

Authentic Lawyering: Practicing from the Heart



**A Coach Approach
Intake Interview**

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Disclaimer

- A Coach Approach to the Practice of Law is not for everyone. Some clients will choose not to play
- Lawyers are not therapists, but we can be coaches
- No one is responsible for what I say but me
- You're entitled to disagree with my method of practice and you won't hurt my feelings if you do
- However, a Coach Approach to the Practice of Law works really well for me, and I invite you to try it to see if it will work for you, as well

A Coach Approach

Intake Interview

Step One:

Ask the client to tell his or her story, and take the time to listen deeply to what they say.

- Ask who, what, when, where, and how questions (Go easy on the why questions)
- Remember Miguel Ruiz's 4 Agreements:
 - Be impeccable with your word
 - Don't take anything personally
 - Assume nothing, and
 - Do your best
- Engage in conversations about choice and the freedom to choose interpretation and significance
- Ask clients questions about their goals, aspirations and dreams

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Step Two:

Once the client has felt heard, ask the client the following Simple Question:

**“Do you believe that you can
change the Past?”**

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Step Three:

Wait for the client to answer the Simple Question. Have patience. After the client acknowledges that the client cannot change the past, then invite the client to play a game with three rules.

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Rule Number One:

Choose to believe that the past is perfect
only because you cannot change it.

Definition of “Choice”

- **Choice** means thinking about and judging the merits of multiple options and then selecting one of them for action

Definition of “Belief”

- **Belief** is a state or habit of mind in which trust or confidence is placed in some person, idea, or thing

Definition of “Past”

- **Past** means having existed or taken place in a period before the present

Definition of “Perfect”

- **Perfect** means entirely without any flaws, defects, or shortcomings

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Rule Number Two:

Choose to believe that everyone always does the best that they possibly can, given the resources they believe are available to them.

Definition of “Everyone”

- **Everyone** is every person; everybody
- **Every** means each and all members of a group *without exception*

Definition of “Always”

- **Always** means every time; on every occasion; *without exception*

Definition of “Best”

- **Best** means the highest quality to be found in a given activity or category of things

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Rule Number Three:

Take 100% responsibility for your life, for your current situation, and for the choices that you have made that led you to your current situation.

Definition of “Taking Responsibility”

- **Taking Responsibility** means accepting personal accountability without anger or resentment, censure or punishment

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Don't forget to remind your client that the game with three rules is just a game

The client is free to play the game for as long or as short a time period as the client wishes



**The Coach-Approach Lawyer
invites the client to
consider 5 possibilities:**

1. The client is always free to choose between alternatives

- The client is constantly choosing, but mostly subconsciously
- Conscious choice allows the client to create and move toward clear goals
- If the client doesn't choose, someone else will choose for the client

2. The life the client lives is largely the result of the choices that the client makes



3. There are advantages to be derived from making conscious choices

- The client makes conscious choices based upon current information
- The client makes subconscious choices based upon information that the client had when the client was a small child

4. Choosing not to dwell on thoughts of anger, sin, guilt and fear has its advantages

- If the client accepts responsibility for the legal challenges the client faces without blaming anyone, the client keeps greater power and control over the outcome
- The client is able to release thoughts of anger, resentment, shame, blame, guilt, anxiety and fear

5. Forgiveness may not be enough

- Forgiveness is just a polite way of blaming and judging
- Curiosity and gratitude just might take you farther
- How did we get here?
- What was the lesson I was supposed to learn?
- AHA! But for this experience, I wouldn't have the wisdom I need to move forward, to grow, to evolve into my full potential

This Year's Theme

Authentic Lawyering

Practicing from the Heart

- Applying a Coach Approach to the practice of law results in close, collaborative relationships between lawyers and their clients
- Working as the client's mentor, counselor and coach, the Coach-Approach Lawyer transforms the lawyer-client relationship into a synergistic forward-thinking collaboration

This Year's Theme

Authentic Lawyering

Practicing from the Heart

- The Coach-Approach Lawyer also transforms the relationships between clients and their counterparts, helping to provide superior results
- The Coach-Approach Lawyer examines with the client how the legal problems arose and what the client might do differently to avoid attracting similar problems in the future

This Year's Theme

Authentic Lawyering

Practicing from the Heart

- The Coach-Approach Lawyer provides the client with new skill sets and with a new way of being that will serve the client long after any particular legal matter has been addressed

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