Phone contact/script

Complete upon an attorney calling to make an inquiry. Be sure to get the correct spelling of the attorney’s name and contact information. You do not have to ask each and every question. Let the conversation flow naturally, but you must get the first ten questions addressed at a minimum.

1. Name
2. Can I ask how you learned of us?
3. Firm name
4. What is your phone number?
5. Email address
6. Will you be handling this case personally or are other associates involved? Is there a paralegal I need to copy?
7. Is this a plaintiff or defense case?
8. State or Federal and jurisdiction
9. What is the case name and docket number?
10. Who are the parties involved in the case so we can perform a conflicts check?
11. Are there any discovery deadlines or court dates that are already set?
12. Are there any budgetary constraints?
13. What is the current status of the case? In litigation?
14. Do you anticipate deposition in this case?
15. Do anticipate going to trial?
16. Where is the client located? What travel do you anticipate?
17. When asked about fees…I would be happy to email you a copy of our fee schedule. We require a retainer and can either bill periodically after that is exhausted or work by replenishable retainer; whichever you prefer.
18. If asked…”Where and how do you advertise your life care planning practice?” Website, free listings on HG.org, exhibitor at trial lawyers, etc.
19. If asked for references, be sure to list attorneys with good reputations and preferably both plaintiff and defense attorneys.
20. If asked about background and experience, offer to email them a copy of the planners CV.