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A Family Law Firm's Guide to Client Intake

developers · Wednesday, January 19th, 2022

Family law clients are in deep conflict. They're facing some of the most trying situations in their lives, whether it's a matter of a separation agreement, divorce, alimony or child support dispute, or child custody battle. Their nerves are likely frayed, and they need support and guidance.

So, prospective family law clients probably need a little more hand-holding and care than many other types of clients. Because their issues are so personal, they likely need an empathetic ear. They'd also benefit from a client intake process that eliminates the fear of working on personal matters with a stranger and makes it easy for them to start moving forward.

One way that family law firms can make client intake easier for prospects is to offer a questionnaire that helps prepare clients for the information they need to share, so they can organize their thoughts and documents in advance.

Here's how an online intake form can help you make the most of the intake process, so you start your attorney-client relationship off on the right foot:

How does an outstanding client experience add value?

Clients create value for any business, including law firms. Since the practice of law is a client-based (and reputation-based) business, law firms need to provide an outstanding client experience from the very beginning.

Keep in mind that your family law clients are likely a source of repeat business. (Let's hope that their disputes are one-and-done and that they instead help you grow your firm's revenue by attracting new clients with positive online testimonials and referrals.)

Unfortunately, many lawyers are too busy practicing law to give a lot of thought to the client experience. That's a mistake because there's little otherwise to differentiate you from other law firms. To ensure your clients walk away with a great impression, you should communicate regularly with them and keep them updated on their case, use technology to create a client portal for ease of billing and calendaring, and of course, develop a thoughtful client intake process.

Why does client intake matter for family law firms?

The practice of family law is different from other areas of law because it's emotionally charged and often adversarial. It's also incredibly personal and potentially embarrassing or terrifying—

especially for victims of emotional and physical abuse.

Family law clients often feel a little shellshocked when they first walk in for an initial consultation. Not only are they going through something traumatic, but then they must share the most personal, intimate details of their ordeal with a complete stranger. That’s why it’s critical for lawyers to build a sense of trust with new clients at the very beginning— and to do so very quickly.

Without that trust, clients may not share important information that is potentially damaging to their case. Worse yet, they might run for the door and into a different lawyer’s office.

What is client intake, and why is it so important?

The best way for a family law lawyer to create a positive client intake experience is to prepare in advance. That way, you’ll be ready to handle any emotional discussions more productively. This might mean implementing technology for a smooth virtual intake process or giving your client a form to fill out beforehand.

A client intake form, when built correctly, can give your clients direction. It can also get them used to talking about their issues so that they don’t get so flummoxed that they clam up and refuse to talk or unload like you’re their therapist.

Streamlining the intake process also cuts down on the risk of making a bad first impression. When asking questions about personal matters like domestic disputes, attorneys at law may appear to be insensitive. A questionnaire avoids that discomfort because you’ll be informed about the client’s situation in advance and be ready to start proposing solutions.

And if you share the form before your meeting, rather than requiring clients to fill it out when they get to your office, you’ll be more prepared for your first meeting.

What should you include on a family law client intake form?

You’ll need more than a basic contact form to get the information you need to improve the intake process. A comprehensive family law intake online form asks targeted questions. While it may not cover every single angle you’ll need to know about your client, it will give you a baseline of information to guide your conversation during the initial consultation.

The key is to start with general information and then move to more specific details. Here are some of the things that your family law intake form should cover:

- **Client information**: Get their name, contact information including mailing address, date of birth, and Social Security number.
- **Employer name**: Find out where they are employed, including details about their job title, salary, and insurance.
- **Financial information**: Ask for details about their property and assets, such as real estate holdings, bank accounts, retirement or other investment accounts, and liabilities and expenses, including mortgage or rent payments, car payments, utilities, and debt carried on credit cards. (You might be tempted to ask them for payment information for a retainer, but that can come later.)
- **Relationship information**: Request basic details about their spouse or partner, date and place of marriage, date of separation, and address with spouse or partner. Ask details about their spouse or

partner too, including their name, Social Security number, date of birth, address, and their employer and income. Ask whether their spouse or partner has obtained counsel and gather that information as well.
- **Children**: Get the full names and birth dates of any children from this relationship or prior relationships. Ask for information about custody and visitation arrangements as well as who is paying for the children's current expenses, including insurance.
- **Legal situation**: Find out whether your client or their partner or spouse has been married previously, has support obligations, or has had any prior legal proceedings, such as a restraining order, whether as the petitioner or respondent. Ask whether Social Services or another agency has been involved.

It's also a good idea to ask a few narrative questions, such as "describe your relationship with your kids," "explain your biggest concerns about this situation," and so forth. Questions like these give new clients a chance to tell their stories before talking to you. You can use this background to frame your discussion.

Download our client intake form template

If you don't already have a client intake form, download our template (see the pop-up to your left?) to start building your own. Using an online client intake form can strengthen your client relationships, giving you the foundation for a better client experience from the very beginning.

This entry was posted on Wednesday, January 19th, 2022 at 12:00 am and is filed under Client Experience, General
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