Setting Expectations for a New Client

1. Gather full contact details for all key contacts (yourself, secretary, backup lawyer) and share them with the client in one team chart or one email place.
2. Research the client's business and industry – use AI, set up news alerts, review their website, check and connect with them on LinkedIn, and offer to visit locations or discuss recent developments.
3. Before starting work, clarify expectations: desired outcomes, risk tolerance, budget, and possible concerns.
4. Identify who will take the lead on matters - distinguish roles between in-house and outside counsel.
5. Determine the client's preferred primary contact and request contact information for all relevant people.
6. Ask whether outside counsel can contact company parties directly or must go through in-house counsel.
7. Clarify what decisions require client input (e.g., strategy shifts, staffing, retaining experts, motions).
8. Decide who should receive copies of case developments and communications (within the client's company and your firm).
9. For larger matters, offer a secure online portal for sharing updates and documents.
10. Establish what documents or pleadings the client wants to review before submission and how much advance notice is preferred.
11. Set guidelines for status updates, draft reviews, and required reporting frequency.
12. Clarify whether the client wants to be copied on all correspondence or prefers summary reports at certain milestones.
13. Identify the assigned legal team, share brief bios if new, and create a team chart or comms group when appropriate.
14. Review and follow the client's billing preferences, guidelines, and format; confirm billing frequency, level of detail, and accepted expenses.
15. Discuss budget requirements and formats and check for insurance coverage if relevant.
16. After the engagement, schedule a debrief (off the clock) and solicit feedback on what worked well and what to improve, then follow up with ongoing communication and relevant insights.

This list will help ensure transparent communication, prevent misunderstandings, and help develop long-term client satisfaction.

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