THE FREELANCER GROWTH LAB

DISCOVERY CALL GUIDE

LEGAL VA

Questions to ask before you pitch, price, or send a proposal

Use this as a guide, not a script. Diagnose first. Recommend second.

HOW TO USE THIS GUIDE

A discovery call is a structured conversation designed to help you understand the client, the problem, the desired outcome, the scope, and whether there is a real fit. Your goal is not to ask every question. Ask the questions that help you diagnose the opportunity clearly.

- Listen more than you speak.
- Ask follow-up questions when answers are vague.
- Take notes on business impact, priorities, scope, and decision process.
- Do not pitch until you understand what the client actually needs.

THE CORE DISCOVERY CALL FLOW

1. CONTEXT

- Can you tell me a little about the business and what you do?
- Who are your main customers or clients?
- What products or services are most important right now?
- What made you start looking for support?

2. CURRENT SITUATION

- How are you currently handling this work?
- Who is responsible for it now?
- What tools or systems are you using?
- What is already working well?
- What feels slow, difficult, or inconsistent?

3. PROBLEM & IMPACT

- What is the biggest challenge you want to solve?
- Where do things usually get delayed or stuck?
- How is this affecting productivity, customer experience, revenue, or growth?
- What happens if nothing changes over the next few months?

4. DESIRED OUTCOME

- What would a successful outcome look like?
- What would you like to be different three months from now?
- What is the highest-priority result?

5. SCOPE & WORKFLOW

- What responsibilities would you like this role to own?
- What still requires your approval?
- Who would I report to or collaborate with?
- What communication and project management tools do you use?
- Are there required working hours, time-zone overlap, or response-time expectations?

6. TIMELINE, BUDGET & DECISION

- When would you like support to begin?
- Are there deadlines, launches, or milestones driving the timing?
- Have you allocated a budget or range for this role/project?
- Who is involved in the final decision?
- What would you need to see before moving forward?

LEGAL VA QUESTION BANK

Use the following role-specific questions to go deeper after you understand the client's general context. Select the questions that match the opportunity.

Practice Context

- What type of legal practice do you operate?
- What areas of law do you handle?
- What jurisdictions do you work in?

Role Scope

- What responsibilities should the Legal VA handle?
- Will the role include intake, scheduling, document formatting, case organization, research support, billing, or CRM updates?
- Which tasks are administrative versus legal work requiring attorney supervision?

Client Intake & Communication

- What information is collected from new clients?
- What qualification steps exist?
- What happens after intake?
- Will the VA communicate directly with clients?
- What may the VA discuss and what must be referred to an attorney?

Documents & Case Management

- What types of documents will the VA work with?
- Are templates available?
- Who reviews documents before use?
- What case management software do you use?
- How are deadlines and filings tracked?

Confidentiality & Security

- What confidentiality requirements apply?
- What information can the VA access?
- Are there security, device, or remote-access requirements?
- How should confidential documents be stored and transmitted?

Billing & Boundaries

- Will the VA assist with timekeeping, invoices, or payment follow-up?
- What work is explicitly outside the VA role?
- Who provides final legal review and approval?

QUESTIONS YOU SHOULD NOT SKIP

- What problem are we solving?
- Why does it matter to the business?
- What result does the client want?
- What exactly would I be responsible for?
- What is outside my responsibility?
- Who will I work with?
- What tools or systems will I use?
- What deadlines or timing constraints exist?

- How will success be measured?
- What is the budget or commercial structure?
- Who makes the final decision?
- What happens next?

DISCOVERY CALL RED FLAGS

- The client expects you to handle everything without defining priorities or scope.
- The client expects unlimited availability or immediate responses at all hours.
- The client repeatedly avoids discussing scope, budget, or decision process.
- The client asks for extensive unpaid work before hiring.
- The client expects guaranteed business outcomes you cannot control.
- The client wants work outside your competence, authority, or professional boundaries.
- The client refuses written agreements, documentation, or basic security practices.
- The client changes expectations repeatedly during the call without acknowledging scope impact.

HOW TO END THE CALL

Do not end with: "Okay, I'll message you."

Instead, summarize what you heard, confirm the main problem and desired outcome, restate the scope discussed, and agree on the next step.

Example close: "Based on what we discussed, your main priority is improving [X] because [Y] is currently affecting [Z]. The support you need mainly involves [A], [B], and [C]. My next step is to review the scope and send you my recommended approach and pricing. I'll send that by [date/time]."

POST-CALL NOTES

Complete this immediately after the call while the details are still fresh.

FIELD	NOTES
Client / Company	
Main Problem	
Business Impact	
Desired Outcome	
Scope Discussed	
Top Priorities	
Tools / Systems	
Timeline	
Budget / Commercial Structure	
Decision Process	
Risks / Red Flags	
Recommended Offer	
Next Action	

REMEMBER: A discovery call is also your opportunity to qualify the client.

Understand the problem -> define the scope -> recommend the solution -> price appropriately -> confirm the next step.