**Interview plan and structure for a client interview**

Here is an interview plan that you can use and adapt for your client interview. This document sets out the types of things you should cover during your client interview.

**Top tips!**

* This document is for information only. You are free to delete sections that you don’t want to include your plan, and add other sections.
* Bracketed language needs to be tailored to your specific client.
* As each student will have an opportunity to ask questions and take notes, you may find it useful to make a note of who is performing each role at the top of each section.

**Interview plan for [insert client]**

|  |  |
| --- | --- |
| DATE and TIME | XX |
| LOCATION | [in person/video conference, etc.] |
| IN ATTENDANCE | Client: [XX]  Students: [XX, YY] |

**Goals for Meeting:**

* Meet one another and develop a rapport.
* Reach agreement on the scope of legal education needed.
  + Current understanding: Workshop/video on [insert based on PLE sign-up sheet].
* Gather information needed to prepare the workshop/video, including confirming final date, location and equipment (whether online or in person) for workshop.
* Confirm next steps and timeline.

1. **Introduction (5 minutes) [name of student leading this section]**

* Introductions/icebreaking (introduce yourselves and also introduce and explain what qLegal is; can also tell them that you have enjoyed researching the client through [the website]).
* Explain the students’ roles:
  + LLM students at QMUL; our work will be supervised by a qualified lawyer.
  + Our goal is to provide an engaging, interactive final workshop/video.
  + We will each be asking you questions and taking notes.
* Give meeting roadmap:
  + Expected meeting length: 30 minutes; any client time constraints? Please let us know if you need to take a break during the interview.
  + If the meeting is online and you think it would be helpful to record the meeting (because one of the students cannot attend, or to help with note taking), please ask for permission to record and then hit record.

1. **Information about the Client (10 minutes) [name of student leading this section]**

* Please tell us in your own words what your [business/school] does and who you work with.
* Follow up with further questions to clarify the information provided by the client and to fill in any gaps in your understanding:
  + For example: who else is involved, what does the [business/school] do, how does it do that, are there any other key stake holders?
* How do your [clients/students] like to learn? What are their expectations as an audience? What do they already know about the topics? What are their remaining questions? What interactive features do you suggest work best? What have good past [workshops/videos] included?
* Where will the workshop take place? What type of room? What facilities available? (If the workshop is online, is it on Zoom, on Teams, what technology is available for interacting with the audience?

1. **Topic of Workshop/Video (10 minutes) [name of student leading this section]**

* We understand that you would like a [workshop/video about XX]. We are going to ask you for some information that we need to prepare the [workshop/video].
* [Legal Topic 1]
  + [list of relevant fact gathering questions]
* [Legal Topic 2]
  + [list of relevant fact gathering questions]

[Add additional topics as necessary.]

1. **Wrap Up (5 minutes) [roles]**

* To Client: is there anything you would like to discuss that we have not covered? Is there anything else we should know about the location of the workshop?
* To Client: would you like to schedule an additional call closer in time to the final date?
* **Our next steps**: We will research the legal topics and prepare a detailed, practical, interactive [workshop/video] script with help from our solicitor supervisors.
* **Client next steps**: List documents/information client still needs to send to students, if anything. Could be information about the audience or the facilities or about past workshops/videos.
* **Note:** We will be sending a short, online survey to the client/the audience after the workshop (and then again six months and one year later after the workshop) and ask for your help getting those surveys completed as it gives qLegal valuable information about the impact of our work on our clients. Thank you in advance for your help with those surveys.
* Do you have any questions about what will happen next?
* Thank you for taking the time to meet with us. It was a pleasure meeting you, and we look forward to preparing the [workshop/video] for you.