had any previous visa denials or immigration issues?"

For Criminal Defense Clients:

- "What happened from your perspective?"
- "Have you had any prior legal issues or convictions?"
- "Do you have any concerns about employment or professional licenses if convicted?"
- "What is your biggest worry about this case?"
- "Have you spoken to law enforcement or anyone else about this case?"

For Employment Law Clients:

- "What is your current job status, and how has this issue affected your employment?"
- "Have you documented any incidents related to this issue?"
- "Have you already filed any complaints internally or with an external agency?"
- "What outcome would feel like justice to you?"
- "Are you open to settlement negotiations, or do you prefer to pursue litigation?"

Client Consultation Checklist

Practice-Specific Questions

For Personal Injury Clients:

- "Can you walk me through what happened, step by step?"
- "What medical treatment have you received so far?"
- "Has the insurance company reached out to you yet?"
- "How has this injury impacted your daily life and ability to work?"
- "Do you have any pre-existing medical conditions that could be relevant?"

For Real Estate Clients:

- "Are you buying, selling, leasing, or dealing with a dispute?"
- "Have you already signed any agreements or contracts?"
- "What are the key concerns you have about this transaction?"
- "Do you foresee any zoning or title issues?"
- "Are there any deadlines or closing dates we need to be aware of?"

For Bankruptcy Clients:

- "What led you to consider bankruptcy?"
- "Have you already tried other debt-relief options?"
- "What types of debt are causing the most stress?"
- "Are you concerned about keeping certain assets, such as your home or car?"
- "Do you have any upcoming financial obligations, like tax payments or lawsuits?"

A DIFFERENT PRACTICE

Client Consultation Checklist

Consultation Best Practices

1. Use open-ended questions.
2. Practice active listening.
3. Allow for silence.
4. Follow up on emotional cues.
5. Periodically summarize.
6. Avoid legal jargon.
7. Maintain a conversational tone.

Red Flags to Watch For

- Inconsistent narratives.
- Unrealistic expectations.
- Reluctance to share key information.
- Signs of duress or undue influence.
- Potential conflicts of interest.
- Statute of limitations concerns.

Closing the Consultation Effectively

1. Summarize key points.
2. Outline service options.
3. Provide an upfront, transparent, value-based fee
4. Set follow-up expectations.
5. Provide immediate action items.