

## Overview

This standard is about developing interactions with clients. 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 focuses on establishing and sustaining interactions with clients using a range of media and what further action could be taken when interactions come to an end.

## Performance criteria

### *You must be able to:*

1. comply with all the relevant legal, professional and organisational requirements, policies, procedures and guidelines when interacting with clients
2. select an appropriate form of communication method suitable to the nature of the enquiry and environment for clients
3. create appropriate environments where clients feel comfortable enough to express their issues and concerns
4. agree the purpose and relevant boundaries of interactions with clients
5. establish priorities with clients for achieving their requirements
6. provide information about services, explain and confirm their appropriateness to clients in accordance with their needs
7. respond to clients in ways that encourages them to remain engaged with services and that are appropriate to their needs
8. support clients to share their concerns and focus on their requirements
9. assess risks or dangers facing clients and take appropriate action in accordance with organisational requirements
10. take action to assist clients in line with their needs
11. confirm the nature and stage of interactions with clients
12. provide suitable opportunities for clients to sustain interactions in ways that meet their needs
13. respond to clients' requirements at each stage during interactions in ways that meet their needs
14. support clients to make decisions in line with their needs
15. identify and assess signs of increased stress during interactions and take appropriate action
16. balance time and resource constraints with client requirements
17. agree with clients what the next steps will be in line with their requirements
18. provide clear opportunities for clients to signal their desire to end interaction
19. provide clients with an appropriate summary of interactions and outcomes
20. confirm opportunities for providing further support for clients in line with their needs
21. end interactions according to organisational procedures
22. record interactions in accordance with organisational requirements

## Knowledge and understanding

### *You need to know and understand:*

1. legislation, codes of practice, organisational requirements, policies and procedures relevant to your role and responsibilities
2. the importance of complying with relevant legal, professional and organisational requirements, policies, procedures and guidelines relevant to your role
3. types of environment appropriate to different clients and activities
4. different methods of communication and how to adapt them to suit the needs, preferences, and accessibility requirements of clients, ensuring inclusive practices.
5. advantages and disadvantages of using different types of media
6. how to encourage clients to remain engaged and constraints they may face
7. range of services and agencies available to provide support and who can be assisted by them
8. situations which could make clients feel uncomfortable and how to address these
9. the purpose of interactions and how to negotiate boundaries
10. the types of opportunities for exploring issues and different requirements that clients might have
11. barriers that might prevent clients from achieving their requirements and how to overcome them
12. types of information that should be obtained from clients and how to encourage them to provide it
13. types of situations that might occur and actions to take to deal with them
14. how to assess risks or dangers facing clients and actions to take to deal with them
15. the stages of interaction when giving information or advice and guidance to different clients
16. types of opportunities that should be made available for sustaining interactions and how to keep clients involved
17. when it is inappropriate to continue interactions
18. what might constitute inappropriate information and how to manage it
19. the importance of responding to clients at regular intervals
20. the importance of providing clients with opportunities to speak without interruption
21. why it is important to affirm the autonomy of clients
22. the signs of increased stress in clients and how to respond

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23. how much time and resources are available for interactions
24. why it is important to ensure clients decide their next steps
25. what the different responses may be from clients
26. how to summarise interactions to different situations
27. what further activities and sources of support are available that could help clients
28. when interactions should end, reasons for ending them and what further action to take.
29. how to identify situations where it would be dangerous or disadvantageous to the interest of clients to terminate interactions
30. organisational and legal recording requirements, including how to store recorded information securely
31. workplace requirements on equality, diversity and inclusion
32. trauma informed principles and safeguarding requirements

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**Suite** Advice and Guidance

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