

Communicate with potential clients

Overview

This standard is about establishing initial communication with potential clients to provide them with information relating to the services available to them. It is aimed at people who provide advice and guidance to clients who use services such as public services, education and training, health services and those provided by welfare professionals and others.

The standard covers how to introduce services to clients and how to identify and take action where required.

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Performance criteria

You must be able to:

1. introduce yourself to clients, explaining role and responsibilities in accordance with your organisational procedures
2. gather information from clients in order to assess their needs in accordance with your organisational procedures
3. provide clients with information on services available in line with their needs
4. provide clients with appropriate time and assistance in line with their needs and your remit
5. seek permission from clients to share information with others in accordance with legal, professional and organisational requirements
6. maintain confidentiality and share information in accordance with legal, professional and organisational requirements
7. address the needs of clients using appropriate methods of communication
8. take action to assist clients in line with their needs
9. record interactions in accordance with organisational requirements
10. comply with all relevant legal, professional and organisational requirements and guidelines when communicating with clients

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Knowledge and understanding

You need to know and understand:

1. the importance of complying with relevant legal, professional and organisational requirements and guidelines relevant to your role
2. legislation, codes of practice, organisational policies and procedures in relation to job role/activities undertaken
3. how to introduce self and services to clients in different contexts
4. how to check clients understanding of which services are available
5. how to gather information from clients to assess needs
6. how to create safe environments that will assist clients to express their requirements
7. what constitutes a safe environment for practitioners and clients
8. the principle of confidentiality and the implications for your practice
9. why it is important to assure clients of confidentiality
10. different methods of communication and how to adapt them to suit the needs and preferences of the clients
11. how to minimise effects of difficulties with or barriers to communication and who can provide support
12. actions to take to deal with different situations
13. how to apply the organisational policies and procedures for communicating with clients
14. recording requirements of your organisation, including how to store recorded information securely

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Developed by	Skills for Justice
Version Number	2
Date Approved	February 2015
Indicative Review Date	February 2020
Validity	Current
Status	Original
Originating Organisation	Learning and Skills Improvement Service
Original URN	AG01
Relevant Occupations	Health Professionals; Welfare Benefits Advisors; Public Service Professionals
Suite	Advice and Guidance
Keywords	establish; communication; clients; advice; guidance