



# THE LAW FIRM MANAGEMENT ACADEMY

BUILDING PROFITABLE LAW PRACTICES



Initial Intake Meeting:  
Purpose, Structure, and  
Essential Information

A Comprehensive  
Guide for Law Firms

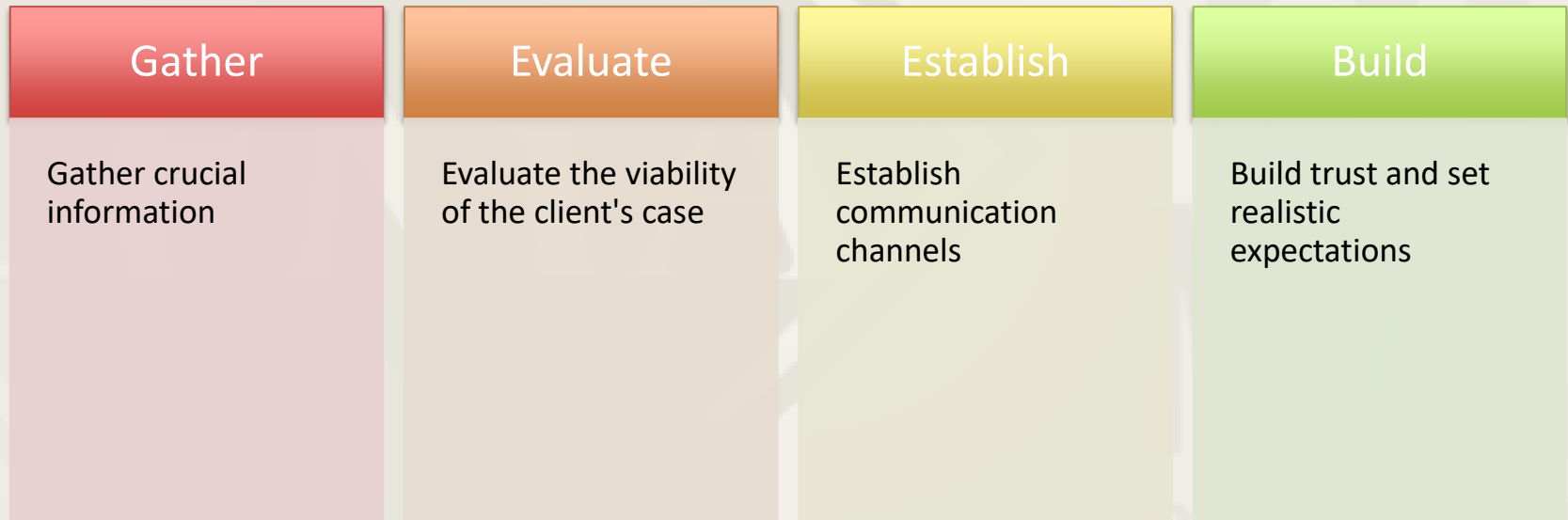


# Introduction



- Pivotal moment in the client intake process
- First direct interaction with a potential new client
- Sets the stage for a strong attorney-client relationship
- Opportunity to convince the PNC to hire the firm

# Purpose of the Initial Intake Meeting



# Structure of the Initial Intake Meeting



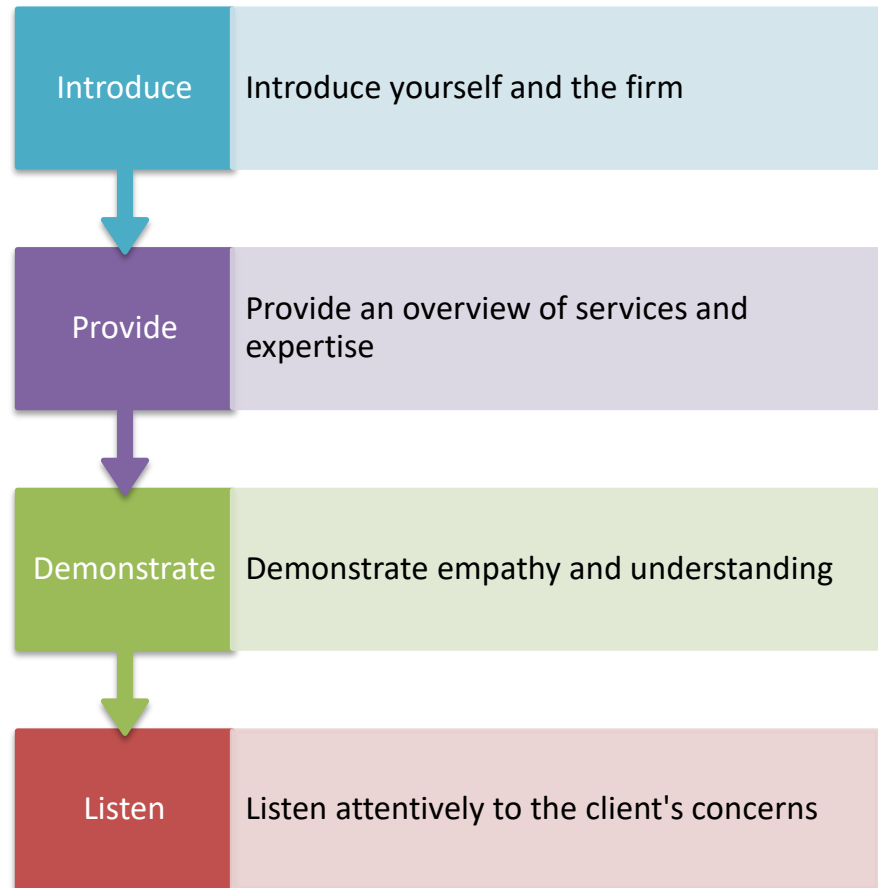
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# Introduction and Rapport Building



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# Gathering Basic Information

Collect personal and  
contact details

Full name, address,  
phone number, email

Vital for future  
communication

Maintain accurate  
records

# Fact-Finding and Case Overview

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Allow client to narrate  
their case

Encourage chronological  
account of events

Collect supporting  
documentation

Take detailed notes for  
accuracy

# Assessing Legal Issues

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1

Analyze  
information for  
legal issues

2

Assess merits of  
the case

3

Examine  
possible  
defenses

4

Consider  
relevant laws  
and regulations



# Conflict of Interest Check

Conduct	Conduct conflict of interest search
Ensure	Ensure no ethical or legal conflicts
Maintain	Maintain professional integrity
Avoid	Avoid potential disputes

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# Addressing Client Questions and Concerns



**Provide opportunity  
for questions**



**Clarify legal terms  
and processes**



**Manage  
expectations about  
timelines and costs**



**Establish open  
communication**



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# Retainer Agreement and Fee Structure

Discuss	Discuss retainer agreement
Explain	Explain terms and hourly rates
Clarify	Clarify billing cycles and additional costs
Ensure	Ensure client understands financial obligations



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## Next Steps

Outline the next steps

Provide general timeline

Inform client about necessary paperwork

Clarify ongoing communication process



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# Essential Information



Personal and contact  
information



Case details and  
supporting  
documents



Relevant dates,  
locations, and  
individuals



Previous legal actions  
or ongoing lawsuits



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## Conclusion

Foundational step  
in the relationship

Vital role in the  
intake process

Evaluate the client's  
case effectively

Provide informed  
legal advice



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# Thank You

- Thank you for your attention.