

15 Practical Tips for In-House Counsel to Engage and Work Effectively With External Counsel

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In-house counsel operates at the intersection of law and business. Success is measured not only by legal accuracy but also by how effectively legal advice enables informed decision-making and organizational progress.

The following tips are designed to help **in-house counsel engage external lawyers** more effectively and build stronger, more productive working relationships.



1. Help External Counsel Understand Your Role

In-house counsel acts as a trusted legal advisor and business partner to their organization, best served with a business focused approach.

- Providing legal advice to enable business decisions that consider the **legal landscape and risk culture** of the organization.
- Accountable not only for legal accuracy but also for **commercial outcomes, timelines and cost**.
- Value of legal advice is also measured by **business outcomes** and providing practical business advice.

2. Explain the Business Objective

Advise external counsel of your organization's business objective relating to the legal advice being sought so they can provide practical advice understanding the **business goal your organization** wants to achieve. Explain the desired business outcome and any operational or financial constraints affecting the matter.

For example, if the business has limited bargaining power in a transaction that is necessary for expansion but cannot accept certain operational or financial obligations, external counsel should understand those constraints before drafting or negotiating documents.

3. Set Expectations for Clear Communication

Establish early that advice should be **clear, concise and in plain language**. Prioritize summaries and actionable takeaways that can be shared directly with internal stakeholders. Where possible, ask for practical summaries or key takeaways that help facilitate internal decision making.

4. Treat External Counsel as an Extension of the Team

External counsel are most effective when they understand how they are supporting the broader organization. Consider them as an **extension of your internal team**, sharing timelines, sensitivities and internal dynamics to improve alignment and desired business results.

5. Provide Business Context Early

Provide the broader commercial context, identify key stakeholders, and outline any timing pressures at the outset to facilitate targeted and efficient legal advice.

Encourage external counsel to ask **clarifying questions** before delivering advice to ensure they fully understand the problem and can respond with practical, relevant guidance to you and your organization.

6. Share Your Organization's Risk Tolerance

Every organization approaches risk differently. External counsel may default to highly conservative advice unless they understand how your organization evaluates risk. Explaining your organization's **risk posture and decision-making style** will help external counsel tailor their advice more effectively.

7. Ask for Practical, Business-Focused Advice

Legal analysis delivers the most value when it is tied directly to **business impact**. Encourage external counsel to frame their advice in **operational, financial and strategic terms** so it can be used effectively in business discussions.

8. Request Options With Recommendations

External counsel can sometimes provide detailed analysis without identifying a clear path forward, so encourage them to present **multiple viable options and a recommended path with rationale** to support faster, more informed internal decisions.

9. Encourage Solution-Oriented Thinking

Legal advice should **enable the business to move forward** with the organization's **objectives**. Encourage external counsel to identify compliant paths, propose mitigations or guardrails and suggest practical ways to manage legal. The focus should be on **actionable legal solutions** that allow the organization to progress business objectives efficiently.

10. Reinforce the Role of a Business Enabler

Legal support should facilitate business objectives, not create unnecessary delays. External counsel should **prioritize issues** that materially impact outcomes and help the organization advance while managing risk appropriately. The emphasis is on enabling progress and ensuring legal advice aligns with broader business goals.

11. Provide Constructive Feedback

Clear, timely feedback helps external counsel better understand your expectations and improve their support. Address gaps **promptly, constructively** and reinforce efficiency expectations, including appropriate delegation to junior counsel where budget considerations apply.

12. Monitor and Manage Costs

Set **budgets upfront**, agree on fee structures and request regular updates. External counsel can be expensive if expectations are unclear. Encourage cost-effective approaches, including appropriate delegation to junior counsel or paralegals, without compromising quality.

13. Encourage Proactive Insights

External counsel can add value beyond responding to immediate questions. Encourage them to share **relevant regulatory developments, industry trends or emerging risks** that may affect your organization.

14. Set Expectations for Responsiveness

Define **clear expectations for responsiveness, turnaround times and communication** at the outset. External counsel are often engaged to support capacity constraints, so alignment on these points helps maintain momentum and ensures work progresses efficiently.

15. Conduct a Final Check Before Forwarding Advice

Before sharing advice from external counsel with business stakeholders, consider whether the advice is **clear, practical and aligned with the business problem being addressed**. Advice that can be easily understood and acted upon will be far more effective within the organization.

Based on 15 years' past experience of Christina Vieira Olfert as an in-house counsel, these tips were designed to assist **in-house counsel to engage external counsel** to provide proactive guidance, strategic collaboration and provide legal advice in support of business objectives.

To learn more about Christina and her practice, visit her bio at **Christina Vieira Olfert | Corporate and Commercial Lawyer | TDS Law**.

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