CHAPTER 5

INTERVIEWING TRANSACTIONAL & PROJECT CLIENTS

Why Teach Interviewing a Transactional or Project Client in the Clinic Seminar?

This chapter offers specialized materials designed for interviewing the "client" in non–litigation-based clinical programs. Project and transactional clients pose special management and ethical issues that will likely cut across all student field work. Students are likely to be taken by surprise if they have not been given an opportunity to think about and experience the special problems that arise when interviewing clients in a non-litigation context. Unlike in individual litigation, where the client goals are fairly clear and often focus on a favorable outcome in court, non-litigation representation can be amorphous and seek a variety of results. Sometimes it is even difficult to identify who actually is the "client." This confusion can raise significant ethical issues about decisional authority, attorney–client privilege, and scope of representation. These issues are best addressed in the seminar, where all students can learn to identify and respond appropriately before problems arise in their field work.

In addition, fundamental questions inherent in the development of transaction and project work commonly arise in the interviewing context. Some of these questions can be discussed and answered in an initial interview. Other questions may get raised but need to be answered after further investigation. Such questions include the following:

- Based on what you know about the project, what direction makes sense for this client or client group?
- What tactics and strategies are possible?
- What externalities might be essential to client counseling?
- What is the best use of a lawyer, as opposed to community members, community organizers, or others, when addressing the problem at issue?
- What product makes the most sense as the end result of the legal work?

By raising these questions in seminar, a clinician creates an opportunity for students to gain insight into commonalities that exist across their work and to collaborate with their colleagues and teachers in preparation for an initial interview.

Factors to Consider in Planning a Seminar Class on Transactional or Project Client Interviewing

Why is interviewing a transactional or project client different from interviewing an individual client? Transactional, international, intellectual property, large case/impact litigation, and policy and legislation clinics often involve student work on "projects," rather than the representation of individual clients. Most teaching materials generally available assume an individualized model of representation, focused on discrete legal problems. As a result, many more "typical" clinical topics are an uneasy fit with the skill set required to effectively manage a project. Perhaps the greatest teaching challenge for clinicians engaged in project work is to help students gain an appreciation of the difference between their own work and that of direct representation.

The client interview exemplifies this challenge. Although an understanding of client interviewing techniques is essential regardless of clinic subject matter, most teaching exercises fail to address numerous issues that arise when the client is an organization, rather than an individual. For example, a student representing an organization or groups must initially determine precisely who the "client" actually is, and accordingly, whose goals should control the representation, because these fundamental questions often determine what information is relevant or what material they are likely to have a direct impact on the interviewing process

Reading Assignment

1. Paul R. Tremblay, *Counseling Community Groups,* 17 CLIN. L.REV. 389 (2010).

Assignment in Preparation for Class

Before class, review any material that you believe might be useful to gain insight into your client, your client's particular goals for the work in the clinic, your client's larger goals and how your work might fit with the client's larger goals. Share this information and your thoughts about it with fellow team members before class. In class we will be planning an initial interview with your client. This information will help you frame how you will approach that interview.

Learning Goals

The possible learning goals for a seminar focused on project client interviewing may include the following:

Interview Planning

- Helping students identify their own goals for the first client meeting.

  To assess learning in relation to this goal, look for student behaviors such as:

  - A concrete plan for introductions
  - A list of meeting goals
  - Identification of the need for flexibility to allow for responsiveness to the client's expressed needs
  - Realistic goals that anticipate future client meetings
  - A concrete plan for ways to communicate with the client in the future

- Helping students identify and help prioritize client goals for the transaction or project.

  Look for:

- Research on the organization's purpose and mission
- Research on prior conversations about the nature and scope of the clinic's representation
- Articulation of ways in which the work requested might enhance client goals
- An interview plan that is flexible and designed to probe client goals
- Questions designed to clarify goals as initially stated by the client

- Helping students appreciate the importance of planning and reflection.

  Look for:

  - A plan that anticipates gathering information and reflecting on it before building solutions
  - Recognition that clients insist on "answers" or "solutions," and a plan for explaining the importance of a more deliberate process

Conducting the Interview

- Helping students develop the attorney–client relationship.

  Look for:

  - Warm-up questions and general conversation designed to promote the attorney–client relationship
  - Efforts to achieve clarity about who has decision-making authority within the client organization or group

- Helping students learn how to probe for information and manage client expectations.

