

Unit Title

LA11 Provide legal advice to clients

Summary

This Unit is for you if your role involves you in working directly with clients to establish their needs and expectations of the service and to provide them with appropriate and accurate legal advice.

The Unit requires you to:

- Explore and analyse the nature of the client's needs
- Research information relevant to the client's situation
- Provide appropriate and accurate advice to meet the client's needs

There are 3 elements:

No	Title
LA11.1	Explore and analyse the nature of the client's needs
LA11.2	Research information relevant to client's situation
LA11.3	Provide appropriate and accurate advice to meet the client's needs

This is a new Unit that has been developed for the Independent Legal Advice Sector. It has been developed in the format agreed for the NOS for Legal Advice.



Element**LA11.1 Explore and analyse the nature of the client's needs****Performance Criteria**

To meet the standard, you must be able to:

- 1 Explain clearly the kind of service you can offer and check client's understanding
- 2 Explore and agree with the client the nature of their advice needs and expectations
- 3 Agree with the client where a situation requires immediate action and take steps to implement this
- 4 Agree next steps with client
- 5 Explain the organisation's systems and procedures for working with the client and check understanding including the limits of service provision and when service may be withdrawn
- 6 Agree with the client the procedures, responsibilities and time limits for further actions
- 7 Review and analyse available client information relevant to their case
- 8 Comply with the relevant legislation, codes of practice, guidelines, and ethical requirements
- 9 Record client details and agreed actions using organisational procedures for recording and storing client details

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

- questioning
- active listening
- negotiating
- summarising
- checking understanding
- decision making
- planning
- problem solving
- presenting information
- recording and storing information

Knowledge and Understanding

To meet the standard, you must know:

- a) The reasons why it is important to discuss service provision with the client, including any limitations of the service
- b) The kind of situation that may require immediate action and the organisational procedures for doing so
- c) The kind of actions (next steps) that might be required from you and /or the client and why these are important
- d) Organisational systems and procedures for working with clients, why it is important to follow these and why it is important to check the client's understanding
- e) Why it is important to agree with the client the time limits, responsibilities and procedures for further actions
- f) The kind of client information that may be available about the case and why it is important to review this
- g) Relevant national, local, professional and organisational requirements relating to equal opportunities, discrimination, health and safety, security, confidentiality, data protection and conflicts of interest
- h) Why it is important to comply with different requirements and the consequences of non-compliance
- i) Organisational procedures for the recording and storing of client details

Element

LA11.2 Research information relevant to the client's situation

Performance Criteria

To meet the standard, you must be able to:

- 1 Identify, review and access sources of information, both internal and external, relevant to the client's situation
- 2 Ensure the information obtained is accurate and up to date
- 3 Ensure that the information obtained is appropriate to enable you to advise the client
- 4 Analyse the information received from the client and the research process and formulate options that could meet client needs
- 5 Work within agreed organisational procedures and time limits for researching information

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

- research
- decision making
- analysing
- planning
- problem solving
- time management

Knowledge and Understanding

To meet the standard, you must know:

- a) The kinds of information sources, including relevant legislation, case law and national and local policies and practice and internal and external colleagues
- b) Why it is important to check that the information is accurate and up to date and ways of doing this
- c) Why it is important to check that you have obtained appropriate information and ways of doing this
- d) Why it is important to consider organisational procedures and timescales for research

Element

LA11.3 Provide appropriate and accurate advice to meet the client's needs

Performance Criteria

To meet the standard, you must be able to:

- 1 Present clients with information and possible options for action
- 2 Advise clients on the implications of possible options
- 3 Provide clients with advice in a manner and format that helps their understanding
- 4 Check the client's understanding of the advice offered
- 5 Agree any further action that needs to be taken by you and/or the client
- 6 Comply with the relevant legislation, codes of practice, guidelines and ethical requirements
- 7 Record client details and agreed actions using organisational procedures for recording and storing client details

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

- questioning
- active listening
- negotiating
- persuading
- decision making
- planning
- problem solving
- presenting information
- checking understanding
- recording and storing information

Knowledge and Understanding

To meet the standard, you must know:

- a) Why it is important to advise on the implications of possible options for action
- b) Different ways and formats for providing appropriate advice
- c) Why it is important to check client understanding and ways of doing this
- d) What additional actions might be required and who will take them
- e) Relevant national, local, professional and organisational requirements relating to equal opportunities, discrimination, health and safety, security, confidentiality, data protection and conflicts of interest
- f) Why it is important to comply with different requirements and the consequences of non-compliance
- g) Organisational procedures for the recording and storing of client details