

Intake and Evaluation Matrix Client Scorecard/Generic Example

FORM 18.06



Directions: Use this form as a screening device for new client intake. Write the number "1" in each blank that is applicable to your client. Each "column" should have only one number in a box. When the matrix is complete, add the numbers from left to right. Place the total in the "Total Per Row" column and multiply by the coefficient to obtain a score for each row. Write the total score in the "Total Score" blank at the bottom of the page. Calculate the "Case Rank" by circling the letter which is closest to the client's "Total Score" using the "Score Box". If applicable, fill in the "Retainer" and "Evergreen" amounts based on the case ranking.

Rank	Cooperation	Case Value	Collectable	Referral Source	Total Per Row
A	High _____	High \$ _____	High _____	Very Good _____	_____ X 1 = Score: _____
B	Medium _____	Medium \$ _____	Medium _____	Good _____	_____ X 2 Score: _____
C	Low _____	Low \$ _____	Low _____	Yellow Pages _____	_____ X 3 Score: _____
D	Very Low _____	Very Low \$ _____	Very Low _____	Yellow Pages _____	_____ X 4 Score: _____

Total Score: _____

Scoring Scale: 8 to 32 point scale

SCORE BOX

(The lower the score, the better. Circle the final rank.)

8 =	Perfect Client with Great Case	Rank = A
16 =	Good Client with Good Case	Rank = B
24 =	Difficult Client with Difficult Case	Rank = C
32 =	Very Difficult Client with Very Difficult Case	Rank = D

Retainer:

Evergreen:

Quarterly Review Questions:

Atty. Time Spent: _____ hrs. x \$ _____ hr. = \$ _____
 Assoc. Time Spent: _____ hrs. x \$ _____ hr. = \$ _____
 Staff Time Spent: _____ hrs. x \$ _____ hr. = \$ _____
 Expenses = \$ _____
 Total Investment to Date \$ _____
 Compare to Budget \$ _____
 Differential \$ _____

Case Evaluation Questions:

1. Upon discovery, have new issues changed the case value?
2. Should the case be routed for completion, litigation, settlement, further research, referral or closure? (Circle One)