LET RIGHT PREVAIL

The Law Society of Upper Canada | Barreau du Haut-Canada

TAB 1

Paralegal Practice Essentials: Criminal Law

Interview Preparation Guide

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October 23, 2013

cpd Continuing Professional Development

Interview Preparation Guide

Issues to consider before meeting with your client include the following:

1. What is the client's reason for consulting the firm?

2. Prior to meeting the client, should you

    a. Conduct any preliminary research to ensure that your first interview will be of assistance to the client?

    b. If so, on what issue(s)? Make brief notes of your preliminary research results.

3. Do you anticipate that you may need to make a referral to other sources of professional assistance for this client, and how will you handle this?

4. Do you anticipate any ethical issues in this interview?

5. How does an effective interviewer start a first meeting with a potential client?

6. What information do you need to provide to the client to ensure that he or she is able to make an informed decision about retaining your services?

7. What will you do to ensure that the client feels sufficiently comfortable to be able to speak openly and honestly about the matter he or she is bringing to you for advice?

8. If you are working in a team, how will you divide up responsibilities during the interview?

9. In a first meeting with a potential client, what kinds of questions are most likely to be effective in giving you a clear picture of the matter that the client is bringing to you?

10. What are the questions you need to be able to answer at the end of a first interview in order to have a clear idea of what the client wants you to do to help him or her? For example,

    a. What is the problem that the client is seeking help in resolving?

    b. What are the client's goals or objectives in relation to this matter?

    c. What does the client want you to do in relation to this matter?

    d. What are the next steps you need to take in relation to this file?

11. What approach will you take to ensure that you have sufficient and reasonably well-organized information by the end of the first interview? For example,

    a. Using summaries to ensure that you have the correct information;

    b. Developing a chronological overview (if appropriate);

    c. Using clarification questions to check understanding and keep the client focused;

    d. Making constant use of active listening and open questions;

    e. Identifying and asking questions about the information that would be required to build a theory of the case.

12. How will you recognize inhibitors that may prevent the client from disclosing information and/or significant needs during the interview? What can you do if this happens?

13. Clarify instructions for drafting a retainer letter if this is the first client interview.