
Overview

This standard is about working directly with clients to establish their needs and expectations of services, researching information which is relevant to their situations and providing them with appropriate and accurate legal advice.

**Performance
criteria**

- You must be able to:
- P1 explain to clients the services that you can offer in line with their requirements
 - P2 check that clients' understanding of legal advice services is consistent with information you have provided
 - P3 agree with clients where situations require immediate action in line with their requirements, and:
 - P3.1 take steps to implement this
 - P4 agree next steps with clients in line with their requirements
 - P5 agree further actions with clients in line with their requirements, including:
 - P5.1 procedures
 - P5.2 responsibilities
 - P5.3 time limits
 - P6 analyse available client information to assign relevance to their case in line with your professional judgement
 - P7 review sources of information to assess applicability to clients' situations
 - P8 check that information obtained enables you to advise clients
 - P9 analyse information received from clients and the research process to formulate options in line with clients' needs
 - P10 present clients with information and possible options for action in line with organisational requirements
 - P11 advise clients on the implications of possible options in line with organisational requirements
 - P12 check clients' understanding of the advice offered in line with organisational requirements
 - P13 open client case files in line with organisational procedures
 - P14 design an action plan with clients in line with organisational processes, and:
 - P14.1 agree roles and responsibilities for progressing actions
 - P15 progress actions on behalf of clients in line with agreed timescales
 - P16 evaluate case progress against milestones and outcomes in line with organisational procedures

P17 progress case outcomes to conclusion in line with organisational requirements

P18 record client details and agreed actions in line with organisational requirements

Knowledge and understanding

You need to know and understand:

- K1 the importance of discussing service provision with clients, including any limitations of the service
- K2 situations that require immediate action, and the organisational procedures to follow
- K3 actions that may be required from you and clients and why these are important
- K4 organisational systems and procedures for working with clients, and why it is important to follow these
- K5 the importance of checking clients' understanding
- K6 the importance of agreeing with clients the time limits, responsibilities and procedures for actions
- K7 the types of client information that may be available about cases and why it is important to review this
- K8 relevant national, local, professional and organisational requirements relating to:
 - K8.1 equal opportunities
 - K8.2 discrimination
 - K8.3 health and safety
 - K8.4 security
 - K8.5 confidentiality
 - K8.6 data protection
 - K8.7 conflicts of interest
- K9 the importance of complying with national, local, professional and organisational requirements
- K10 organisational procedures for recording and storing client details
- K11 information sources when researching, including:
 - K10.1 relevant legislation
 - K10.2 case law
 - K10.3 national and local policies and practice
 - K10.4 internal and external colleagues
- K12 the importance of checking that information is accurate and up to date and how to do this

- K13 the importance of obtaining appropriate information and ways of doing this
- K14 the importance of considering organisational procedures and timescales for research
- K15 the importance of advising on the implications of possible options for action
- K16 different ways and formats for providing advice that promote clients' understanding

Additional Information

Skills

The skills you will need to enable you to deliver the service effectively are:

- 1 questioning
- 2 active listening
- 3 negotiating
- 4 summarising
- 5 checking understanding
- 6 decision making
- 7 planning
- 8 problem solving
- 9 presenting information
- 10 recording and storing information
- 11 research
- 12 analysing
- 13 time management
- 14 persuading

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Provide legal advice to clients

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