  Look for:

  - Questions that leave room for extensive client response
  - Avoidance of leading questions
  - Clear statements about expectations
  - Avoidance of over-promising
  - Identification of moments when the client seeks more than the student can provide
  - Identification and discussion of next steps

Common Student Misunderstandings

Students often come to transactional and project clinics with the mistaken assumption that the scope and content of their work will be defined by statutes, rules, and cases, as is the case in more traditional litigation clinics. They expect that their client representation will have a consistent, predictable trajectory, externally imposed deadlines, and a clear set of lawyering tasks that must be accomplished. They do not realize that in fact, they themselves will need to create and define the nature and scope of the legal work, choosing among numerous options in service of a multitude of client goals.

Students may also misunderstand the probable nature of the relationship between a transactional or project lawyer and his client. Many unconsciously assume that they will be dealing with clients who are individuals, live in poverty, are unsophisticated about how to approach the challenge at hand, and are reluctant to assume decisional authority. In fact, transactional and project clients typically are organizations or loosely formed groups, and often have expertise that students lack. This difference often gives rise to complex issues around privilege, decisional authority, power dynamics, and a broad range of professional ethical issues, none of which the students are expecting when they enter clinic.

Finally, few students come to clinic thinking they can become a "wise adviser" to a sophisticated client in a situation where outcomes are ill-defined and malleable. It is quite possible, however, that this role will be thrust upon them in a transactional or project-based clinic. As a result students will be forced to reconsider their assumptions about the limits on their abilities.

Planning the Class

Set Up Prior to Class

The clinician will need to bring poster paper and pens to class. Ask students to sit with their clinic teams.

Introductory Lecture

Tell the students that the class will focus on the challenges of interviewing their transactional or project client. The exercises are designed to help them clarify their goals for their first client interview, develop an initial plan for conducting the interview, and consider their goals for that first meeting. The questions they considered for the pre-class assignment will serve as a framework.

PROJECT INTERVIEWING I
DISCUSSION OF TRANSACTIONAL OR PROJECT-SPECIFIC GOALS AS WELL AS BROADER CLIENT GOALS

Assignment

Small Groups

Break the students into small groups. Explain that the class will begin with a small group discussion of their client's goals for the particular transaction or project on which the students expect to work, and how those goals relate to the client's broader, bigger-picture goals. Tell them that it is often in this first interview that a lawyer gains insight into the client's goals. This can be the most important outcome of an initial contact.

Ask the students to discuss the following questions within their small groups:

Learning Goal: Identify the client's goals for the project.

Learning Goal: Identify the information needed from the client and the information the students want to convey to the client.

Prompts

- What are your client's specific goals for the clinic project or transaction?
- Other than as a solution to a particular problem, why is your client interested in the legal work the clinic will be doing?
- Do you have information about your client's broader goals, beyond the scope of the proposed clinic project or transaction?
    - If not, how might you try to determine those goals?
- What impact might the client's broader goals have on the specific direction of the clinic project?
- Conversely, how might your work on the specific clinic project affect the client's larger goals?

  - If you do not know, how might you explore this in your initial interview?

Full Group Report Back

Bring the class together as a whole group and hold a debrief based on their small group discussion.

Prompts

- What are your client's goals for this specific project?
- What are your client's broader goals?
- How do you know what those broader goals might be?
- How can you find out more about those goals?

Small Groups

Ask the students to return to their teams and instruct them to choose one member who will take notes. Explain that they have been focusing on orienting themselves about how their project or transactional work fits into the bigger picture of the client's goals. Now you will be asking them to focus more narrowly and think through the client's goals as well as the clinic team's goals for an initial client meeting. Use the prompts below to frame the small group discussion.

Learning Goal: Identify their own goals for the first client meeting.

Learning Goal: Clarify and prioritize client goals.

Learning Goal: Develop the attorney–client relationship.

Prompts

- What do you anticipate are your client's top three goals for the first meeting?
- What is your collective sense of your team's top three goals for the meeting?
- Are there any conflicts, tensions, or differences between your client's and your own goals for the initial meeting?
- How will you deal with any differences in these two sets of goals?

- If so, how do you plan to handle the difference in expectations?
- How can you use this conversation to build an attorney–client relationship?

