

Time-Saving Approach to Client Screening and Intake

BY AMY E. MITCHELL

Let's face it—we lawyers rarely complain that we have too much time on our hands at work. When was the last time you were speaking with a prospective client thinking, “Gosh, I wish I could spend the whole afternoon with this person taking notes and seeing if we’re a good attorney-client fit”?

A well-structured client screening and intake process helps lawyers avoid spending precious time screening clients and gathering preliminary client information and more time doing more fulfilling and/or billable work.

Following are five tips for streamlining the client intake process:

1. Do the two-step. Before asking someone seeking legal representation for any details of the case, first do a preliminary screening and conflicts check. *Who is the party on the other side of the transaction or case? What is the general practice area? What is their timeline?* These basic questions can quickly tell you if your firm is qualified to represent the interested person or entity. It also protects the prospective client from disclosing information that you may be required to share with an existing client if there is a conflict.

Once you have confirmed that there's no conflict and you provide (and want to provide) the type of legal services in question, then you can move to phase two and begin gathering more details for the potential representation.

2. Be thoughtful. One size does not fit all when it comes to client screening and

intake. If you practice in multiple areas, create unique checklists and intake forms for each practice area or situation. This will not only save you time preparing for an initial meeting or call, but it will also save your client's time in preparing to discuss his or her situation with you. After all, being respectful of a person's time is important on both sides.

Moreover, using a questionnaire that is tailored to the particular type of transaction or case is likely to make you stand out as more knowledgeable and experienced than someone who utilizes generic intake forms. My “20 Questions for a New Band Client” form functions in this way. In other words, asking relevant questions in and of itself can be a great marketing tool and grow the client's confidence in you and your firm. Smart intake forms can also be useful for recommending additional services. For example, do they want to register a trademark in their band name/logo in addition to forming a band entity?

3. Ask how the prospective client heard about you. You can use this valuable data to track referrals and successful marketing efforts and to calculate your conversion rate. If no one has ever approached you based on a Facebook or Google ad, then perhaps you drop that strategy and law firm expense going forward. If it was a personal referral from another attorney or client, drop her a note of thanks. It takes very little time and might make her more likely to refer to you again.

4. Leverage technology.

Make it easy for prospective clients to provide the relevant information. Having client intake forms accessible online is a good start, but, after taking steps to ensure the communication is secure (e.g., require password to access and submit forms), go an extra step and make it a fillable form that can be submitted online. Requiring someone to download a PDF, print, and mail, fax, or scan/email back to you can be cumbersome and deter prospective clients—particularly more sophisticated clientele. Plus, transferring typed data is faster and results in fewer errors than deciphering and entering handwritten responses.

Better yet, use a web-based appointment booking solution like Acuity Scheduling that enables you to request what you need to know about a client while scheduling an appointment using integrated online intake forms. You can even require the prospective client to affirmatively click in advance that they've agreed to your terms of use and privacy policies.

Finally... are you ready to accept the representation?

5. Make it easy to retain you. Be ready to send legal representation and fee agreements quickly. For example, fee agreements and other documents can be emailed to clients for review and signed electronically. If you utilize a cloud-based practice management system like CLIO, you can also start onboarding clients at this time.

Since most attorneys require a



Amy E. Mitchell manages an Austin-based boutique entertainment law firm that has served creative professionals in the music, film, and television industries since 2004. She is the founder and returning chair of the Entertainment & Sports Law Section of the Austin Bar Association and course director for the State Bar of Texas' annual Entertainment Law 101 program. See www.amyemitchell.com for more information.

legal deposit prior to beginning representation, why not offer to collect these initial payments electronically? Many consumers are comfortable with online payments and services like LawPay make paying retainers easy and ethical. Bonus: If you're worried about credit card transaction fees, you can ask for a small retainer via credit card to get started right away and have the client send the remainder via mailed check. This minimizes the hit from credit card processing fees and shows the client that you're ready to hit the ground running—a win-win! ^A

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