THE INTERVIEW PROCESS

The client interview is usually your first contact with the client. The main purpose of this meeting is to gather information and to determine what you are able to do for the client. However, it is also the starting point in establishing your relationship with the client. They have taken the first step in seeking assistance from the Clinic and it is your job to make them feel comfortable and confident in the Clinic's ability to assist them with their problem. The mentor will be present during this initial interview; however, the student's will be taking the lead role.

The process of a typical interview is described below. However, your mentor may wish to proceed differently. Client issues will vary, so your interviewing techniques and questions should be tailored to reflect the unique nature of each situation. Below is a description of how a typical interview may run and the following are a number of questions that have been found to generally apply to a wide range of scenarios. They do not form an exhaustive list and you should incorporate a number of your own questions during your interview with the client in order to gain a thorough understanding of their situation and be of greatest assistance to them.

<u>Prior to the Interview</u>

- Interview times will typically be set up so that mentors and students will have the opportunity to meet and chat prior to meeting with the client.
- Get the mentor's basic information (name, firm they work for) as you will be introducing them to the client later.
- You can also use this time to bounce any ideas off of the mentor or to ask them questions – that is what they are here for.

<u>Commencing the Interview</u>

- Make initial introductions.
- Start off with some brief small talk to make the client feel more comfortable.
- Briefly describe what the Clinic is and what we do.
- Mention that this is an initial information gathering session and that by the end of the interview you should all have a feel for what the client needs done and whether the Clinic can be of any assistance to them.
- Let the client know that you will be doing the majority of work on the file but that the work will be reviewed by the mentor.

<u>Gathering Information</u>

- Complete information fields in "Client Tracking Form"
- Gather the client's information. The student's will lead the interview; however, the mentor can interject with his/her own questions. The following are some sample questions you can use:
  1. What brings you here today?
  2. Can you give me a brief description of your proposed project?
     a. What have you completed already?
     b. What do you hope to accomplish in the near future?
     c. What is your end vision for your project?
  3. Are you working with anyone else on this project?
  4. Are you incorporated? If yes, what is the name of the corporation? If no, what type of business format are you operating with right now? (ie. Partnership, sole proprietorship)

5. Have you received any legal advice as of yet? If yes, what was it?
6. What is your time line? – deadlines you have set for yourself with this project
7. What do you think are the major areas of your project that you require assistance with?
    a. What are your specific issues/concerns that bring you here today? (legal or otherwise)
8. What aspects of your project are firm and which are somewhat flexible?
    a. Do you have any contingency plans?
9. Can you think of anything else I should know?

<u>Adjourning the Interview</u>

- The Client will leave at this point.
- After gathering the information, discuss with the mentor what could be done for the client.

<u>Contacting the Client</u>

- Tell the client what we are able to do for them, how long it is expected to take, and determine if they wish you to proceed.
- Provide the client with your contact information; confirm that you are able to contact them via information provided while completing the “Client Tracking Form”.