Full Group Report Back

Ask the students to return to the full group. Conduct a debriefing discussion, using the prompts below. At this early point in the semester, the students may be eager to identify all of these possible solutions for their clients' problems. In this class, focus on whether the students are trying to generate solutions rather than focusing on the information they may need to appreciate the problem and gain clarity on goal definition. For example, a student may say, "I think my client can provide more services in this area by getting a zoning variance." Getting a zoning variance is a solution. As the teacher, shift the student to problem definition and goals by asking, "What does your client want to do? Who does your client want to serve? What role does your client want to play in this project?" These types of questions will refocus the students on the underlying goals. You may want to remind the students that it is only through really understanding client goals that we can help craft effective solutions. As each team identifies their top three goals, write them briefly on the board. Leave room to put all of the teams' goals on the board. When conducting the interview below, it may be important for the students to reference other teams' goals in order to understand context.

Prompts

- What three goals did your team identify as important to you?
- How does each of the three goals you have identified fit with what you believe are your client's goals for this meeting?
- What kind of attorney–client relationship do you want to establish?

PROJECT INTERVIEWING II
INTERVIEW PLANNING

Assignment

Small Groups

Ask the students to return to their teams. Assign each team one segment of an initial client interview (as defined below).

Segments to Assign

1. Opening and Identifying Role
2. Eliciting Information about Goals
3. Clarifying Client Priorities
4. Closing the interview

NOTE: If the clinic is divided into fewer than four teams, collapse groups two and three above into a single group. If the clinic is divided into more than four teams, add a group that is focused either on building the attorney–client relationship, or on clarifying client expectations.

Ask the students to take 10 minutes to plan their team's segment of an initial client interview. Explain that when they return to the full group, each team will be asked to conduct a role-play of their interview segment. Provide each group with the targeted prompts below to help them focus. These are included in the student text designated as "Handout for Group Planning."

Learning Goal: Appreciate the importance of planning and reflection.

Group 1: Opening and Identifying Role

Prompts

- What will be the first thing you will say to your client?
- How will you describe your role?

- How will you ascertain who the “real” client is for purposes of this representation?
- How will you describe your ethical obligations as your client’s lawyer?

Group 2: Eliciting Client Information about Goals

Prompts

- What information is critical for you to understand your client’s goals?
- What questions might you ask and how might you ask them, in an effort to elicit this information?
- What assumptions, if any, might the client have that need to be addressed or deconstructed as part of the effort to understand the client’s goals?

Group 3: Clarifying Client Priorities: Using the information provided to distill the goals and establish direction.

Prompts

- How will you help the client identify what is most important to her?
- How will you ascertain whether this client speaks for the whole group as to priorities?
- How might you ensure that you and your client have similar expectations about the work you will be doing?

Group 4: Closing the Interview

Prompts

- How do you plan to close the interview with your client?
- What do you expect will be the next steps?
- How do you address how much notice and control the client will want over contacts with others on his behalf?
- How do you expect to communicate with this client in the future?
- How will you plan for that future communication?

Role-Play and Debrief

Return to the full group. Tell the students that each team will now have the opportunity to role-play a conversation with their client, beginning with Group 1 and moving consecutively through the rest of the groups. The client for each segment will be played by the clinician. If the students are working on different projects, remind the students that during this simulated interview, the client will change as each team changes. Remind the students that as each segment changes the clinician will become the next team's client. This may result in an interview that does not flow as a single client interview might flow, but the issues raised are likely to be similar. Remind the students to think about what they have already learned in discussion about each team's top goals.

In addition, divide each team not participating in a particular role-play segment in half. One half should focus on substantive questions, and one half should focus on form questions as they observe the segments (these questions are included as handouts for the students). For each segment, the divided teams should alternate, first doing either substance- or process-focused observation and then switching to the other.

Handout for Observers

Substance Feedback

- What difficult issues arose during this part of the interview?
- How did the students address the issues?
- Did the students appear to have or did they develop sufficient information to deal with the issues?
- Did the client seem satisfied?
- Did any ethical issues arise that needed to be addressed?
- If so, how were they handled?

Process Feedback

- How are questions framed?
- Do the questions leave room for the client to respond?
- Are follow-up questions being asked?
- What role do you perceive the students to be taking on?
    - Are they acting as information gatherers?
    - Are they assisting in setting expectations?

- Are their questions helping the client identify and prioritize goals?
- What efforts are being made to bolster the attorney–client relationship?

Be clear with the students doing the role-play that they are not to stray into another group's "territory," and stop them if they do.

