

Session Title: Improving New Business Intake

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Philosophies and Approaches to New Business Intake

- Risk Tolerance
- Balance

Legal Risks to be Addressed

More complicated than ever...

Emerging Trends

- Staffing (hire staff attorneys?)
- Technology
- Process - Workflow – how to implement? How it makes the process more timely
- Who makes the decisions?
- Closing letters – final payment, files?

Engagement letters from clients and outside counsel guidelines

Processes for Laterals

How can we sell it?

Winning the battle with attorney pushback on the new client intake process and delays.

Resources

- Attorneys' Liability Assurance Society, Inc (great info for members)
<http://www.alas.com/>
- [Model Rules of Professional Conduct - Rule 1.7 Conflict Of Interest: Current Clients](#)
- [Model Rules of Professional Conduct - Rule 1.8 Conflict Of Interest: Current Clients: Specific Rules](#)
- [Model Rules of Professional Conduct - Rule 1.9 Duties to Former Clients](#)
- All three of above from http://www.abanet.org/cpr/mrpc/mrpc_toc.html
- Freivogel on Conflicts, A Guide to Conflicts of Interest for Lawyers
<http://www.freivogelonconflicts.com/>
- ABA/BNA Lawyers' Manual on Professional Conduct subscription
<http://www.bna.com/products/lit/mopc.htm>
- Sample Documents:
<http://www.gilsbar.com/downloads/ConflictsOfInterest.pdf>