

Solicitor instruction checklist

Use this to prepare a briefing, after an initial discussion. Agree a suitable channel before sending party details, evidence, or privileged material. This checklist is not an engagement letter or legal advice.

Initial scoping

- ☐ Your firm, the responsible solicitor, and safe contact arrangements.
- ☐ The question to establish, relevant jurisdiction, and type of matter.
- ☐ The deadline, any hearing date, and known urgency or preservation risk.

Conflicts and authority

- ☐ Party and connected-entity details through the agreed channel for conflicts checks.
- ☐ Who instructs, who approves changes, who receives the report, and who pays.
- ☐ Authority to provide each category of material, and any restrictions on its use.

Evidence and scope

- ☐ Material already held, its origin, and whether originals are available.
- ☐ Questions that remain open, competing accounts, and known limitations.
- ☐ Permitted methods, excluded work, safety concerns, and contact restrictions.

Notes for the agreed briefing

Solicitor instruction checklist

Use this to prepare a briefing, after an initial discussion. Agree a suitable channel before sending party details, evidence, or privileged material. This checklist is not an engagement letter or legal advice.

Reporting and handling

- ☐ Intended use, requested report format, exhibits, and any statement requirements.
- ☐ Your directions on confidentiality, privilege, disclosure, retention, and delivery.
- ☐ Any proposed witness attendance or specialist work, subject to separate agreement.

Before work starts

- ☐ Written scope, fees, expenses, spending limit, and reporting timetable agreed.
- ☐ Named points of contact and approval route for changes.
- ☐ Feasibility, conflicts, and acceptance confirmed; no outcome or admissibility guaranteed.

Notes for the agreed briefing