When acting as client, it may be useful for the clinician to inject challenges for the students to grapple with that are typical for students in your particular clinical program. These issues and the way in which the students respond to them can be productively discussed during the debriefing conversations. Suggestions for challenges to raise are offered below:

> **Group 1:** During this segment, the students should introduce themselves and begin establishing an attorney–client relationship. The substance of the particular project is not a part of this segment so if students begin to probe goals, tell them that those issues will be raised by the next team. There are some issues that may enrich this segment and can be planted by the clinician in the role as client.
>
> - *Create confusion about decisional authority*. Mention other members of the group who may have an interest in this project or refer to boards of directors, or suggest that there is someone who supervisors the client. (Ultimately the client has been given specific authority to make decisions for the group and will be the point of contact.)
> - *Create confusion about who "the client" is*. Mention that this is a newly formed group and that there is some disagreement about whether this project should move forward. (Ultimately make clear that the group has voted to move forward)
> - *Create professional responsibility issues*. At some point ask the student if the information you will be providing will be kept confidential. (This is an attorney–client relationship and would protect client confidences from disclosure to external parties and would also cover members of the group represented who have some decisional authority, along the lines of a corporation's attorney–client and work-product privilege.)

- *Test the student's appreciation of their role in unclear circumstances.* The client could ask almost immediately for help with a legal problem that just arose but that is not a part of the representation the clinic is able to provide. For example, the client might say that someone in his family had just been arrested; can the students help with that? Similarly, the client might express substantial concern about being represented by students rather than full-fledged attorneys.

Prompts for Debrief

- How do you set limits on what your role will be for the client this semester?
- How do you deal with the fact that you are students?
- How do you ensure that the client knows this is an attorney–client relationship?
- How do you identify who will have decisional authority, i.e., who your client is?

Group 2: During this portion of the interview, the client should be talking broadly about the goals and expectations for the representation. If the students should stray into trying to get a sense of the client's priorities, tell them that those issues will be raised by the next team. There are some issues that may enrich this segment and can be planted by the clinician in the role as client.

- *Give the students an opportunity to elicit more specificity and clarity from the client.* The client can begin by being extremely vague about the goals for the transaction or project.
- *Give students an opportunity to deconstruct assumptions.* When talking about the overall goal, say something like, "I want this to be a comprehensive approach," or, "This project will really build community."
- *Begin the process of teaching students about how to manage client expectations.* When talking about the overall goal, say something like, "This project will really be the lynchpin in solving this problem."

Prompts for Debrief

- What are some of the techniques you might use to focus your client on more specific, reality-based goals?
- Are there any assumptions that are implicit in your client's responses?
- How do you deconstruct those assumptions?

Group 3: In this segment, the students should be moving the client toward more clarity about priorities. If the students start discussing next steps, stop them and remind them that that segment is for the next team. There are some issues that may enrich this segment and can be planted by the clinician in the role as client.

- *If not adequately raised in the previous segment, force the issue of managing client expectations.* The client could state unrealistic expectations about the amount of work the students can accomplish during the semester, tempting the students to over-promise.
- *Help students focus on client-centeredness in the project setting.* As the client, identify several priorities and ask the students to tell you which is most important, or identify an unrealistic goal as your top priority and ask the students what they think about your ordering.
- *Help the students assert themselves as value-added in this representation.* As the client, question the students' knowledge base in the area, and identify several small secretarial-type tasks for them to do, avoiding anything that requires judgment.

Prompts for Debrief

- How do you ensure that your client directs the goals of the project?
- How do you ensure that you can provide wise counsel for your client?
- How do you manage your client's expectations?
- What is the scope of your representation, and how do you communicate those limits to the client?

Group 4: In this segment, the students should be closing the interview, ensuring that they have a well-developed communication plan and are able to articulate reasonable next steps in their work for the client. There are some issues that may enrich this segment and can be planted by the clinician in the role as client.

