

Interviewer:

Client:

Skill/characteristic	Rating: 0 - not observed 1- inconsistent 2- done well; consistent	Examples/Observations
First interaction		
–is welcoming & friendly; makes connection to previous interactions		
– ice breaking conversation is comfortable and sincere, not awkward, not too long, not		
Description		
– lawyer begins with an accurate, complete and objective description of the case to date		
– lawyer reviews facts with client to assure accuracy & completeness		
– lawyer reviews law with client, including an explanation of how the law applies to the facts		
– lawyer reviews and clarifies the client’s goals, eliciting input from the client to assure that lawyer correctly understands the client’s goals.		
– lawyer clearly outlines available options		
Discussion		
– Lawyer reviews various options with client		
– When appropriate, lawyer seeks input from client about other options that the client is considering and input about client’s views on likely consequences of options		
– Lawyer provides insight about likely consequences of options; doesn’t exaggerate or minimize potential consequences		
– Lawyer discusses both legal and non-legal impact of options (time, money, emotional impact, etc.)		
– Lawyer connects various options to the client’s identified goals		

Skill/characteristic	Rating: 0 - not observed 1- inconsistent 2- done well; consistent	Examples/Observations
– Lawyer presents realistic assessment of likelihood of success of various options		
Decision		
– Lawyer clearly communicates that the decision belongs to the client		
– Lawyer guides client toward a decision without pressuring client		
– Lawyer allows client sufficient time to process information and make a decision		
– A definite decision is reached and stated clearly at the close of the meeting (unless a decision is made to wait, get more information, etc.)		
– Lawyer reviews plan of action with client, including a timeline, at close of meeting (for both lawyer and client)		
– If decision has been made and is being implemented, lawyer assists client in evaluating the decision and suggesting adjustments to strategy or tactics, if appropriate		
General interactions		
–Lawyer uses precise, yet understandable, language		
– Lawyer is sensitive to client’s emotional response to information and decision-making		
– Throughout the interaction, lawyer invites questions from client and responds to them appropriately		
– Lawyer is direct and candid, even if the news is bad and the choices poor		