



Marketing, Managing and Growing a Profitable Law Firm

Bankruptcy Lawyers And Intake Forms

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Bankruptcy lawyers seem to live and die by their intake forms. This is when we meet the client the first time, assess the situation, and decide whether it makes sense to work together. Lawyer asks questions, client answers and asks others. A game of volleyball that can last between 30 minutes and 2 hours depending on the lawyer.



New bankruptcy lawyers often hop on a listserv and ask for everyone to send them copies of their intake forms. Others buy a set from an online company, and still others use the built-in forms from their [software provider](#).

The result is a set of bankruptcy intake forms ranging from 20-40 pages, thick with legalese and minutiae. In an effort to avoid problems later, we force our client to do every bit of heavy lifting. No stone unturned means a stack of intake forms that would make an environmentalist cry.

Our clients, in return, provide us with half-completed intake forms, inaccurate responses, and downright useless disclosures. We are forced to go through every line and verify the information, or our paralegals do so for us. We end up wasting our time, our client's time, and our productivity.

So let's take stock of the end result. We spend too much time and are convinced that our clients can't follow simple directions. Our clients are bent out of shape because they feel like they're doing all the work, are confused because of all the jargon in the intake process, and frustrated with a process that was supposed to make their lives easier.

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All in all, it's a gigantic customer service failure. And the lawyers are to blame.

When you look at your bankruptcy intake forms from the client's side, you need to focus on collection of information in a way that is as simple as possible for the client. Anything less leads to bottlenecks and frustration.

You know what you need in order to assess whether you can help someone. You look at their income, their assets, general debt scenario and their expenses. Simple. Beyond that, the documents tell the story better than the client can ever tell it. Credit card bills, mortgage statements, utility bills - clients can't fudge the numbers because they've got the bills to give you. Those documents often don't need to be reviewed during an initial consultation, which should focus on the nitty-gritty of the situation. We're talking big picture here, folks.

Get the basics, ask the key questions about preferential transfers and other deal-breakers, then move along.

Out of frustration, I stopped using formal bankruptcy intake sheets about 20 minutes after I started practicing. Instead, I opt for a simple 6-page questionnaire that is comprised largely of yes/no questions. The questionnaire itself is fairly useless to most lawyers unless they understand my entire bankruptcy intake process. It's a fact-finding tour that includes an opportunity to learn about my prospective client, nothing more. I don't need to dig through the credit card bills and every pay stub to make an educated decision on whether I can help.

Having your client's handwriting on the intakes forms does not "cover you" in case of error.

You're probably thinking that the intake forms give you some sort of malpractice coverage. The reality is that isn't the case. The intake forms are wrong, they're garbage. If you're concerned about accuracy and a little bit of CYA then I suggest having your client review each page of the completed petition, schedules and related documents; get initials on each page once reviewed. In case of trouble, there's your CYA right there. And it's as accurate as you can possibly make it, as opposed to the intake forms.

What's the end result? A simple, clean process that makes it easier for a consumer to do business with my firm. By removing the barriers to entry I am faced with a more relaxed and forthcoming client, someone who is happy to work with me. The work involved in sorting through the documents provided is no greater than the arduous task of deconstructing an improperly completed bankruptcy intake package.

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Think about your client, balance it against the information you need to make an assessment of the situation, and go from there. Concentrate on the relationship and make it easier to work with you.

Photo courtesy of [yatoobin](#).

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