- Provide an opportunity for your students to resist promising more than they can deliver. The client could create pressure for the students to identify exactly what they will do next to move the client's agenda forward or to make decisions before the students have sufficient information to do so.
- Ensure that your students create a reasonable communication plan that is neither too burdensome nor too lax. The client might express an unwillingness to meet regularly during the clinic semester when the students are enrolled or the client may resist if the students propose a plan that seems too demanding.
- Ensure that there is clarity about next steps. If the students seem to be closing the interview without next steps, the client could say, "Okay, I will expect a draft plan by next Tuesday," or ask, "What is going to happen between now and the next time we meet?"
- Inject professional responsibility issues into the discussion. If the students identify next steps that include talking to third parties, the client might say, "I do not want you telling them about my plan." (The client has a say in what information is shared with third parties, but this may require clarifying how much authority to disclose that the students have or need.) Or the client might say, "See if you can get information from them about what they are planning. Don't tell them you are working with me." (This raises issues about a lawyer's duty to third parties and creates an opportunity to discuss the role they will be playing with the client generally).

Prompts for Debrief

- What is a realistic communication plan for the semester, and how can you communicate the importance of that communication?

- How do you respectfully resist when a client is asking you to make immediate decisions that you have not had time to consider?
- How can you use the closing of the interview to ensure that you and your client are clear about next steps?

After each group does its section, break and have the group provide feedback using the process and substance handouts and the particular prompts for the segment. During the debriefing discussion, when students suggest an approach different from the one actually used, it may be useful to have that student try it out in a role-play format, before moving onto the next segment.

Wrap Up

Interviewing project clients poses special challenges that we have seen today in class. We started with some of the most challenging professional responsibility issues. Who is your client? Who has authority to make ultimate decisions? What is your role as a lawyer in this project? Whenever a lawyer acts as a representative of a client, it is important to attend to the relationship in the initial interview. Often it is in this first encounter where norms and boundaries are either explicitly or implicitly established. Listening to the client, demonstrating respect, and looking for the facts that undergird conclusions are basic building blocks to a successful relationship and a solid understanding of legal issues. Planning, always an important lawyering skill, may become even more important in the project setting. In a non-litigation setting, there usually are no statutes or regulations that can help structure an interview. Client goals may be less clear when the legal issues are not discrete and the forum does not define the limits of relevant facts. Gaining clarity about those goals may define much of the initial interaction with the organizational client.

Post-Class Assignment

Now that you have given some thought to interviewing your project client, respond to the following questions, which are designed to provide a template for an initial client interview. After you have given them some thought, meet with your project team and work through them together to prepare for your initial client interview.

1. Think about your initial meeting with your transactional or project client from the client's perspective.
    a. What information does your client need from you in the context of this meeting?
    b. What value do you think your client wishes you to add to their work?
    c. What concerns or questions do you think your client will have regarding the client's relationship with your team?
    d. What questions or concerns is your client likely to share with you?
    e. What is your client less likely to share?

2. Think about your initial meeting with your project client from your own perspective:
    a. What are your top three goals for the meeting?
    b. What value do you think you will add for your client?
    c. What concerns or questions do you have regarding your team's relationship with your client?
    d. Think about questions or concerns you may share with the client, as well as those you may not share with your client.
    e. What do you anticipate your next steps will be after this first meeting?

3. Identify who you are likely to be speaking with when you hold the transactional or project client interview.
    a. Who is this person in the context of the client organization
    b. What is this person's stake in this project?
4. Identify what your client's likely goals for the project will be. Focus on the following:
    a. Goals that relate specifically to the problem or problems that your project seeks to address.
    b. Broader goals that your client is likely to have, including institutional and personal goals.

Connecting Back to Client Representation

End-of-Class Learning Prompts

Reserve 10 minutes at the end of class to pose the following learning prompts and encourage group discussion:

- How has this class affected your thinking about your initial client meeting?
- Was the planning that you did in class different than the planning you have been doing as a team?
    - What was different, and how?
- What concrete insights have you gained about what work your team needs to do between now and your initial client meeting?

End-of-Class Critical Incident Questionnaire

Reserve 5 minutes at the end of class. Distribute index cards and ask each student to reflect on the following: Think about your small group discussions during class. Identify one moment where you felt heard by your team and one moment when you did not.

- What was going on at each of these moments?
- What conditions were present when you felt heard?
- What conditions hampered communication?
- How might these insights inform your planning for your first meeting with your client?

Either simply collect and review the cards, or post the responses electronically (or otherwise distribute them) to the entire group.

Post-Class Reflection Memo

After the in-class role-play interview, ask the students to look at the top three goals they identified as important to accomplish in the first interview. Based on their observations in class, ask them write a reflection memo after class which addresses the following questions:

- Are your goals too ambitious?
- Too narrow?
- Given what you learned during the role-play, how would you restructure your goals?
    - Why?

