Ammé Paralegal Group

Legal Intake

Your Trusted Partner in Frontline Legal Support

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Why client take matters?

- Intake is the client first experience.
- Intake impacts revenue, client quality, and also exposure.
- Poor intake can case firms take on bad clients

Bad intakes = Trouble

Intake failure may be rarely seen but it is expensive.

- Missed call= No money
- Bad claims pushed though the intake process cause not only you to waste time but the attorney.
- Poor intake screening leads to hard to deal with clients, ethical violations, and ending to dispute fees.

What Is Legal Client Intake?

- Intital contract, Case screening & qualification
- Conflict checks, Fee discussion
- Engagement or decline

Intake vs Consultation vs Engagement

- Intake: Information gathering and screening
- Consultation:Legal analysis(possibly being paid)
- Engagement: Attorney client relationship formed

Who Handles Intake?

- Attorney
- Intake staff/
- Online forms & automation

Ethical Risk During Intake

- Accidental attorney client relationship
- Providing legal advice too early
- Improper rejection of representation

Conflict Check

- It must happen before substantive discussion
- Name of all parties and Related entities
- Document the results

Declining Properly

- Be prompt
- Avoid legal advice
- Use disengagement letters to firm or potential client

Best Practices

- Consistency protects your firm
- Define qualified criteria
- Nature of issue
- Urgency and deadlines

Red Flags

- Prior fired attorneys/ Multiple firm declines
- Urgency without explination
- Resistance to fees or process

All cases are not good cases.

Let Ammé Paralegal Group Help Your Business or Firm with Intake

Ammé Paralegal Group provides support in not only paralegal support but specializes in client intake. We help educate individuals in a client intake role or looking to enter into the role of a client intake.

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Thank You So Much!