

Overview

This standard is about establishing initial communication with potential clients to provide them with information relating to the services available to them. It is aimed at people who provide advice and guidance to clients who use services such as public services, education and training, health services and those provided by community social welfare advice providers and others.

The standard covers how to introduce services to clients and how to identify and take action where required.

Performance criteria

You must be able to:

1. comply with all relevant legal, professional and organisational requirements, policies, procedures and guidelines when communicating with clients
2. introduce yourself to clients, explaining role and responsibilities in accordance with your organisational procedures and the client's needs
3. gather information from clients in order to assess their needs
4. provide clients, using appropriate methods, with information on services available in line with their needs
5. provide clients with time and assistance in line with their needs and your remit
6. seek permission from clients to share information with others in accordance with legal, professional and organisational requirements
7. maintain confidentiality and share information in accordance with legal, professional, and organisational requirements
8. adapt your communication methods to suit the needs, requirements and preferences of clients
9. take action to assist clients in line with their needs
10. record interactions in accordance with organisational and legal requirements.

Knowledge and understanding

You need to know and understand:

1. legislation, codes of practice, organisational requirements, policies and procedures relevant to communicating with potential clients
2. the importance of complying with relevant legal, professional and organisational requirements, policies, procedures and guidelines relevant to your role
3. how to introduce self and services to clients in different contexts
4. how to check clients understanding of which services are available
5. how to gather information from clients to assess needs
6. how to create safe environments that will assist clients to express their requirements
7. what constitutes a safe environment for practitioners and clients
8. the principles of confidentiality and data protection and the implications for your practice
9. why it is important to assure clients of confidentiality
10. different methods of communication and how to adapt them to suit the needs, preferences, and accessibility requirements of clients, ensuring inclusive practices.
11. how to minimise effects of difficulties with or barriers to communication and who can provide support
12. actions to take to deal with a range of different situations
13. how to apply the organisational policies and procedures for communicating with clients
14. organisational and legal recording requirements, including how to store recorded information securely
15. workplace requirements on equality, diversity and inclusion.
16. trauma informed principles and safeguarding requirements

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Communicate with potential clients

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