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COURSE BROCHURE

Legal Consultation and Client Intake Training Course

29 March – 2 April 2027
Madrid

Legal Consultation and Client Intake Training Course

Ref: 1129_42531 **Date:** 29 March – 2 April 2027 **Location:** Madrid **Fees:** 5600 GBP

Legal Consultation and Client Intake is a 1-week training course for legal advisers and in-house counsel who take instructions, frame the legal question and answer it in writing, building a signed written legal opinion from a realistic client matter. Business units now expect fast, reasoned answers on contracts, disputes and new ventures, and a weak intake meeting produces advice that misses the real question. Jupiter Prime Training delivers legal consultation and client intake.

Why Legal Consultation and Client Intake Matters Now

Three pressures shape advisory work today. Business leaders want reliable, reasoned answers within days. Boards and auditors increasingly ask to see the reasoning behind legal sign-off, not just the conclusion. An adviser who scopes instructions carefully, records assumptions and explains options with their risks protects the organisation from costly surprises; one who answers the wrong question exposes it to disputes and reputational harm. The course rests on recognised professional conduct principles of confidentiality, conflict checking and competence, described in general terms.

Who Gains Most from Legal Consultation and Client Intake

- Advisers who receive first-line business requests and scope them
- Counsel who sign written opinions on contracts and disputes
- Legal officers who triage incoming matters and route them to internal or external specialists
- Compliance and contracts specialists who prepare the factual record behind legal advice
- Practice support leads who design intake forms and matter files

Small in-house legal functions gain most when several advisers attend together and agree one shared intake and opinion standard.

Legal Consultation and Client Intake Capabilities

Participants move from the first client conversation to a reasoned written answer using construction and healthcare case files.

- Conduct a structured intake interview that separates facts, objectives and constraints — the client sponsor
- Apply conflict and confidentiality checks before accepting instructions — the head of legal
- Spot the legal issues hidden in a business request and rank them by exposure — the decision owner
- Weigh options with their legal risk, cost and likelihood of success — the executive approving a course of action
- Draft a written legal opinion with clear assumptions, qualifications and a direct answer — the board or committee
- Communicate unwelcome advice so that the client can act on it — senior management

Key Legal Consultation and Client Intake Terms

- Client intake — the first structured stage of a matter, where the adviser gathers facts, objectives and documents before giving a view.
- Scope of instructions — the agreed boundary of the question the adviser will answer.
- Issue spotting — identifying every legal question raised by a set of facts.
- Written legal opinion — a signed document stating the question, facts relied on, analysis, conclusion and any qualifications.
- Assumptions and qualifications — the stated conditions on which an opinion depends and limits on reliance.
- Options matrix — a table comparing possible courses of action by legal risk, cost, timing and business effect.

Legal Consultation and Client Intake Day by Day

Day 1: The Advisory Relationship and Its Duties

- Role of the In-House Adviser — Where Advice Ends and Business Judgement Begins
- Confidentiality and Privilege Basics — Protecting Advice Shared Across Business Units
- Conflict Checking Routine — Accepting or Declining a New Instruction
- Engagement Letter Elements — Fixing Scope, Timing and Responsibilities Early
- Matter File Structure — Keeping an Audit Trail of Advice Given

Day 2: Running the Client Intake Interview

- Intake Questionnaire Design — Capturing Facts Before Opinions Form
- Active Listening and Probing Questions — Uncovering the Client's Real Objective
- Document Request Lists — Securing Contracts, Correspondence and Records
- Chronology Building — Ordering Events That Drive Legal Exposure
- Scope Confirmation Note — Agreeing the Exact Question to Be Answered

Day 3: Issue Spotting and Legal Research

- Issue Tree Method — Breaking a Business Problem Into Legal Questions
- Exposure Ranking — Deciding Which Issues Need Full Analysis
- Source Hierarchy for Research — Weighing Legislation, Case Law and Contract Terms
- IRAC Reasoning Structure — Linking Rule, Facts and Conclusion
- Gap Log for Missing Facts — Choosing Between Assumption and Further Enquiry

Day 4: Advising on Options and Risk

- Options Matrix — Comparing Courses of Action on Risk and Cost
- Likelihood and Impact Wording — Expressing Legal Risk Without False Precision
- Negotiation Versus Litigation Paths — Recommending the Route for a Dispute
- Delivering Unwelcome Advice — Keeping the Client Engaged With Hard Conclusions
- Escalation to External Counsel — Briefing Specialists Within Budget

Day 5: Practising the Written Legal Opinion

- Opinion Anatomy — Question, Facts, Analysis, Conclusion and Qualifications
- Applying the Intake Record — Testing the Opinion Against Confirmed Facts
- Applying the Issue Tree — Checking Every Question Receives an Answer
- Applying the Options Matrix — Turning Analysis Into a Clear Recommendation
- Signed Written Legal Opinion — Completing the Advice for a Case Matter

Applying Legal Consultation and Client Intake After the Course

- Introduce a one-page intake questionnaire and scope confirmation note for every new legal request.
- Review two recent opinions against the opinion anatomy and agree house wording for qualifications.

Legal Consultation and Client Intake Questions FAQ

What is legal consultation and client intake, and why does it matter now?

Legal consultation and client intake is the discipline of taking instructions, framing the true legal question and answering it in a reasoned written form. It matters now because business units expect fast decisions and boards expect to see the reasoning behind legal sign-off.

Which roles gain most from legal consultation and client intake skills?

In-house counsel and legal advisers who field business requests gain most. Legal officers who triage matters and contracts specialists also benefit.

How does legal consultation and client intake training differ from a legal writing course?

It covers the whole advisory cycle rather than prose alone. It starts at the intake interview and adds issue spotting and options advice before the written opinion.

What do you bring back from legal consultation and client intake training?

You bring back a signed written legal opinion on a case matter, plus an intake questionnaire, issue tree and options matrix ready for house use.

Legal Consultation and Client Intake: The Way Forward

The signed written legal opinion produced on the final day becomes a model for the legal function. Its first use is usually the next contract or dispute question a business unit raises. After that first matter, revisit the intake questionnaire and qualification wording, since they show where instructions were unclear and where the client needed plainer conclusions.