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**Overview**

This standard is about providing advice to clients on the telephone. Although everyone working in the independent legal advice sector is likely to provide advice by telephone at some point, this standard is about working with clients to give advice on problems where the only contact is by telephone. The standard is about the skills and knowledge needed to establish and maintain contact with clients on the telephone.

**There are three elements**

- 1 Establish the content and nature of calls
- 2 Sustain calls with clients
- 3 End calls with clients

**Performance  
criteria**

**Establish the content and nature of calls**

**You must be able to:**

- P1 respond to clients in line with organisational requirements
- P2 respond to clients in a way that encourages them to express their needs
- P3 identify constraints on clients taking the circumstances of calls into account
- P4 provide correct information about the service and its limitations to clients
- P5 confirm the appropriateness of the service for clients in line with organisational requirements
- P6 encourage clients to share their concerns and focus on their advice needs
- P7 assess whether there are any risks facing clients, and:
  - P7.1 provide appropriate information to help clients minimise risks
- P8 resolve problems with calls in line with organisational requirements
- P9 determine if there is a conflict of interest in advising the client

**Sustain calls with clients**

**You must be able to:**

- P10 provide suitable opportunities for clients to sustain calls
- P11 recognise clients' needs and expectations by acknowledging them
- P12 encourage clients to provide additional information on their situation and needs
- P13 advise clients about the confidentiality of the information they give you
- P14 respond to clients' immediate needs during calls in line with organisational requirements
- P15 provide suitable indications to reassure clients of your continued attention
- P16 respond to clients in line with organisational requirements
- P17 identify signs of increased client stress during calls and establish their significance
- P18 take action to address problems with calls which result in calls being sustained

**End calls with clients**

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### Provide information and advice using the telephone

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- You must be able to:
- P19 provide accurate information to clients on why and when you may end calls
  - P20 agree with clients further actions that could be taken by them and your organisation
  - P21 end calls in line with organisational requirements
  - P22 maintain the confidentiality of clients, self and colleagues in line with organisational requirements
  - P23 record details of contact with clients using the appropriate systems

**Knowledge and understanding**

- You need to know and understand:
- K1 ways of making clients feel welcome on the telephone
  - K2 the different types of telecommunication technology within your organisation and how to use them
  - K3 how to encourage clients to stay connected
  - K4 the types of constraints clients might face
  - K5 why clients may need the service
  - K6 what information about the service should be provided to clients
  - K7 who can be assisted by the service
  - K8 how to encourage clients to provide information
  - K9 the types of risks and dangers different clients may face and how to address them
  - K10 problems that could occur in maintaining calls and how to address them
  - K11 the importance of addressing problems
  - K12 what conflicts of interest may occur and how to deal with them
  - K13 the relevant national, local, professional and organisational requirements relating to:
    - K13.1 equal opportunities
    - K13.2 discrimination
    - K13.3 health and safety
    - K13.4 security
    - K13.5 confidentiality
    - K13.6 data protection
    - K13.7 conflicts of interest
  - K14 the importance of complying with national, local, professional and organisational requirements
  - K15 the types of needs and expectations that clients may have and how to establish them
  - K16 what information should be obtained to enable legal advice to be given
  - K17 how to use the confidentiality of clients to assist them to speak and when this might be useful
  - K18 organisational guidelines and procedures for providing advice to clients over the telephone

- K19 how to recognise the warning signs of increased client stress and what actions to take to minimise them
- K20 when calls should be ended and the reasons for doing so
- K21 what situations are dangerous and who could be in danger

**Additional Information**

**Skills**

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

- 1 active listening
- 2 questioning
- 3 providing information
- 4 identifying options
- 5 summarising
- 6 paraphrasing
- 7 reviewing/reflecting
- 8 negotiating
- 9 evaluating
- 10 summarising
- 11 decision making
- 12 assessing risk

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### Provide information and advice using the telephone

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**Developed by** Skills for Justice

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**Version number** 3

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**Date approved** November 2013

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**Indicative review date** November 2018

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**Validity** Current

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**Status** Original

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**Originating organisation** Skills for Justice

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**Original URN** SFJ ZC5

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**Relevant occupations** Legal Advisers; Legal Associate Professionals

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**Suite** Legal Advice

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**Key words** Give advice on problems; contact with clients; telephone; calls; advice; phone; legal issues; legal problems