# A Complete List of Client Interview Questions for Law Firms

Lead and client acquisition is a big part of your law firm’s business development strategy. The tactics your firm uses to attract leads are one thing, but converting leads into loyal business is another ball game.

An effective client interview is crucial for a smooth client intake process and a client-centered experience, and that starts by understanding your ideal clientele and asking all the right questions.

## Why Are Lawyer-Client Interviews Important?

Lawyers devote a lot of time and energy to nurturing client leads and attracting clients. If you don’t handle the initial interview properly, you can miss out on valuable opportunities.

Client interviews are necessary to:

- Assess client needs and understand how you can help
- Check for potential conflicts of interest

- Determine the scope of work for the case

Two people in an interview

## What Information Do Law Firms Need from Clients?

Before the interview takes place, it's important to have a pre-screening process with your intake questionnaire to decide if the client is the right fit for the firm. It's also crucial to do a conflict check before proceeding with the client as well.

The client intake form also contains contact information, basic details, and supporting documents, which you should be familiar with prior to the interview. The purpose of the interview is for both parties to ask questions and get a clear idea of the legal situation and expectations.

## Tips to Prepare for Client Interviews

Here are some tips to prepare for your client interviews and set the stage for the professional relationship:

### Standardize the Process

Client intake should be standardized to keep you organized and reduce manual data entry. This should include a pre-screen with online intake forms and a conflict check prior to the interview to ensure you're not wasting time on a client that's not the right fit.

### Use Technology to Capture Information

Tracking and managing the client relationship with law practice management software provides better service for the client and makes your firm more efficient. Bill4Time's client management provides a comprehensive view of the client relationship, from the first touchpoint to invoicing, with all the information in one centralized location. You can also gather and manage documents related to the client.

With all this information at your disposal, you can thoroughly prepare for the interview and ensure you and your client get the most out of your time.

### Plan Ahead

The interview will be for you to ask questions to understand your prospective client’s legal issue, but it’s also an opportunity for the client to ask you questions. This is important for setting up expectations and communicating clearly with the client.

Generally, the client will want to know what to expect from their case, the anticipated timeline, and their next steps. Another concern is often price, so this is a good time to discuss your law firm’s collections and billing policies to help them prepare. If you offer alternative fee structures, offer them to the client during the interview.

Person in front of laptop with Bill4Time client relationship management feature scree

## 11 Essential Questions to Ask When Interviewing Clients

The questions you will ask may vary according to the client’s specific situation, but these will apply to virtually every client:

### 1. Could I confirm your contact information and case details?

Mistakes can happen with manual data entry. This is a good time to confirm the client’s contact details and ensure you cover all the basic information.

### 2. Can you tell me more about your legal issue?

You will have done the research on your prospective client’s issue in advance, but it’s important to listen to it from their perspective. Ask for clarification where needed and take notes of any flags you may need to address such as conflict of interest or services you may not provide.

### 3. Have you worked with a lawyer before?

If the prospective client has worked with another lawyer in the past, their answer to this question will give you insights into their expectations of the lawyer-client relationship and whether they’re the right fit for your firm. It also reveals how familiar they are with the legal system.

Additionally, this question will reinforce the conflict check process to ensure there are no red flags with retaining the client.

## 4. Have you worked with a lawyer on this specific matter?

If the prospective client has worked with another lawyer on this specific matter, it's important to know why they are coming to you instead. Be sure to ask follow-up questions if needed to understand their reasoning.

## 5. Can you tell me why you want to pursue this matter?

This is an opportunity for the prospective client to share their understanding of their legal situation and how they feel about the case. It will reveal how serious they are about the issue and why they're pursuing it as well.

## 6. Can you walk me through your legal issue?

This is another question to glean an understanding of how the client views their legal matter and their understanding of the facts. You'll also gain some insight into what's most important to them.

## 7. What are you most concerned about with this matter?

As a lawyer, you'll likely have a different focus for the case than your client. This is the time to understand what is concerning the prospective client, such as the cost of pursuing legal action or the possible outcome, and how you can best serve them.

## 8. How can I help you with this matter?

This is an open-ended question that can reveal what the prospective client expects from you and why they're looking for the aid of a lawyer instead of handling it themselves. It also shows the prospective client that you're putting their needs first.

## 9. What is your goal for this matter?

You may have an idea of how you want to handle a case and what you expect the outcome to be, but it's crucial that you understand how your client sees the case unfolding.

### 10. Do you have any additional information or supporting documents that I should have?

It's possible for either you or the prospective client to miss details or documents. Asking this question gives them the opportunity to add any details that may not have come up.

### 11. Do you have any questions for me?

After you've covered all the information you need in the initial interview, give the client a chance to ask questions.

## Strengthen Client Interviews at Your Firm

The lawyer-client interview is a key part of your client intake process. It's best to be prepared with the right research and questions to understand what the client expects of you, whether they're a fit for the firm, and how you can provide the best service.