



## Building Rapport with Clients During the First Meeting: Considerations for Legal Representatives

As a legal representative, establishing a climate of trust and partnership with clients is essential to your effectiveness. This guide will help you think critically about how to use the first client meeting to start building that foundation. Keep in mind that there is no single way to conduct client meetings, so the following is intended as guidance, not strict rules.

### Suggestions for All Client Meetings

- Be conscious of the power differential between you and the client
- Use a conversational tone and create a welcoming environment, smiling as appropriate
- Be mindful that the client may have experienced trauma
- Explain the law and process in understandable terms individually tailored to the client
- At the beginning of the meeting, let the client know what you are planning to cover—and then actually cover that
- Give the client both spoken and unspoken permission to ask questions

- When appropriate, encourage clients to take notes for their own record and understanding



### Give the Client Your Full Attention

Put away your phone, and don't take calls or answer emails during the meeting. If you're taking notes—whether on paper or on your computer—make sure to look up at the client regularly. Explain to the client why you're taking notes and what you will do with them.

## Beginning the First Meeting

### Start with small talk

In many parts of the world, it is considered polite, even in a professional setting, to begin a meeting with small talk before “getting down to business.” Ask a friendly question or make a friendly remark that you feel comfortable with. For example, *How are you today? Did you find the office OK? It’s really cold out this morning!*

### Introduce yourself

Share your name and your role at your organization. If you are an accredited representative, explain what that means. For example, *My name is Michelle Morales. I am an accredited representative with Refugees United. I am not a licensed attorney, but I am certified to prepare all aspects of your case and work on your case just like an attorney. I do not work for the U.S. government or any other government.* In addition, politely confirm the client’s full name and how to pronounce it.

### Give the client a brief roadmap for the meeting

Knowing what to expect during the meeting can help put the client at ease. If you have limited time, state up front how much time you have available to meet. Once you provide the client with a roadmap for the meeting, try your best to stick to it. See the sample roadmap to the right for ideas.

### Explain confidentiality

Explain that in the United States, a legal representative cannot, by law, share any of the client’s information with anyone outside your legal services office without the client’s permission, except in rare circumstances. (Note: Familiarize yourself with your state’s attorney ethics rules to understand what those circumstances are.) When you think it’s important to do so, explain to female clients that you will not share any information with their family, husband, or male relatives, unless they give you permission first.

### Give the client permission to ask questions

Say something like, *Please feel free to interrupt me at any point to ask questions, to ask me to slow down, or to clarify anything for you.* Proactively invite questions by asking, *What questions do you have?* instead of, *Do you have any questions?* Pause regularly to create space for the client to ask questions, and be sure to leave adequate time in the meeting to address them.

Be mindful that the client may need to hear some of your explanations more than once—the client is in a

new country, with customs, culture, and rules that are likely not familiar.

## Sample First Meeting Roadmap

- We’ll get started on your case today, but we probably won’t finish everything. We have about an hour together this morning.
- We will meet at least one more time for you to bring me documents and sign forms. I’ll try to minimize the number of times you have to come into the office in person.
- Today I will be taking notes so I can remember what we talked about.
- We’ll review a contract together and sign it.
- I will ask you some information about yourself and your case.
- Then I’ll explain the legal requirements of the benefit you are asking for.
- Finally, I will make you a list of documents that I need you to gather for our next meeting, and we’ll talk about our next steps.
- I’ll ask you if there’s anything else you want to discuss or if you have any other questions.
- Do you have any questions so far?

## During the Meeting

### Explore the client’s goals and priorities

The first meeting is a time to talk with the client about what specific immigration matter they would like you to help them with. While keeping an open mind, invite the client to share their priorities and the outcome(s) they are hoping for.

Even if you have intake notes or other documentation before the meeting, don’t assume you know exactly what the client wants and what is most important to them. For example, do they want a green card or simply a work permit? If their primary goal is to reunite with family as soon as possible, you might have to first focus on preparing a family reunification case and preparing an adjustment of status application second.

You may want to begin with a simple, open-ended question. For example, *How can I help you?* If the client seems unable to answer that question, try rephrasing it. You can ask, *Why did you come here today?* or *What immigration matter are you hoping I can help you with?* Allow clients to talk for as long as they need to.

