

Unit Title

LA4 Provide information and advice using the telephone

Summary

This Unit is for you if, as part of your job role, you have responsibility for 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 Unit is about working with a client to give advice on problems where the only contact is by telephone. The Unit is about the skills and knowledge you will need to establish and maintain contact with clients on the telephone and it is likely that you will need to follow the Unit in conjunction with one or more others, e.g. Unit LA3: Develop and manage interviews with clients or Unit LA11: Provide legal advice to clients.

The Unit requires you to:

- Establish the content and nature of the call
- Sustain the call
- End the call

There are 3 elements:

No	Title
LA4.1	Establish the content and nature of the call
LA4.2	Sustain the call
LA4.3	End the call

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 Legal Advice.



Element**LA4.1 Establish the content and nature of the call****Performance Criteria**

To meet the standard, you must be able to:

- 1 Respond to clients promptly according to organisational policies
- 2 Respond to clients in a way that encourages them to express their needs
- 3 Identify any constraints on clients and the circumstances in which the call is being made
- 4 Provide information about the service and its limitations and confirm its appropriateness to the clients
- 5 Encourage clients to share their concerns and to focus on their advice needs
- 6 Assess whether there are any risks or dangers facing the clients and provide appropriate information to help the client minimise the risk
- 7 Identify any problems with maintaining the call and take appropriate action to address them
- 8 Recognise when you may have a conflict of interest in advising the client and how to address the situation in the best interest of the client
- 9 Comply with all relevant legislation, codes of practice, guidelines and ethical requirements

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

- active listening
- questioning
- providing information
- identifying options
- summarising
- paraphrasing
- reviewing/reflecting
- negotiating
- evaluating
- summarising
- decision making
- assessing risk

Knowledge and Understanding

To meet the standard, you must know:

- a) Ways of making clients feel welcome on the telephone
- b) The different kinds of telecommunication technology within your organisation and how to use them
- c) How to encourage clients to stay connected
- d) The kind of constraints clients might face
- e) The kinds of reasons why clients may need the service
- f) What information about the service should be provided
- g) Who can be assisted by the service
- h) How to encourage clients in the absence of face-to-face contact
- i) The kind of risks or dangers different clients might face and how to address them
- j) Problems that could occur in maintaining the call and how to address them
- k) The importance of addressing problems and the implications of not addressing problems
- l) What conflicts of interest may occur and how to deal with them
- m) The relevant national, local, professional and organisational requirements relating to equal opportunities, discrimination, health and safety, security, confidentiality and data protection and why it is important to comply with them

Element**LA4.2 Sustain the call****Performance Criteria**

To meet the standard, you must be able to:

- 1 Provide suitable opportunities for clients to sustain the call
- 2 Recognise and acknowledge clients' needs and expectations
- 3 Encourage clients to provide additional information on their situation or needs
- 4 Enable the client to recognise the value of their anonymity to encourage them to speak where this is appropriate
- 5 Respond to clients' immediate needs at each stage during the call
- 6 Provide suitable indications to reassure clients of continued interest
- 7 Provide responses according to the guidelines and procedures of the organisation
- 8 Identify any signs of increased client stress during calls and establish their significance
- 9 Identify any problems with sustaining calls and take appropriate action to address them

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

- active listening
- questioning
- providing information
- summarising
- reviewing/reflecting
- negotiating
- evaluating
- decision making
- assessing risk

Knowledge and Understanding

To meet the standard, you must know:

- a) The kind of needs and expectations that clients may have and how to establish those of individual clients
- b) What additional information should be obtained
- c) How to use the anonymity of clients to assist them to speak and when this might be useful
- d) Organisational guidelines and procedures for responding to clients
- e) The importance of understanding organisational policies and procedures for handling problems in sustaining calls and how to apply them
- f) How to recognise the warning signs of increased client stress and what actions to take to minimise them

Element**LA4.3 End the call****Performance Criteria**

To meet the standard, you must be able to:

- 1 Provide clear information to the client on why/when you may end the call
- 2 Agree with clients further actions that could be taken by the client and/or your organisation
- 3 End the call according to the guidelines and procedures of the organisation
- 4 Identify situations where it would be dangerous or disadvantageous to the interest of clients to end the call
- 5 Ensure the anonymity of clients, self and colleagues is maintained according to the procedures of the service
- 6 Record details of the contact in the appropriate systems

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

- active listening
- questioning
- providing information
- summarising
- paraphrasing
- reviewing/reflecting
- negotiating
- evaluating
- summarising
- decision making
- assessing risk
- recording and storing information

Knowledge and Understanding

To meet the standard, you must know:

- a) When the call should be ended and the reasons for doing so
- b) What further actions could be taken
- c) What situations are dangerous and who could be in danger
- d) Why and when it is important to maintain anonymity of clients, self and colleagues
- e) Organisational procedures for maintaining anonymity
- f) Organisational guidelines and procedures for ending the call
- g) Organisational systems and procedures for recording contact, why it is important to use them and the consequences of not following them