

Lawyers – Initial Telephone Conversation with Potential Client Checklist

- Take the call personally
- Briefly, assess client's circumstances
- Is there a court action commenced?
- Elicit their needs, interests, hopes, fears
- Describe briefly, in a balanced manner, the process options
- Explain your initial consult procedure (time, cost)
- Offer to send them out some materials to review
- Direct them to web resources
 - Yours
 - Two Rivers
 - CPW/OACP
 - IACP
- Ask if they would like to make an appointment to have a deeper conversation