### Check for understanding

Once you think you have determined what the client wants, say, *I believe what you're looking for is X.* Give the client space to agree, disagree, or ask questions. Then explain in plain terms what that means. *This means you will apply to Immigration and they will decide whether to approve or deny your application. We will need to fill out forms and gather documents to prove your case.* Explain that you will go over this in detail and will give them a list of what documents and information they need.

### Tips to Consider When Working with Interpreters

- **Look at the client**, not at the interpreter
- **Address the client directly**, in the second person. *I'll be able to help you file your green card application, not, Please tell her I can help her file her green card application.*
- **Speak a few sentences at a time** and wait for the interpreter to interpret them before you move on.
- **Ask the client to do the same.** You will likely need to ask this quite a few times—it is not a natural way to talk. Explain to the client that you do not want to miss anything they are saying.
- Talk with the client and interpreter about keeping any **side conversations** between them to an absolute minimum.
- **If the interpreter you're working with is not a professional**, talk to the client and interpreter about the interpreter's role. The interpreter is your voice in the client's language and the client's voice in English. Emphasize that the interpreter should not add their own voice (i.e., their own words, tone, opinions, or explanations) to the conversation.

### Carefully review the legal services agreement with the client

The first meeting is often when you will need to ask the client to review and sign the legal services agreement—sometimes called a contract or retainer. This document should outline what services you are agreeing to provide for the client, what the client's rights and responsibilities are in the advocate-client relationship, and what your responsibilities are as the advocate. If there are any fees your organization is charging, they should be included in this agreement.

The client may be willing to sign the contract without reading it or understanding it, but we **strongly** recommend reviewing it with the client, ideally out loud during your meeting. As noted above, there is an imbalance of power inherent in the relationship between the U.S.-based legal advocate and the newcomer client seeking free or low-cost legal help. The client may not feel like they are allowed to ask questions about the agreement, or they may be unsure of what to ask. This is a good opportunity to ask the client what questions or concerns they might have.

You can use the legal services contract to help you establish a relationship with the client. If the points below are not covered in your organization's client contract, you may want to consider including them. Either way, it can be very helpful to explain:

- It is important to **not sign anything without knowing what you are signing**
- You must provide me with **truthful information**
  - *Note:* Remind clients that you will not share any information with the government or anyone outside your organization without the client's knowledge and permission
- **My role** is to help you fill out the forms, gather evidence, and submit these to Immigration
- **Your responsibilities** to me include gathering documents, keeping me informed of address or phone number changes, and returning my phone calls or texts
- **After we file the application**, Immigration may request more information, and there is often a fixed deadline for responding. If we don't respond in time, the application can be denied, so it's crucial for me to be able to reach you.
- **I will do my best, but I cannot guarantee** that Immigration will approve the application. I would not take your case unless I thought

there was a reasonable possibility that Immigration would approve it.

- **Once we have submitted the application**, it is out of my control how long it takes Immigration to decide the case.

#### **In addition, make clear:**

- Whether you will or will not accompany the client to their interview
- What fees, if any, the client will be responsible for paying (e.g., fingerprint fees, application fees, translation fees)

Finally, discuss with the client what might lead you or your organization to withdraw from the case.

#### **Explain the law in an understandable way**

Use the simplest, most straightforward words to explain the law and legal process so the client understands it the first time. You can do this in a complete and accurate way without talking down to the client.

The following are some tips to help you do this:

- Think of one legal concept you often explain to clients and how you can make it more understandable
- Consider how you would want a complicated medical diagnosis explained to you so you would understand it the first time
- Replace legal jargon and acronyms with common, everyday words

For example, instead of saying, *We're going to prepare your adjustment of status application and send it to USCIS, who will then adjudicate it*, you might say, *We're going to prepare your green card application and send it to the immigration agency for them to make a decision about it.*

### **Wrapping Up the Meeting**

#### **Create a client to-do list for your next meeting**

As you begin to wrap up, you may want to create a customized printed list to give the client of what documents and information they need to gather to bring to the next meeting. Explain that if there is something on the list they cannot obtain, they should call you to ask if the item is absolutely necessary or if it can be substituted by something else. After you give the list to the client, encourage them to take notes on the actual paper or, if they don't read or write, to possibly record the list in a voice note in their phone. Keep a copy of the list in your file as a reference.

