How to Conduct Effective Lawyer-Client Interviews: Questions and Tips

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When it comes to initial interviews with potential clients, are you asking the right background questions?

Lawyers devote significant time, energy, and marketing money to nurturing leads and winning new clients. But if you rush through the initial interview or fail to prepare the most effective client interview questions, you'll likely miss out on major opportunities for you and your client.

In the following guide, we'll dive into client interviewing techniques for lawyers—offering tips for how to refine your initial client interview process and how you can best prepare for an initial client interview.

In addition, we'll offer some lawyer-client interview sample questions to integrate into your process.

How do you prepare for a lawyer-client interview?

Conducting a great client interview is critical to an effective client intake process, and it's an important initial step to providing a client-centered experience. The key is to prepare: Asking the right client background questions quickly and effectively lets you know what they need.

At the same time, the questions lawyers ask clients also helps establish clear communication and expectations on both sides.

No matter how many lawyer-client interviews you've conducted, it's still important to prepare by reviewing the client's file. You'll also need to plan the interview structure and prepare attorney-client interview questions. You'll also want to be ready with a strategy to manage expectations (we'll go into more detail below).

At the pre-interview stage, consider your goals and let them guide your preparations. This means considering what you want to get out of the interview—including learning about the legal issue at hand, establishing a positive client experience, and winning the client.

4 key steps for a successful lawyer-client meeting

Conduct a thoughtful pre-screen and conflict check

As our guide to client intake for law firms explains, taking steps to ensure that a potential client is a good fit before moving forward is an important part of an effective client intake process.

Not every legal issue will be a good fit for you, your practice area, workload, and firm size—but that's normal.

- **Pre-screen:** Before you book the interview, have a set pre-screening process. Ask for basic information (for example, via an intake questionnaire) to help you decide if the client may (or may not) be a fit for your firm. You can make this process simpler for the client by using an online intake forms tool, like Clio Grow.
- **Conflict check:** You'll also want to do a conflict check before proceeding to ensure there are no conflicts of interest or other reasons that will prevent you from working with someone. Here again, an online intake tool can make this easier for you and the client. Clio Grow, for example, can be part of a robust conflict check process.

Review the client's file

The initial client intake interview should be for asking questions, not for learning basic client details. Before the interview, ask for any relevant information and documents so you can review them in advance. This step helps you identify key areas to explore using client background questions during the interview.

Prepare, prepare, prepare: your questions and answers

Once you've reviewed the client's file, prepare background questions to ask your client, and take some time to anticipate questions that the client may have for you. We'll discuss more on what answers (for clients) lawyers should prep for before the interview below.

Remember: Your goal is to have the client fill in blanks, reveal their goals and expectations, and tell you about the case. Because of this, you should ask open-ended questions to encourage them to share more details.

Send a confirmation email and a reminder

Especially if you've taken the time to thoroughly prepare for the interview, there's nothing worse than a no-show. While some no-shows are unavoidable, often a simple confirmation email and a reminder can ensure your potential client makes the meeting.

Be sure to include the appointment date and time and any other pertinent information for the client's convenience.

A proactive step like this also helps show that you will be offering a client-centric experience from the start of your client's journey. Reminders don't have to take time away from your legal work.

Tools like the legal appointment booking software in Clio Grow can streamline the process by sending automated appointment confirmations and reminders.

Explore more ways to save time and deliver a better client experience by automating client intake.

How to structure a lawyer-client interview: sample questions to ask your potential clients

While the exact questions lawyers ask clients should be customized to each potential client's specific situation, incorporating a client interview template ensures you cover all essential client background questions effectively. These lawyer-client interview example questions are a good starting point:

Could I confirm your details?

Starting with a simple easy-to-answer question can help ease the potential client into the conversation, while letting you confirm important details.

I see you're having an issue with X, can you tell me more about that?

It's important to establish that you've done your research and have an understanding of what the issue is. But it's also essential to also allow the client to tell you what the problem is. Don't make assumptions and listen to what they say. If they are vague or unclear about certain things, you can always follow up for more details.

It's also important to be mindful of how the structure and focus of your lawyer-client questions will vary depending on your practice area and the type of case at hand.

For example, a sample client interview in a criminal case may include questions about factors like the details of an arrest or criminal charges that wouldn't apply to sample client interviews in a civil case.

Have you worked with a lawyer before? Have you worked with another lawyer on this specific matter already?

