

How to conduct an effective first client interview

The main objectives of a first client interview include:

- meeting the client and building trust and rapport as well as setting the framework for the coming relationship
- identifying the client's 'problem' and/or objectives
- gathering information – let the client provide the information – take notes and acknowledge the client
- providing initial advice about options and provide information (as required and only if appropriate)
- confirming the client's instructions
- summing up at the conclusion what the client is to do and what the firm is to do

Before the interview

- Plan your interview. Which of you will undertake which role e.g. introductions, explaining the structure of the interview, commencing obtaining the client's information, summing up at the end etc
- You should appear professional to your client. An unkempt appearance or an untidy meeting room is not only distracting but can also give your client the impression that you are not very professional or organised.

During the interview

- Your client might be anxious, particularly if they are not familiar with the legal system. Introduce yourself with a smile so they feel welcome. Build rapport by engaging in small talk.
- Once everyone is seated and settled, let your client know the structure of interview and that you will be making notes, so they know what to expect.
- The discussion of fees is an integral part of any first consultation. The fee schedule applicable to all terms is that the first consultation is free and any consultations after that will be charged accordingly. (For the purpose of this competition, the competitors' respective law firms charge \$200 per hour). The participants may discuss fees at any appropriate point in the consultation.
- Identify the roles – who will be involved in their matter at the firm e.g. your role, supervisor or partner
- Identify client concerns, expectations and priorities
- Invite them to tell you their story or concerns, preferably in chronological order. Steer the interview by listening actively. Focus on specific areas that are relevant. Your client does not necessarily know what is relevant, but you do. (If not, then in practice maybe you should not be conducting the interview!)
- Take detailed notes.
- Avoid legal jargon, be respectful and maintain a balanced amount of eye contact. You should appear calm and collected, even if you feel stressed or nervous (particularly if it is your first client interview).
- Sum up the interview and what the client has advised (i.e. reframing/paraphrasing and summarising)
- Outline steps going forward. Depending on your technical skills and experience you might be able to give a preliminary view. But if in doubt, explain to your client that you to consider the matter carefully before you can form a view. Whatever you do, do not give legal advice without proper consideration. If you do give advice use tentative words like "it appears..." "it seems that..." "possible action might include" etc
- Ask the client if they have any questions.
- Sum up at the conclusion what the client is to do and what the firm is to do. Confirm instructions. What are the time frames. Will the next communication be initiated by your firm or the client (e.g. follow up letter of advice). (Your next step (if required e.g. letter of advice) should be within the next 24 hours as a general guide). Indicate that this next step will be charged (if relevant).
- Finally ask the client again if they have any further questions for you.

Post Interview

- Refer to competition rules
- Could include:
 - a summary of the facts
 - identification of the client's concerns, expectations and priorities
 - the outcome of the interview - what the client is to do and what the firm is to do
 - any action required by the firm e.g. follow up letter of advice or urgent issues like diarising time frames or limitation periods