Consider including the following elements in the list:

- Date
- Client's full name
- Application type
- Date of next meeting
- Documents, information, fees, and photographs to bring to the next meeting.

A sample to-do list is provided in the next column.

#### **Sample Client To-Do List**

Date:

Client Name:

Application Type:

Please bring these documents to our next meeting on \_\_\_\_\_.

1. Identity document
2. Asylum approval letter
3. 2 passport-style photos
4. List of addresses where you have lived for the past 5 years, including dates ranges
5. List of places where you have worked for the past 5 years, including addresses and dates ranges
6. Letter from agency that gives you public benefits

#### **Discuss contact information and next steps**

- **Ask the client for the best way to contact them.** Also ask if there is someone else you can contact if you are not able to reach the client (e.g., a family member or friend) who could put you back in contact with the client.
- **Discuss how the client can contact you** and what works best for them (e.g., text, WhatsApp, email, or phone call)
- **Do not share your personal phone number** or email address with clients
- **Set expectations about how long you may take to answer the client**, e.g., *I try to get back to clients within two business days*. Also tell the client **when you are available** to answer their questions (which probably does not include nights, weekends, and holidays).
- **Advise the client how long it will take you to prepare and submit the application.** Clients



often don't consider that you have many other clients and things to do. They may expect you to prepare the forms and submit the documents the next day or within a few days. If it will take longer than that, give them your best estimate of how much time you'll need.

## Conclusion

Taking proactive measures to build trust and rapport with clients is essential, and it begins with the first meeting. Speak with your colleagues about their preferred rapport-building approaches, and consider using the tips discussed in this guide. For example, welcome clients with a friendly greeting; discuss their goals and priorities; encourage them to ask questions; speak in plain language; and check for understanding. By thinking carefully about client interactions, you will be well-positioned to establish a solid foundation for successful legal representation.

## Resources

### Plain Language Resources

[plainlanguage.gov](http://plainlanguage.gov): List of resources on how to use plain language in the legal profession.

[Legal Content in Plain Language: An Example](#):

Michigan Bar Journal article on rewriting legal content in easily understandable language.

[Plain Language Column in the Michigan Bar Journal](#):

The longest-running legal writing column in any journal.

### Active Listening Resources

[Active Listening Skills: Essential Tips for Lawyers and Law Students](#):

Article from Lawyers Concerned for Lawyers on using active listening to build trust with clients.

[How to Develop the Skill of Active Listening](#): Article from *The Practical Lawyer* on using active listening to help promote positive advocate-client relationships.

### Interpretation Resources

[Introduction to Working with Interpreters](#): Switchboard eLearning module for providers who are new to working with interpreters.

[Overcoming Challenges in Interpretation](#): Switchboard eLearning module on supporting interpreters and addressing common challenges.

[Training and Supporting Community Members Serving as Interpreters](#): Switchboard archived webinar on working with and supporting non-professional interpreters from the community.

[Scripts for Working with Interpreters](#): Switchboard tool containing pre-session and introductory sample scripts.

### Trauma Resources

[Developing a Trauma-Informed Consciousness for Legal Practitioners](#): Catholic Legal Immigration Network training for legal practitioners on how to use knowledge about trauma to reduce re-traumatization.

[Interviewing Survivors of Torture and Other Severe Trauma](#): USCIS training for Asylum Officers on being aware of the effects of trauma on asylum applicants.

### Legal Education Resources

[VECINA Online Courses](#): Free online courses on a wide range of immigration law topics.

[CLINIC](#): Toolkits, training, and a resource library on immigration law topics.

[Practicing Law Institute \(PLI\)](#): Learning resources and courses for attorneys and other professionals.

To learn more about  
Switchboard, visit  
[SwitchboardTA.org](http://SwitchboardTA.org).



*The IRC received competitive funding through the U.S. Department of Health and Human Services, Administration for Children and Families, Grant #90RB0052 and Grant #90RB0053. The project is 100% financed by federal funds. The contents of this document are solely the responsibility of the authors and do not necessarily represent the official views of the U.S. Department of Health and Human Services, Administration for Children and Families.*

