Themes:

- Understanding the importance of case and client screening procedures.
  - Case acceptance guidelines and good client screening procedures are the first steps in building a quality practice.

Conversation Starters:

- What are some red flags that should be identified in potential clients? (number of previous attorneys, erratic speech/behavior).
  - How would you treat red flags that are identified? Is the potential client disqualified, or does the case need special handling from the attorney?
    - Part of identifying challenging clients is both budgeting for the time commitment, as well as providing the client a realistic expectation of how far their advance fee deposit will go.

- How do you manage client expectations?
  - How do you set the tone starting with attorney-client agreement, written policies that you provide to the client, and the initial interview?
    - Written policies may cover third-party payers, children in the office, expectations for clients who attend court hearings, appointment/drop-in policy, texting and after-hours communication, etc.

Activities:

- Identifying/screening difficult clients:
  - Mediation training can provide useful skills. Review available mediation trainings.
  - Review publications by Bill Eddy and other non-violent communication experts, as well as experts in mental health fields. A lawyer cannot diagnose nor treat, but the recognition of certain behaviors can help strengthen the attorney-client relationship and remind the attorney that conflict as a result of these issues may not be avoidable, but it can be managed. Higher conflict cases are harder on an attorney’s own mental health and well-being, so identifying them up front can give the attorney an opportunity to decide whether or not they have the resources to take on such a case.
Screening and Managing Clients

Resources:

- Discuss what additional resources the mentor/mentee has found useful in their own practice.

- Be prepared to provide resources for clients as needed.
  - Have a list of service providers specific to your area of practice (i.e.: family law attorneys might keep a list of parenting resources [classes, instructors, evaluators] and bankruptcy attorneys might keep a list of financial educators).

- Washington State Bar Association
  - Practice Management Assistance
  - NWSide Bar Blog

Do not be afraid to encourage clients to seek mental health counseling, financial education, domestic violence, substance abuse and other forms of assistance.