


Lawyers – Initial Client Consultation Checklist

- Introduce yourself and make the client feel comfortable
 - Ask open-ended questions to build rapport
 - Offer appropriate personal and professional information about yourself
 - Defer discussion of legal questions until later
- Identify client's goals, interests, issues
 - Determine purpose of consultation
 - Internally assess client circumstances and emotions
 - Verbally acknowledge and normalize emotions and awareness of concerns without "buying into them"
- Listen to client's concerns
- Reframe positions into interests and focus on underlying concerns
- Address and normalize worries without "buying into them", such as:
 - Anxiety/fear over uncertain future, outcome of critical issues
 - Skepticism about working together
 - Concerns about relationship imbalances
- Distinguish micro from "Big Picture" thinking and orient client toward the "Big Picture" to:
 - Maximize outcomes
 - Provide greater client control over process, timing, and outcome
 - Allow for sufficient information-gathering
 - Allow for constructive communication
 - Allow for a safe process

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- Ask client how s/he will know the result is successful at the end
- Ask about the other party's awareness and understanding of client's intentions, goals, interests, issues
- Explain the importance of choosing the process structure that speaks to client's underlying interests
- Assess for challenging circumstances
 - DV screening
 - Addictions
 - Physical and behavioral health issues
 - Special needs of client, partner, child(ren)
 - Readiness for divorce
 - Financial concerns
- Explain process options and assess pros and cons of each process option in light of client's underlying interests and unique circumstances
- Discuss relevant legal principles, putting the law into perspective based on their process choice (court-controlled outcome vs. client-controlled outcome)
- Decide if lawyer is willing to represent the client using the process chosen by the client
- Decide how best to initiate the process and enroll the other party
- Talk about fees and costs, and provide client with your professional services agreement and other relevant material
- Check in with client to confirm whether their needs were met and respond to any additional concerns, again focusing on the "Big Picture"

