

Starting Strong Series

Episode 1: Client Communication Checklist

Pre-Meeting Preparation

- Gather basic case information during initial call
- Ask about general concerns (children involved, contested issues, etc.)
- Research relevant area of law and recent developments
- Prepare plain-English explanations for likely legal concepts
- Review emotional landscape typical for this type of case
- Prepare standard response for unknown questions: "That's a great question, and I want to give you an accurate answer. Let me research that and get back to you by [specific time]."

Meeting Setup & Technology

- If using recording/transcription technology:
 - Obtain written client consent
 - Verify service meets confidentiality requirements
 - Ensure secure data storage without third-party access
- Prepare note-taking materials as backup
- Test all technology before client arrives

During the Meeting

- Spend first 5 minutes asking about concerns and worries, not just legal facts
- Listen for the real question behind their words
- Pay attention to what they're NOT saying (tone changes, hesitation, avoided topics)
- Reflect back what you hear in your own words
- Use the "So what?" test for all legal explanations
- Check for understanding naturally: "Does that make sense so far?"
- Present options with likely consequences, not just legal analysis
- Maintain eye contact even while taking notes

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Communication Best Practices

- Use plain English, not legal jargon
- Replace legal terms with conversational language:
 - "The judge will make a decision" (not "adjudicate the matter")
 - "Ask the judge to order support" (not "file a motion for temporary support")
- Be honest about uncertainty and timelines
- Address both legal needs and emotional concerns

Meeting Close

- Ask: "What's your biggest question or worry as we leave here today?"
- Address that concern before client leaves
- Ensure client feels more informed, confident, and trusting than when they arrived
- Schedule follow-up communication