CIEbreaker

CIE's icebreaker for initial client meetings

CIE Legal

Day before the meeting

Have you?

	NEW	CURRENT
• Researched the client's website and checked for any recent news (e.g. Google search)	☐	☐
• Researched the person or people involved?	☐	☐
• Done a company / individual search (including a client conflict search)?	☐	☐
• Asked the client for copies of documents that will likely be discussed during the meeting?	☐	☐
• Arranged for a second lawyer to attend the meeting with you?	☐	☐
• Confirmed that the appointment invitation has been sent?	☐	☐

Before the meeting

Have you?

	NEW	CURRENT
• Familiarised yourself with the client's preferred video conferencing platform? Consider whether you have: • Downloaded the necessary software; • Confirmed the log-in details (or log-in link); • Check your display name; and • Test the integration with your camera/microphone.	☐	☐
• Opened any relevant documents on a screen that is ready of be shared (if required)?	☐	☐
• checked the background and lighting of your surroundings?	☐	☐
• considered whether the client expect you to be dressed formally?	☐	☐

Opening the meeting

Have you?

	NEW	CURRENT
• Conduct personal-professional check-ins while waiting for all participants to join the call.	☐	☐
• Introduce any participants on the call who may not know each other.	☐	☐
• State the purpose of the meeting and quickly run through the agenda items (if applicable).	☐	☐
• Briefly explain the meeting protocol (i.e. video on/off, everyone on mute, use raise hand function).	☐	☐

During the meeting – remember to focus on the client

Have you asked the client about:

	NEW
• Have you asked the client about:	☐
• Their desired communication style?	☐

	NEW	CURRENT
• their commercial objectives?	☐	☐
• their risk appetite?	☐	☐
• their current matter and any other potential matters?	☐	☐
• what they want from their lawyer?	☐	☐

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During the meeting – remember to focus on the client

Have you asked the client about:

	NEW	CURRENT
• Whether they want us to come and visit them in the future? • What concerns them about the current matter? • What a successful outcome looks like for them? • Whether there are other matters that are relevant to the current matter?	☐	☐
• Whether they want the advice in a particular format and who is the intended audience for the advice?	☐	☐
• Whether they want progress reports and who is the intended audience for those reports?	☐	☐

Does the client know about:

	NEW	CURRENT
• Our capabilities and practice areas?	☐	☐
• How we work with clients?	☐	☐
• how we charge clients (including any concensus pricing options)?	☐	☐
• our CIE Legal values?	☐	☐

Closing the meeting

	NEW	CURRENT
• Check to see if the client has any other questions or concerns.	☐	☐
• Summarise the actionables and estimated time they should hear back from us (including who is responsible for each actionable).	☐	☐
• Summarise the client's 'question' in plain English for the purposesof the advice.	☐	☐

After the meeting

Have you? (Don't forget the human touch!)

	NEW	CURRENT
• Sent a follow-up email to the client summarising any actionables / timeframes that were discussed in the meeting?	☐	☐
• Notified other team members about the agreed actionables?	☐	☐
• Sent a costs agreement to the client (if applicable)?	☐	☐