

## CLIENT RELATIONS BEST PRACTICES

1. Treat your client with courtesy by:
  - a. Being on time for all appointments.
  - b. Returning telephone calls, or having staff call to explain any delay.
  - c. Completing work as promised, or letting the client know why you cannot, so your client need not resort to nagging you.
  - d. Keeping the client informed of the progress of his or her case by sending copies of documents such as pleadings and correspondence and occasional status reports.
2. Create reasonable expectations. Present a reasonable assessment of your client's case to the client.
3. Explain clearly, confirmed in writing, the scope of your legal services and basis for your legal fee. Carefully confirm in writing whether there are legal matters or tasks you will not handle or which the client or another professional must complete. Provide a detailed checklist of tasks that your client can follow to avoid misunderstandings.
4. Comply with ORPC 1.4, which states: (a) "A lawyer shall keep a client reasonably informed about the status of a matter and promptly comply with reasonable requests for information. (b) A lawyer shall explain a matter to the extent reasonably necessary to permit the client to make informed decisions regarding the representation."
5. Use a written fee agreement and/or engagement letter for all client matters.
6. Comply with ORPC 1.0(g) and 1.8(a) when you engage in a business transaction with a client, to fulfill your ethical duty to disclose.
7. Try to resolve any fee dispute through the Oregon State Bar Fee Dispute Resolution Program, <https://www.osbar.org/feedisputeresolution/index.html> before resorting to suing your client for unpaid fees.
8. Confirm all advice in writing, especially if the client chooses not to follow your advice. Explain alternative options and their potential outcomes, and then allow your client to make an informed decision.
9. Always get your client's express consent before taking any material action that may prejudice your client, such as settling a case, agreeing to a judgment, or dismissing a party.
10. Treat all clients with empathy and practice good listening skills. Active listening confirms that you are listening and understanding your client.
11. If you are struggling with a difficult client, contact the Oregon Attorney Assistance Program (OAAP) for confidential advice at (503) 226-1057 or (800) 321-6227.
12. Always produce a professional work product. Work closely with staff to ensure that all documents, pleadings, correspondence, and client bills are accurate and error-free.
13. Contact the PLF promptly for advice if a claim or potential claim for malpractice develops.

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### **IMPORTANT NOTICES**

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