If the client has worked with another lawyer (whether on this case or a previous matter), the way that they answer this question can give you insights into their expectations of a lawyer. This way, you can gauge if you'll be able to meet them.

This can also help you know how familiar (or unfamiliar) the client is with the legal system and its processes. Additionally, if they have worked with another lawyer on this matter, you'll want to know why they're coming to you now.

Can you share why you want to pursue this matter?

To put the client's experience first, you need to know why the client is pursuing a matter, how serious they are about taking it on, and how they feel about it. Let them share their reasons and feelings about the case.

How can I help you?

Be direct. By asking this open-ended question, you can get a better understanding of what the client's expectations of you will be. At the same time, you are prioritizing the client's needs.

Could you walk me through your case?

Instead of asking detailed questions at this point, ask the client to walk you through the facts of their case. This can help you identify what's most important to them and get a general picture of the issue.

What are you most concerned about?

As an experienced attorney, you may focus on certain elements of a case. But the lawyer-client interview is the time to learn what worries or most concerns the potential client.

This could be the case's outcome or it could be the cost of legal services. Knowing this can help you proceed in a way that will best serve your client.

What is your goal for your case?

While you may have already formed ideas for how you want to handle a case, it's important to clarify what result your potential client wants to see.

This can be crucial in understanding if you're the right fit for the client. It's better for both you and the potential client to determine if you can help them achieve their goals at the stage of client interviewing in law then later down the road.

Do you have any additional information or documents that I should have?

You never know what you don't know or what you might have missed. This type of simple, open-ended question lets clients bring up any points you may not be aware of.

Why did you choose me to handle your case?

While your client's answer may offer useful insights into your firm's reputation and how your law firm marketing is attracting potential clients, the most important information to glean here is about your client. The way that they found your firm and the reasons they selected you to handle their matter can tell you a lot about how they think, how they make decisions, and what they value when working with an attorney.

Preparing for client questions: Answers every lawyer should have ready

The meeting isn't just about you interviewing a potential client—the client will have questions for you, too. Being prepared for the common questions that clients have is key. Here are four common questions you should prepare to answer:

1. What should I do next?

As a legal professional, potential clients are turning to you for your expertise and guidance. You need to provide clear next steps (for example, when they can expect you to contact them) to give clients confidence in you as a lawyer.

2. How much would my case cost?

Price predictability is part of a good client experience—and a reasonable concern for clients during an initial interview. So, be prepared to discuss your law firm pricing and billing process so that potential clients can get a realistic estimate and expectation of what their case may cost.

For example, let them know if you bill hourly, have a flat fee, or offer alternative fee structures.

3. What is the process for my case?

While you may not be able to predict specifics, be prepared to lay out the general process and approximate timelines for the client. This way, they will have a better idea of what to expect, and when.

4. Can I get more information about my case?

Set realistic expectations for timelines and frequency of communication updates.

For example, your client may think you'll call with daily updates. But if that's not practical for you, discuss it to see if you can find a solution that works for both of you—before you start with engagement.

Best practices for conducting lawyer-client interviews

If you want to nail your initial consultation, it's about more than just what attorney-client interview questions you ask. Follow these tips for interviewing in a client-centric way:

1. Make the client feel comfortable

You may deal with the law every day, but pursuing a legal issue can be stressful, draining, and even scary for potential clients. With this in mind, do your best to be emotionally sensitive and make them feel as at ease as possible. Whether you're meeting in person or virtually over video conference, make sure the setting is clean and comfortable.

Also, the lawyer-client interview is not the time to try to impress the client with your fanciest lawyer-speak. Avoid using legal jargon and overly technical language. Unnecessary jargon can alienate the client and make them feel overwhelmed and even

talked down to. This is the opposite of the positive client-centered experience you're aiming for.

2. Observe non-verbal communication

When asking your lawyer-client interview questions, is the client fidgeting, or do they look like they have something to add? Pay attention to non-verbal cues. Clients may be nervous or intimidated, but non-verbal communication can help you determine if you need to ask more specific questions to get them to share more.

It's also a good idea to be aware of your own non-verbal communication—if you appear disinterested, your potential client will likely pick up on that.

3. Listen, listen, listen during your initial consultation

The best thing you can do when asking your lawyer-client interview questions during your initial consultation is just listen. This is the time when the client should be doing most of the talking. This ensures your client feels heard while answering the background questions you've prepared. Follow client communication best practices and try to avoid cutting them off or filling in pauses.