Consider distributing the memos (or posting them electronically) so that the students can learn from each other.

Targeted Rounds

It is all but inevitable that students will find that they have difficulty getting clarity on how to proceed with a project and what information they need to get from their client to do so. This may be due to any number of things, including a failure to ask the "right" questions, client vagueness, students' feeling that there is no order in the chaos of facts they encounter, or the existence of an aggressive client who knows far more than the students do. All of these experiences are ripe for a rounds discussion and are likely to help other students who face similar issues in dealing with organizational clients. In preparation for a rounds class on these issues, ask the students to reflect on their initial client interview before class, and ask them to consider the following:

- Were there moments in which you felt that the interview was chaotic or lacking in precision?
    - What was happening during that time?
    - What was the subject matter?
    - How did you approach managing that chaos?

A traditional aspect of initial individual client interviewing is a discussion of ethical issues such as confidentiality and privilege with organizational clients. In a transactional or project-based clinic, this discussion is more complex, and other professional rules are likely to come into play, such as, "Who is the client?" "What are my obligations to third parties?" and, "Are my conversations with my client privileged?" These are complex and interesting discussions not fully covered in this set of exercises, and they may deserve a full class on their own. These issues can be raised in a rounds format and are likely to be of interest to all of the students. If you decide to have a rounds session on these issues, before the session, ask the students to reflect on the following:

- In your project work, whom do you look to for decisional authority?
    - How do you know that person gets to decide the direction of the work?
- How does the attorney–client privilege work in your relationship with your client?

- Did you discuss the privilege?
- How did you describe that ethical obligation?

Teaching Methods

This class uses the students' actual field work as the vehicle for learning about interviewing the organization client. Students are sometimes frustrated when a class focuses on a complex hypothetical, leaving them to work through the issues from scratch when they turn back to their own clinic clients. Students are often more receptive to learning in the context of exercises that actually move their field work forward. In lieu of a lecture on the importance of goal setting and planning, the class requires the students to engage in this activity in a step-by-step and rigorous way. The questions that are raised in the pre-class assignment and throughout the class can serve as a template for their field work with organizational clients.

The exercise in class uses stages in the interview for each group to focus on so that each performance elicits a potentially new insight and builds on others' performances, and it does not "privilege" (from the student's perspective) those students who perform later in the class. Having the clinician play the client ensures that certain challenges can be created that serve as points of learning. If the clinician is the only instructor in the classroom, being the client precludes recording specific feedback. By playing the client, the clinician can create opportunities to address typical interviewing problems by injecting those problems and controlling the flow of the interview. Permitting the students to give feedback to each other and using focused questions attempts to minimize this problem. Ideally, there are two instructors, one of whom plays the client while the other takes careful notes of the students' performances.

Doing this class before the students actually engage in their initial client interview can help the students prepare for issues that they may not have considered. They will be more likely to manage the amorphous nature of much of project work and explore some of their assumptions about who their client is. The questions posed by the students in the real interview are likely to be more sophisticated after this kind of preparation and rigorous in thinking about their own goals and the potential goals for the project and for the client. The students are also much less likely to over-promise if they have given some thought to managing client expectations.

Opportunities for Transfer of Learning

Seminar

The insights about the importance of planning that come out of this class arise in virtually all of the other seminar classes. This class begins the process of gaining clarity on client goals that will be woven into seminar classes on informal fact investigation, storytelling, and case theory.

Prompts

- Think back to the class on project client interviewing. How does the information you gained about identifying your client goals affect how you approach the subject we are focusing on today?

Supervision

The work that occurs in this class should move the students forward in their client representation work. Supervision will likely focus on discussions of what they learned that will assist them in their initial interview with the client, and on how to revise their plan in light of insights gained in the class. Both before and after the actual initial interview, it can be useful to review the planning that occurred during class and in the post-class assignment, to evaluate how effective and accurate the team's planning process was.

Prompts

- **Before the interview:** How have the insights you gained during class affected your interview plan?
    - Can you anticipate any professional issues that might arise and have you planned how you will raise and resolve them?
    - Have you thought about your communication plan for your client and what you anticipate the next steps to be?
- **After the interview:** Now that you have conducted your initial interview, how effective and accurate do you believe your planning process was?
- What might you do differently next time you have an initial meeting with a client? Next time you meet with your current client?