

# **ISSUE SPOTTING & CASE MANAGEMENT**

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# ABOUT ME

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What do these terms mean?

Issue  
Spotting

Case  
Management

ARE THESE ISSUES  
CONNECTED?

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**THE ANSWER?**

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# CLIENT COMMUNICATION



# Working with Clients



CONFUSION ABOUT LEGAL  
ISSUES



TROUBLE WITH CONSISTENT  
COMMUNICATION



FRUSTRATION WITH  
PROCESS

# Working with Clients with Trauma



Trouble focusing



Missed deadlines



Fear of obtaining assistance



Practice Tips: Be accommodating and keep communication open and often



# ISSUE SPOTTING

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## Hypothetical

- Hypo: Client calls because she is seeking assistance for repairs for her home. The agency is telling her she doesn't own her home, but she purchased the home with her husband who passed away about 6 months ago. Client is confused because she believes she owns the home now.
- You look into the deed records and you learn that she and her husband are both named on the deed, and there is a remaining lien on the property. You also check the tax office, and learn that there is a tax debt of \$5000 pending.
- What legal issues does client have?

# Answers



# Answers

Title  
clearing



# Answers

Title  
clearing

Release  
of lien



# Answers

Title  
clearing

Release  
of lien

Tax  
issues



# Answers

Title clearing

Release of lien

Tax issues

Estate  
planning for  
client

# Answers

Title clearing

Release of lien

Tax issues

Estate  
planning for  
client

Working to  
get disaster  
assistance



# Issue Spotting



TALK TO THE CLIENT



GO IN DEPTH INTO  
ISSUES



THINK OUTSIDE THE  
BOX



**KEEP THE GOAL IN MIND**

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**IT GETS EASIER**

# CASE MANAGEMENT

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**LEARN WHAT  
WORKS FOR  
YOU**



# General Top Tips

Regular case reviews

Don't take too many cases!

Do tasks yourself the first time

Learn how to delegate

Talk to your client often

# How to Prioritize Cases

Squeakiest  
wheel gets  
the grease?

Keep track of  
deadlines

Don't let  
cases get  
stale

# Time Management

Bullet Journal

Weekly to do list

Online task manager





**COMMUNICATE WITH YOUR CLIENT**

**IT GETS EASIER**

QUESTIONS?

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