

# How to: Conduct & Structure Client Interviews

in the legal world



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# Structure

It is important to structure the client interview as best you can so that you are not jumping from one area to another, and to prevent the client becoming confused.

## Greeting

Welcome the client (consider if a handshake is appropriate) invite them to sit down and **make them feel comfortable**. If the meeting is longer, consider potentially offering a water/hot drink if this is possible. If there is more than one person ensure that there is enough space/an extra chair and that you have **consent** from the client that they are happy for the other person to be there during the interview. If the client is a child or someone who lacks capacity ensure there is a guardian or person there to act in their interest.

**First impression** is very important, introduce yourself and use some small talk (e.g ask them did they find the office okay, did they travel far, what are their plans for the rest of the day? etc.) Remember the client is likely to be nervous too!

The client could potentially be facing a very difficult period in their life e.g. have recently lost a loved one, going through a divorce, be injured and unable to work etc. Offer condolences if appropriate and recognition of the clients situation.

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## Ask an open question

Why has the client come to see you?

USE OPEN QUESTIONS - to get to the crux of the clients concerns

It is very common in some law firms (especially high street/medium sized firms) for clients to drop in without any prior contact and you may have very little information or none at all concerning why they are there. In order to provide appropriate advice and to conduct the interview efficiently it is **KEY** that you establish **why the client has come to see you?**

**Are you actually able to assist them?** Is their problem a matter you/your firm can provide advice on? Will you need to refer them to another service/or more specialised law firm or business?

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## Listen to your client

This may seem obvious but it is often difficult for legal professionals to sit and just simply listen to what a client has to say as we are often desperate to help/provide advice and support.

However, it is vital that you listen to the client to ensure that you are properly taking into consideration their needs and concerns. You might have been advised that the client is seeking advice on (X) but when you actually then speak to them it may transpire to be something completely different.

Try not to interrupt when the client is speaking, **allow them time to talk**. Use active listening techniques and maintain good eye contact (be careful not to start note taking too quickly or too much). The client should be doing most of the talking at the beginning of the interview.

Nevertheless, although it is important to listen to the client, it is always important to know when it is time to 'politely interrupt' in order to progress the meeting especially if you have a chatty client. You are likely to have limited time and it is important to leave enough time to fact find and summarise.

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## Reassure your client

Once the client has had time to talk about their problem and you have established you are the correct person who can help. You will now need to think about how to phrase your responses to what they have told you. How can you reassure them? It is vital that you instil confidence and allow the client to feel comfortable in your ability to sort out their problem. This is the beginning and a time to lay down the foundation the trust relationship between you and your client.

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## Question the client further

It is important that you question the client further on their problem, but equally important that you find a balance between questioning and what could be seen as 'interrogation' as this will not be responded to well by your client and you will likely lose their interest or they may become irritated. If you feel that the client is unwilling to expand further and is demanding a solution/your advice, make sure you provide an explanation to them as to **WHY** you need this particular piece of information, and why you are asking further questions on the matter.

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## Fact Find

Why has the client come to see you? What is it that they need?

USE CLOSED QUESTIONS

Consider what KEY details you need in order to begin working on the clients matter. This will vary depending on the type of advice they are seeking. For example, if they are looking for advice on a personal injury claim due to being involved in a road traffic accident you may still need the name of the third party driver and their vehicle registration and address. Or maybe the client requires advice following the death of a relative. You may require further details regarding their family, to ask if there is a will or not, or establish the value of their estate. Remember if you do not get everything, or the client is unsure and needs to come back to you to provide the information this is okay. However, it is best practice to fact find as much as possible in the first instance, and prevents you having to continually return to the client to ask them information when it is required at a later stage.

Additionally, it is important at this stage that you **manage their expectations**. Provide approximate timescales if you can, and ensure they know what is involved and how long the process may take to reach a final outcome. Also set out the responsibilities of both you (the legal professional) and the client.

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## Summarise

This is the an opportunity for you to show the client that you have understood the nature of their problem. Summarise the key points of the meeting. Try not to waffle and stick to the main points that they need to know at the outset. Be careful not to go too far ahead into the future as this will likely overwhelm clients. Your aim is to ensure that they leave feeling like their problem is now shared and that you will work with them to achieve the best possible outcome. Don't forget to ask them if they have any questions. But also reinforce that this will not be the last contact opportunity they have with you and they should feel free to ask questions at any stage.

Avoid the use of legal jargon/terminology where possible.

Draw the meeting to an end, summarise the clients concerns and avoid providing advice (if you are not qualified to provide this from the outset or are unsure/need more information) but **explain what you will do** and find out the clients preffered course of action.

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## What do you need from them

Depending on the type of advice you are providing and the matter in hand, you may require documentation to be signed by the client. This could be a client agreement, contracts, mandates, disclosure forms etc. You may also require to see evidence of something that they mentioned during the meeting that will assist with their case. Remind them of this before they leave again so that they provide this to you as soon as possible and it prevents you having to send mutliple chasers.

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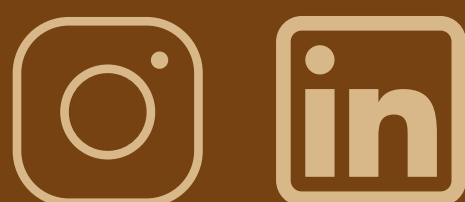
## Thank the client

Thank the client for attending the interview, and provide reassurance that you will be in contact with them soon.

DOUBLE CHECK - you have their contact details and know their preffered method of contact.

If you have benefitted from this resource, have any feedback or would like to see more please let me know.

Feel free to share and connect.



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