



## **Consumer Law Intake Script:**

### **Introduction:**

1. Greeting: "Hello and thank you for reaching out to [Your Law Firm]. My name is [Your Name], and I'm here to assist you. How can I help you today?"
2. Introduction of the Firm: "Before we proceed, let me briefly introduce [Your Law Firm]. We specialize in consumer law, helping individuals like yourself with various legal issues related to consumer rights and protection."

### **Personal Information:**

3. Full Name: "May I have your full name, please?"
4. Contact Information: "Could you provide your current address, phone number, and email address for our records?"

### **Case Overview:**

5. Nature of the Issue: "Please give me a brief overview of the consumer issue you're facing. What specific problems or concerns prompted you to seek legal assistance?"
6. Timeline: "When did you first encounter this issue, and have there been any recent developments? It would be helpful to understand the timeline of events."

### **Details of the Transaction or Dispute:**

7. Transaction Details: "If applicable, please provide details about the transaction or agreement in question. Include dates, parties involved, and any relevant terms or conditions."
8. Documentation: "Do you have any documentation related to the issue, such as contracts, receipts, emails, or correspondence? If so, please be prepared to share those during our consultation."

### **Attempts to Resolve the Issue:**

9. Previous Actions: "Have you taken any steps to address or resolve the issue on your own? For example, have you contacted the company or party involved, and if so, what was their response?"

### **Legal Assistance History:**



10. Prior Legal Assistance: "Have you sought legal advice or assistance regarding this matter before? If yes, please provide a brief summary of the actions taken and outcomes, if any."

**Additional Information:**

11. Other Relevant Information: "Is there any other information you believe is relevant to your case that we haven't discussed?"

**Next Steps:**

12. Legal Consultation: "Based on the information you've provided, it seems like your case falls within our expertise. We recommend scheduling a consultation with one of our attorneys to discuss your situation in more detail. Are you available for a consultation, and if so, when is a convenient time for you?"

**Conclusion:**

13. Closing Remarks: "Thank you for sharing this information. We will review the details and get back to you promptly. If you have any urgent concerns, please let us know. We look forward to assisting you with your consumer law matter."

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Feel free to adapt this script to suit the specific needs and practices of your law firm.