

## Develop interactions with clients

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### Overview

This standard is about developing interactions with clients. 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 focuses on establishing and sustaining interactions with clients using a range of media and what further action could be taken when interactions come to an end.

## Develop interactions with clients

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### Performance criteria

You must be able to:

1. select an appropriate form of communication method suitable to the nature of the enquiry and environment for clients
2. create appropriate environments where clients feel comfortable enough to express their issues and concerns
3. agree the purpose and relevant boundaries of interactions with clients
4. establish priorities with clients for achieving their requirements
5. provide information about services and confirm their appropriateness to clients in accordance with their needs
6. respond to clients in ways that encourages them to remain connected to services and that are appropriate to their needs
7. support clients to share their concerns and focus on their requirements in accordance with their needs
8. assess risks or dangers facing clients in accordance with organisational requirements
9. take action to deal with risks or dangers facing clients in accordance with organisational requirements
10. take action to assist clients in line with their needs
11. address problems with maintaining interactions with clients in accordance with organisational requirements
12. confirm the nature and stage of interactions with clients in line with organisational requirements
13. provide suitable opportunities for clients to sustain interactions in ways that meet their needs
14. respond to clients' requirements at each stage during interactions in ways that meet their needs
15. manage inappropriate information given by clients in line with organisational requirements
16. respond to issues in maintaining interactions with clients in line with organisational requirements
17. provide appropriate indications to reassure clients of continued interest in ways that meet their needs
18. support clients to make decisions in line with their needs
19. identify signs of increased stress during interactions and establish their significance
20. manage tensions between time and resources including the requirements of clients in line with their needs
21. allow clients to decide what the next steps will be in line with their needs
22. provide clear opportunities for clients to signal their desire to end interactions

Develop interactions with clients

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23. acknowledge clients' responses about ending interactions in line with their needs
24. identify situations where it would be dangerous or disadvantageous to the interest of clients to terminate interactions
25. provide clients with an appropriate summary of interactions and outcomes
26. confirm opportunities for providing further support for clients in line with their needs
27. end interactions according to organisational procedures
28. comply with all the relevant legal, professional and organisational requirements and guidelines when interacting with clients
29. record interactions in accordance with organisational requirements

Develop interactions with clients

## 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. types of environment appropriate to different clients and activities
4. different methods of communication and how to adapt them to suit the needs and preferences of the clients
5. how to select the most appropriate forms of communication
6. advantages and disadvantages of using different types of media
7. how to encourage clients to stay connected and constraints they may face
8. range of services and agencies available to provide support
9. who can be assisted by services
10. situations which could make clients feel uncomfortable and how to address these
11. the purpose of interactions and how to negotiate boundaries
12. the types of opportunities for exploring issues and different requirements that clients might have
13. barriers that might prevent clients from achieving their requirements and how to overcome them
14. how to encourage clients without face to face interaction
15. how to establish the nature and scope of different issues clients may experience
16. types of information that should be obtained from clients and how to encourage them to provide it
17. types of situations that might occur and actions to take to deal with them
18. how to assess risks or dangers facing clients
19. risks or dangers different clients might face and actions to take to deal with them
20. the importance of addressing problems and implications of not addressing them
21. the stages of interaction when giving information or advice and guidance to different clients
22. types of opportunities that should be made available for sustaining interactions and how to keep clients involved
23. when it is inappropriate to continue interactions
24. types of information that should be obtained from clients and how to encourage them to provide it
25. what might constitute inappropriate information and how to manage it

Develop interactions with clients

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26. the importance of responding to clients at regular intervals
27. the importance of providing clients with opportunities to speak without interruption
28. why it is important to affirm the autonomy of clients
29. what types of indications of reassurance are appropriate and how to provide suitable opportunities for clients to sustain interactions
30. the signs of increased stress in clients and the significance of these signs
31. how much time and resources are available for interactions
32. why it is important to allow clients to decide their next steps
33. what the different responses may be from clients
34. how to summarise interactions to different situations
35. what further activities and sources of support are available that could help clients
36. how clients might signal their desire to end interactions and when to terminate them
37. when interactions should end, reasons for ending them and what further action to take
38. recording requirements of your organisation, including how to store recorded information securely

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| <b>Developed by</b>             | Skills for Justice   |
| <b>Version Number</b>           | 2  |
| <b>Date Approved</b>            | February 2015  |
| <b>Indicative Review Date</b>   | February 2020  |
| <b>Validity</b>                 | Current  |
| <b>Status</b>                   | Original   |
| <b>Originating Organisation</b> | Learning and Skills Improvement Service  |
| <b>Original URN</b>             | AG04   |
| <b>Relevant Occupations</b>     | Public Service Professionals; Housing Advisors; Health, Public Services and Care; Education and training |
| <b>Suite</b>                    | Advice and Guidance  |
| <b>Keywords</b>                 | interact; clients; media   |

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