

# Legal Advisory and Client Consultation Practice Training Course

6 – 10 September 2027
Porto

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Training Center

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**Ref:** 1761_232404 **Date:** 6 – 10 September 2027 **Location:** Porto **Fees:** 5700 Euro

## Overview

Legal Advisory and Client Consultation Practice Training Course is a one-week practical programme for professionals who need to manage a legal consultation from first contact through documented advice, action, and closure. Participants practise ethical intake, conflict and confidentiality controls, client interviewing, fact and document analysis, issue framing, option and risk evaluation, clear oral and written advice, informed decision support, difficult conversations, follow-up, and matter records. Each participant leaves with a Legal Consultation and Advice File. Agile Leaders Training Center develops client-centred advisory practice.

## Who Should Attend

- In-house counsel and legal advisers responsible for internal or external consultations
- Junior lawyers and paralegals developing client-interviewing and advice skills
- Public-sector legal officers supporting departments, leaders, and service users
- Compliance and governance advisers who communicate legal and regulatory options
- Legal-services managers responsible for consultation quality, supervision, and records

The course teaches a transferable professional method. It does not provide jurisdiction-specific legal advice, establish a lawyer-client relationship, or replace applicable conduct, licensing, confidentiality, conflict, or supervision requirements.

## Departments and Industries

- Legal affairs, general counsel, compliance, governance, and company secretariat
- Government legal departments, regulators, public bodies, and legal-aid services
- Professional services, financial services, healthcare, energy, technology, and regulated industries
- Legal operations, knowledge management, matter intake, and client-care teams

## Learning Objectives

- Structure legal matter intake, conflict checks, confidentiality, scope, and expectations
- Conduct a client interview that identifies facts, objectives, priorities, and constraints
- Test information, documents, assumptions, gaps, urgency, and reliability
- Frame legal issues and build evidence-supported options, risks, and consequences
- Communicate oral and written advice clearly enough to support informed decisions
- Document instructions, decisions, actions, follow-up, supervision, and matter closure

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## Day 1: Ethical Intake and Consultation Scope

- Client, Stakeholder, Authority, and Decision-Maker Map
- Conflict, Independence, Confidentiality, and Security Check
- Urgency, Capacity, Vulnerability, and Accessibility Screen
- Scope, Limits, Fees, Responsibilities, and Communication Agreement
- Consultation Plan and Initial Matter Record

## Day 2: Client Interviewing and Fact Development

- Opening the Interview and Building Professional Trust
- Objectives, Priorities, Constraints, and Desired Outcome Questions
- Chronology, People, Events, Documents, and Evidence Map
- Active Listening, Clarification, Challenge, and Confirmation
- Fact Gap, Reliability, Assumption, and Follow-Up Register

## Day 3: Legal Analysis and Advice Design

- Issue Framing and Applicable Authority Map
- Research Question, Source, Currency, and Quality Control
- Option, Risk, Consequence, Cost, and Timing Matrix
- Recommendation Logic and Scope-of-Competence Check
- Legal Advice Structure and Review Checklist

## Day 4: Advice Communication and Client Decisions

- Plain-Language Oral Advice and Question Handling
- Written Advice, Assumptions, Qualifications, and Next Steps
- Difficult News, Uncertainty, Disagreement, and Expectation Management
- Informed Decision, Instruction, Consent, and Authority Record
- Action Plan, Ownership, Deadline, and Status Communication

## Day 5: Legal Consultation Practice

- Exercise: Screen and Scope a New Legal Matter
- Exercise: Conduct a Structured Client Interview
- Exercise: Build Options, Risks, and a Recommended Course
- Exercise: Deliver Advice and Record the Client Decision
- Capstone Exercise: Legal Consultation and Advice File

## Practical Exercises

- Prepare an intake and consultation plan for a client with incomplete information and competing priorities.
- Interview a simulated client, test the chronology, identify document gaps, and confirm objectives.
- Convert legal and factual analysis into options, risks, consequences, and a proportionate recommendation.
- Deliver unwelcome or uncertain advice, answer questions, confirm instructions, and document next steps.

## FAQs

### What does legal advisory and client consultation practice cover?

It covers the controlled process from ethical intake and client interviewing through analysis, advice, informed decision support, action planning, follow-up, and closure.

### Is this a course on the law of a particular country?

No. It develops transferable consultation and advice methods. Participants must apply their own jurisdiction's law, conduct rules, licensing requirements, and organisational procedures.

### How does a legal consultation differ from giving a quick answer?

A sound consultation confirms authority and scope, elicits objectives and facts, tests gaps and evidence, researches the relevant law, explains options and consequences, and records the decision and next steps.

### How should uncertainty or bad news be communicated?

State what is known, unknown, assumed, and still required; explain consequences and options in clear language; respond sensitively; avoid false certainty; and confirm the client's understanding and decision.

### What is included in the final consultation file?

It includes intake and ethical checks, scope, consultation plan, chronology, evidence and gap records, issues and research, options and risks, advice, instructions, action plan, communications, follow-up, and closure controls.

## Conclusion

Participants leave with a Legal Consultation and Advice File that turns a conversation into a traceable professional process. It supports competent analysis, clear communication, informed client decisions, accountable action, appropriate supervision, and reliable matter records.