

Date: \_\_\_\_\_ Completed for: \_\_\_\_\_

Client: \_\_\_\_\_ Completed by: \_\_\_\_\_

**INTERVIEWING GUIDE****COMMENTS****INTRODUCTION**

- [ ] 1. Begins interview appropriately.
- [ ] 2. Allows client to explain problems, concerns and goals.
- [ ] 3. Summarizes lawyer's understanding of client problem, concerns and goals.
- [ ] 4. Explains preliminary matters and structure of the interview.

**Legend:**

- [√] Satisfactory  
 [M] Marginal  
 [X] Unsatisfactory

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5**HISTORY**

- [ ] 5. Encourages client to relate history of problem using appropriate techniques.
- [ ] 6. Avoids interrupting client with questions except to:
- [ ] (a) clarify;
- [ ] (b) keep client on track; and
- [ ] (c) avoid chronological gaps.

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5**QUESTIONING**

- [ ] 7. Identifies potentially relevant topics.
- [ ] 8. Questions client thoroughly and systematically on each topic to obtain relevant facts.
- [ ] 9. Uses appropriate questioning techniques to motivate and exhaust client's recall of relevant facts.
- [ ] 10. Identifies further facts required.
- [ ] 11. Avoids giving premature legal advice.

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25**ADVISING/CONTENT**

- [ ] 12. Gives a brief introduction to the advising process.
- [ ] 13. Briefly outlines the relevant law.

- [ ] 14. Applies the law to the client's problem by:
- [ ] (a) explaining the client's legal rights or obligations;
  - [ ] (b) outlining the available legal and non-legal options and related procedure; and
  - [ ] (c) identifying and assessing the advantages and disadvantages of each option.
- [ ] 15. Advice given:
- [ ] (a) is accurate;
  - [ ] (b) is realistic;
  - [ ] (c) is not prejudicial to client's interests; and
  - [ ] (d) uses common sense; and
  - [ ] (e) is qualified if necessary.
- [ ] 16. Encourages client to make decision (if appropriate, lawyer makes recommendation).
- [ ] 17. Deals appropriately with ethical issues, if any.

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### ADJOURNING

- [ ] 18. Explains fees (including disbursements, taxes and retainer).
- [ ] 19. Determines if the lawyer is retained, and agrees on terms of payment.
- [ ] 20. If appropriate, refers client to other source of assistance.
- [ ] 21. Confirms a plan which specifies:
- [ ] (a) steps to be taken;
  - [ ] (b) time frames;
  - [ ] (c) methods of obtaining further facts; and
  - [ ] (d) lawyer and client responsibilities.
- [ ] 22. Adjourns interview.

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### PRESENTATION

- [ ] 23. Establishes and maintains rapport with client.
- [ ] 24. Demonstrates effective listening skills.
- [ ] 25. Uses language which:
- [ ] (a) is clear and concise;
  - [ ] (b) avoids legal jargon; and
  - [ ] (c) explains legal terms.
- [ ] 26. Demonstrates courteous and professional attitude.
- [ ] 27. Provides smooth transition between interview stages.

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