

Take the Quiz: Is Unbundling Right for You?

By Forrest Mosten

The first step in unbundling is to take the unbundling mindset quiz. Take a few minutes to review how offering unbundled/discrete task/limited scope/coaching legal services matches your personality and professional values and goals.

- ❖ I want to spend more time in direct contact with clients and less time interacting with lawyers on the opposing side or in the courtroom.

- ❖ I am able to give up the control of doing the legal work myself and am comfortable helping clients who do most of the work on their own.

- ❖ I am flexible in changing roles with clients and even adapting to new roles requested by the client (roles that do not conflict with my own professional or personal ethical boundaries).
 - ❖ I am willing to accept payment for current work only and begin an engagement without an advance retainer or deposit.
 - ❖ I like having people get the help they can less "unafford."
 - ❖ I am able to watch clients take my sound advice and make poor or self-destructive decisions--and am willing to help them pick up the pieces and try to make lemonade out of lemons.
 - ❖ I like to teach clients skills and concepts that will make their cases go better--and maybe even improve their lives.
 - ❖ I like to prevent problems from ripening into conflict.

- ❖ I like to reduce my billing load and work on more of a cash-and-carry basis.
 - ❖ I like to have more control over my life and not have to cancel vacations or work nights and weekends.
 - ❖ I am willing to try new approaches that are different than the way I currently practice or even different from the way I was trained.
 - ❖ I like working with people who like to shop for bargains;
 - ❖ I am willing to work with people who may have a high mistrust or disregard for lawyers
 - ❖ I am willing to work with people who have mucked up their legal rights and/or case strategy so that the best that can happen is cutting a loss, rather than gaining a win.

- ❖ I want to provide clients with space in my office to do their own background reading, watch helpful videos, do their own legal research, prepare their own work, or just relax and calm down.

*Reprinted with permission from Forrest S. Mosten, *Unbundling Legal Services* (ABA, 2000).