



CLIENT SERVICE: SETTING EXPECTATIONS CHECKLIST

The following is a list of suggested points critical to maintaining a strong, productive relationship with outside counsel and decision-makers. Clarifying each of these issues at the outset – whether through a formal Request For Proposal process or during the initiation of a specific matter – will ensure that expectations are set and met.

General Policies

- ☐ Corporate and Legal Department mission, culture and philosophy
- ☐ Key corporate contacts
- ☐ Increasing billing rates
- ☐ Charging ancillary services and out-of-pocket expenses
- ☐ Submitting invoices
- ☐ Paying invoices
- ☐ Requesting amendments
- ☐ Selecting and managing subcontractors
- ☐ Changing key staff assignments
- ☐ Evaluating performance

Ongoing Project Management

- ☐ Defining roles and responsibilities
- ☐ Accessibility and responsiveness
- ☐ Preparing and maintaining case workplans
- ☐ Assigning in-house and outside counsel staff
- ☐ Projecting costs and budgeting
- ☐ Reporting project status
- ☐ Identifying and resolving problems
- ☐ Maintaining case files
- ☐ Establishing overall communication and management procedures