However, this doesn't mean you should be silent—listen, but also circle back and ask the client to clarify details when necessary.

4. Integrate with your practice management software

Keep in mind that the client interview is part of the client intake process. That's why it's important to keep tasks related to the interview as simple and streamlined as possible. Look for opportunities to integrate tasks—like pre-interview contact information collection—with your practice management software.

This way, you can eliminate duplicate data entry for clients (i.e. they only have to fill out their information once) and your firm.

If you use Clio Expand, for example, Clio Grow's client intake software works together with Clio Manage's practice management software for a seamless experience.

5. Track potential clients by their stage in the client intake process

The client interview is part of your overall client intake process, so it's important to track it for efficiency and ensure that no potential clients get missed. If you're using online client intake software, you can easily track and see a potential client's status in stages.

6. Ask about their preferred mode of communication

If you're committed to delivering an exceptional client experience, it's important to make an effort to communicate with your clients the way they want to be communicated with.

After asking your lawyer-client interview questions, ask your potential client how they want to be communicated with.

For example, according to the *2022 Legal Trends Report*, over one third of lawyers recognize that clients have a preference for remote communication and are adapting to make their services more convenient for these preferences.

According to the *2020 Legal Trends Report*, 56% of consumers would prefer videoconferencing over a phone call. But you won't know your potential client's preference unless you ask.

Of course, it's important to discuss which platforms are appropriate for communicating sensitive information.

For example, text messaging may be acceptable in certain instances, but not in others.

7. Manage client expectations

Don't over-promise just to win the client's business. Clients appreciate honesty and a realistic vision of what they can expect if they move forward with you on their legal matter.

8. Communicate clearly

Clear communication goes hand-in-hand with effectively managing client expectations, so be sure to be open and honest when communicating with your client.

Leave time in the consultation to discuss fees (if the client doesn't ask you first). Go over your pricing, billing process, accepted payment methods, and other payment details like possible alternative billing methods you may offer. Let your potential client decide if they can realistically pay for your services in a way that works for them and for your firm.

No matter how the interview goes, make sure the client knows what the next steps are so they can make informed decisions and aren't unsure of what to do next.

If you decide not to move forward with a potential client, it's important to close the loop by sending a non-engagement letter. This ensures you're providing client-centered communication and potentially avoid future malpractice claims.

Final thoughts on lawyer-client interviews

Conducting a great client interview is critical to an effective client intake process. It's also an important part of providing a client-centered experience.

If you want to perfect your process, the key is to prepare with the right lawyer-client interview questions—and truly listen to their answers.

By using a well-structured client interview template and asking insightful client background questions at the start, you'll better understand your client's expectations (whether you move forward or not). This way, your potential client will start their journey with your firm feeling heard, which is key to a great client-centered experience.

Will you be hiring at your firm? Here are some examples of law firm questions for interview subjects.

Note: The information in this article applies only to US practices. This post is provided for informational purposes only. It does not constitute legal, business, or accounting advice.

Frequently asked questions

How to interview a client?

The key to interviewing a new client is to be prepared. Review the client's file, conduct a pre-screen and conflict check, and know your questions. Then, ask the client to outline their legal issue, their goals for their case, and how they want you to assist them. You should also be prepared to answer any questions that the client may have for you, which may include questions about process, budget, and communication.

What questions should a lawyer ask a client?

In the initial attorney-client consultation, a lawyer should ask a client questions about the facts of their legal matter, why they want to pursue the matter, and their goals for the case. Be sure to listen carefully and observe non-verbal communication.

What questions do lawyers ask their clients?

In the initial interview between client and lawyer, lawyers ask questions about the client, their case, and their expectations. At this stage, lawyers may ask clients to walk them through the case and to lay out their goals and expectations for the matter's ideal outcome, budget, and communication style and frequency.

What is it called when a lawyer asks their client questions?

A lawyer should ask their client numerous questions during the initial client interview. In addition to gathering information and clarifying the legal matter, the attorney should listen carefully, manage client expectations, and consider practice management software to streamline the process.

What's the best way to start a personal/professional email to a new potential customer?

The best way to start an email to a new potential customer is with a polite greeting and introduction, such as "Dear [Customer's Name], My name is [Your Name], and I am [Your Position] at [Your Company]." Clearly state the purpose of your email, such as "I am reaching out to discuss how our [product/service] can benefit you." End with a call to action, like "I would love to schedule a meeting to explore how we can support your needs."

About Clio

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