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Screening and Managing Clients

III. LAW OFFICE PRACTICE

Themes:

- Understanding the importance of case and client screening procedures.
 - Case acceptance guidelines and good client screening procedures are the first steps in building a quality practice.

Conversation Starters:

- What are some red flags that should be identified in potential clients (number of previous attorneys, erratic speech/behavior)?
 - How would you treat red flags that are identified? Is the potential client disqualified, or does the case need special handling from the attorney?
 - Part of identifying challenging clients is both budgeting for the time commitment and providing the client a realistic expectation of how far their advance fee deposit will go.
- How do you manage client expectations?
 - How do you set the tone starting with attorney-client agreement, written policies that you provide to the client, and the initial interview?
 - Written policies may cover third-party payers, children in the office, expectations for clients who attend court hearings, appointment/drop-in policy, texting and after-hours communication, document retention, etc.

Activities:

- Identifying/screening difficult clients:
 - Mediation training can provide useful skills. Review available mediation trainings.
 - Review publications by Bill Eddy and other non-violent communication experts, as well as experts in mental health fields. A lawyer cannot diagnose nor treat, but the recognition of certain behaviors can help strengthen the attorney-client relationship and remind the attorney that conflict as a result of these issues may not be avoidable, but it can be managed. Higher conflict cases are harder on an attorney's own mental health and well-being, so identifying them up front can give the attorney an opportunity to decide whether or not they have the resources to take on such a case.

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Activities (continued):

- Take courses on trauma-informed lawyering. Trauma-informed lawyering is essential for understanding and recognizing the impact of trauma on clients, enabling lawyers to provide empathetic and sensitive legal representation. By integrating trauma-informed practices, lawyers can create a safer and more supportive environment that fosters trust, healing, and better outcomes for their clients who have experienced trauma.

Resources:

- Discuss what additional resources the mentor/mentee has found useful in their own practice.
- Be prepared to provide resources for clients as needed.
 - Have a list of service providers specific to your area of practice (i.e., family law attorneys might keep a list of parenting resources (classes, instructors, evaluators) and bankruptcy attorneys might keep a list of financial educators).
- Washington State Bar Association
 - [Practice Management Assistance](#)
 - [Law Firm Practice Guides and Forms](#)

Do not be afraid to encourage clients to seek mental health counseling, financial education, domestic violence, substance abuse and other forms of assistance.