

# The ABCs of an Initial Consultation

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The initial consultation is crucial for setting the tone of the attorney-client relationship, and there are various tactics to approaching this first encounter. While some lawyers see it as a sales opportunity to secure the client's business, others feel obligated to conduct a detailed legal analysis and offer advice. Whatever style you adopt, it is important that you discuss certain expectations of your representation, including the fee arrangement and collection of payments.

## Free Consultation vs. Paid Consultation

Many law practices routinely offer free consultations to market their services and compete with other attorneys. While this strategy provides worth to the client, its value to the lawyer is debatable. Time is money in a law firm, so this 20 to 30 minutes spent with a nonpaying client needs to prove productive. For this reason, many attorneys employ methods to make these consultations more effective and conducive to their needs.

For example, some lawyers only offer free consultations for criminal matters, which tend to take less time and effort to analyze initially. Another tactic is to restrict the initial consultation to 15 minutes and limit the amount of information shared. You can also conduct your consults over the telephone or email to manage your time better. A good gatekeeper can also prove invaluable when scheduling consultations, turning away cases without obvious merit or subject matter not handled by your firm.

## The Details of Representation

While a quick case analysis is important during the consultation, it is even more important to provide a detailed explanation of the services you provide and to set out your expectations of the client. This is especially true once representation becomes probable. Explain what your representation

will entail by giving a brief outline of the case process and answering general questions the new client might ask. Exercise caution though. If the discussion is starting to entail legal advice, it's time to discuss a retainer agreement.

Be up front and clear about your fee structure, whether it's an hourly rate or a flat service fee. Explain to the client how often bills will arrive and accepted forms of payment. If your firm utilizes a comprehensive billing system, like TimeSolv, this part of the conversation is easy. Explain that the client will receive detailed billing invoices and statements on a regular basis, which bolsters confidence that work is progressing on the case. You can also explain that your clients have constant access to their accounts, where they can review bills or check the balances of their trust account.

Another convenient benefit of TimeSolv is the ease of making online payments. Let your new client know that a trip to the office is not necessary when payment is due. Bringing an account current only takes a few minutes and can be done from the comfort of home.

Finally, clearly define the consequences of nonpayment. Lay out your collection policy and the steps taken to ensure the satisfaction of overdue bills.

Make TimeSolv a routine part of your initial client consultation. With constant access to work progress and payment histories, your client can stay informed about the case and remunerate account balances with ease.

Learn more about the [online payment portal](#) and try out TimeSolv [free for 30 days](#) to see how we can help you better serve your clients, while collecting faster payments.

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