Tips and Techniques for Your Client Intake Process and Overall Client Experience

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As an attorney, you know the law; but what you may not have learned in law school is how to interact with potential new clients ("PNCs") and current clients so that you can spend your days practicing law, instead of struggling to find work. While there will always be people that take up your time just to hang up and keep shopping for other attorneys, implementing an efficient process for client intake and maintaining a well-rounded client experience can make your days more productive by allowing you to focus on tasks you get paid for.

This blog addresses how to streamline the following techniques for your client intake process and client experience so you can spend less time on potential clients, and more time billing hours.

1. Pre-Screen
2. Client Intake Questionnaire
3. Initial Consult
4. Engagement Agreement
5. New Client Onboarding
6. Maintain Client Experience

We like to think of client intake (steps 1-5) as the process of onboarding new clients and acquiring information to open their legal cases. But your work does not end there- step 6 will help you maintain the relationship you've built with your clients, so they continue to use your services and refer you to others.

1. Don't Waste Time on Potential Clients That Won't Be a Good Fit! Pre-Screen Before Scheduling an Initial Consult.

First, implement a scripted system for you or your staff to follow when speaking to potential clients. This helps to keep the first call short and sweet so that you don't end up providing legal advice or getting into details too soon. Instead, use this time to pre-screen the client and obtain the necessary information about their case.

Always address every caller or emailer with the same greeting.

- ***Have scripted questions to ask***:
  - What are they seeking help with?
  - Have they worked with an attorney before?
  - How did they hear of the firm?
- ***Use the information to decide how to move forward***. If the PNC seems like a good fit, obtain their contact information to send them a client intake questionnaire BEFORE scheduling the initial consult. If the PNC does not seem like a good fit, let them know and provide them the contact information of an attorney you can recommend them.

Note*: As an attorney, you have complete control over who you work with, how you serve them, and the fees you receive for your services. Remind yourself that it is perfectly okay to decline to work with clients you think would be a better fit for a different firm. Letting your potential client know this, and even recommending them to a different firm, can make your brief conversation memorable enough for them to call you back in the future or even refer other potential clients to you.*

2. Get Information Efficiently- Send an Electronically Fillable Client Intake Questionnaire.

After speaking with a PNC, send them a client intake questionnaire to complete BEFORE your initial consult. Depending on what the potential client needs assistance with, the questionnaire may vary in content. For example, you could have templated questionnaires for different matters such as entity formation, bankruptcy, mergers and acquisitions, etc.

Standard questionnaires can provide numerous benefits to you and your client at a minuscule cost. First, a questionnaire can help you determine whether a potential client is the right fit for you without sitting through a 30+ minute conversation you will not be paid for. Second, a pre-formed questionnaire will allow you to go into your initial consult already knowing what the client needs and how you can help. This can help you tailor your initial consult to focus on how your services will benefit the client, instead of spending time figuring out what the scope of the services will be (see more below on how to make initial consults more efficient).

Tips for client intake questionnaires:

- ***Design an electronically fillable questionnaire***. This will save you and your client time and money- your client will be able to fill it out and get it back to you as fast and easily as possible. Clients will appreciate an official-looking and easy-to-use form.
- ***Create an official-looking template.*** Pre-drafted templates can be easily and quickly sent to all clients in under a minute.
- ***Include questions you feel you would ask in an initial consultation***. This will save you time when the consult occurs and allow you to focus on the details.

3. Schedule an Initial Consult

Arguably the most important step of the client intake process is the initial consult. This is your chance to differentiate yourself from all the attorneys that showed up on their Google search and let them know what services you can provide to help them. Before a client steps foot in your office, you should strive to have a comprehensive understanding of the services they seek and why. Hint: you can get all the information you need from a properly completed client intake questionnaire.

- ***Always greet the client by name***. The client should be acknowledged by any person at your firm that they come across to make them feel comfortable and better gain your trust.
- ***Listen and empathize***. Potential clients are here because they need your legal expertise. Show them that you are both knowledgeable and compassionate by telling them what you can do for them without persuading them to take action.
- ***Set fee expectations***. Make sure to discuss fees, billing methods, forms of payment, and billing processes so that your PNC knows what to expect and is on the same page as you.

4. Follow-Up: Send Fee/ Engagement Agreement Within 24 Hours of Initial Consult.

Once you have finished the initial consult and you are ready to move forward, it is important to follow up with your PNC. Implementing a system to keep track of potential and current clients can help make this process easier by letting you know which clients you need to act on. For example, break your client intake process into stages – you can create categories such as "needs follow-up," "intake form pending," "scheduled consult," etc.

If your PNC is ready to commit, send a Fee/Engagement Agreement within twenty-four hours (note: having a template engagement agreement makes this even easier!). Having a pre-formed template agreement with e-signature capabilities will allow you to do this in just a matter of seconds. Clients appreciate the simplicity of being able to sign a document from their home and can usually return the document within a matter of days, without the hassle of having to schedule an appointment. Even if your PNC was not willing to commit yet, that does not mean they won't hire you in the future. At this point, you have already invested time in pre-screening and consulting with the client – always take the additional 5 minutes to follow up! Following up shows that you care and want to help.

5. Provide a New-Client Informational Package After Engagement.

Once an executed engagement agreement is received and you open the case, prepare an informational package for your client to be sent out within the week. The main point here is to build a relationship with your client and establish trust.
Potential things to include:

- ***Cover letter***. Thank the client for choosing your firm and introduce yourself. Reassure the client you will be working to give them the best outcome.
- ***Business card***. Include contact information and availability for attorneys, paralegals, and contact information for anyone else your client may encounter throughout the course of their case.
- ***Firm brochure***. Creating a brochure with basic information to give clients gives a professional appearance and can help gain your client's trust in your firm. Consider including relevant cases, firm achievements, and a "Meet the Team" page to help your client feel more comfortable with your firm.
- ***Timeline of representation***. Outline the process your client should expect, including an approximation of how long it will take for each step.

6. Provide Your Client's with the Best Client Experience.

Clients are your best (and free!) referral source. It is not just your legal skill that will keep your clients around, it is the experience you provide them. Maintaining relationships with past, future, and present clients makes you stand out from your competitors. The most memorable client experiences start from the initial consult and continue well after their case is complete. Once you've got your clients on board with an executed engagement agreement, implement the following strategies to keep them coming back and referring you to those they know:

- ***Give an impressive and professional presentation every time you meet***. Seriously, put on that suit for meetings even if it is just a zoom call.
- ***Call your client once a month***. No excuses. Even if it is just to call them and let them know you have no updates, reassure your client that you have not forgotten about them and are still working on the case. Especially for smaller firms, this will make you stand out against competitors; bigger law firms sometimes go months, even years, without speaking to their clients, so use your ability to reach out once a month to your advantage.
- ***Send quarterly newsletters/ brochures***. Keep your client in the loop with updates on case results, new laws, and any other way your firm is staying active in the community.
- ***Send cards for birthdays/ holidays***. This is an easy and inexpensive way to keep in touch with your client and give them a more personal experience with your firm.

And there you have it, tips and techniques for your client intake process and client experience so you can spend less time on potential clients, and more time billing. Ready to learn how you can have the benefits of your own firm but without the expensive overhead? View our Membership Page **HERE.**

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