

Call Management techniques

All CLCs in Queensland have different practices and procedures around intake and triage for clients.

If you are considering implementing this into your CLC, please think about the ways this can be integrated with your current practice with Outlook and CLASS.

Where the word is **highlighted**, it indicates that the client should bring this documentation to their appointment. This can also be found in the [‘Email templates – what clients need to bring’](#) document. Where the script is **red**, you may choose to use this wording or personalise it.

1. Answering the phone and managing client expectations

[See also ‘script – Taking calls and booking appointments’](#)

Remembering clients are often in a particularly vulnerable state when they first contact a CLC, it is critical we manage their expectations about the first conversation as front line workers. This will ensure we are working within a trauma informed framework, guaranteeing the client does not have to continually repeat their story, and protecting your own wellbeing.

When you answer the phone, it is important you state your name and your organisation. Callers want to know who they’re speaking with, it’s important for rapport building and general comfort levels during a stressful time.

Example-

‘Community Legal Centres Queensland, Sam speaking, thank you for calling.’

‘I will let you know, I am not a lawyer and cannot give you advice, I will take some details to see whether we can help you so I’m going to ask you some questions’.

By stating from the outset that you are not the lawyer they will discuss their legal issues with, it prevents the client from telling their story unnecessarily, which can be both taxing and traumatising.

Both together

“XX community legal centre, NAME speaking, thank you for calling.

I will let you know before you tell your story that I am not a lawyer, and I can’t give you any advice. I don’t want you to have to tell your story a number of times, I understand that can be draining. If you’d like to be booked in for legal advice, I’ll ask you a couple of questions to see whether we can help- if we can’t help I’ll make sure we give you some other options”.

[Write your own:](#)

2. Establishing rapport

Simple tips can help to create trust and rapport quickly with a client over the phone. Using their name can help the client to feel heard. You can write it on a scrap piece of paper beside you if it helps.

Additionally, using a calm voice, even when the client is escalating, is modelling how you would like to be spoken to, and will help to de-escalate a caller who is upset.

3. Questions

It is your duty to make sure you do a conflict check before taking too much information from the client. See also 'Conflict Scripts'.

When we want to encourage someone to talk to us we use open-ended questions: who? what? where? when? how? and why? Quite simply we ask a question that will elicit information. You may also want to establish safety before you continue the call.

Example-

- *Who am I speaking with to?/ What was your name, I'm sorry I didn't catch it.*
- *How can we help you today?*
- *What was your legal issue about?*
- *Where are you calling from?*
- *Is it safe for you to speak right now?*

4. Closed questioning frontline staff

When frontline staff are answering the initial client phone call (not performing a detailed triage) asking closed questions is an efficient way of gathering the information you need without traumatising the client or taking too much information (and ensuring you are complying with the Risk Management Guide). Ask closed questions to elicit the specific information. Closed questions give you 'yes', 'no' or minimal word answers.

Example-

- *Have court proceedings started?*
- *Is there a current court order in place?*
- *Have you been charged? Have you been to your 1st court date?*
- *How many children are there from the relationship?*
- *Have you had any legal advice about this before? Who?*
- *Is there a court date coming up?*

Asking specific closed questions will help you to determine whether or not you can help the caller. See '[Questions Flowchart](#)' for more questions by legal issue.

5. Consequence questioning

Consequence questioning can help where there have been indicators throughout the call that the client may not necessarily fall into a vulnerability category, or the legal issue may be something which the centre might send a standard 'how to guide' for. It can help to ensure the client is not falling through a gap.

Example-

Where the client is working and calling regarding a neighbourhood dispute.

Asking the client 'what is the consequence if this continues' may elicit a response that indicates they may be at risk. The client may need some help identifying this. Some questions might include some 'worst case scenario' options:

- *Are you in immediate danger or concerned for your safety? Is your safety at risk?*
- *Have you or anyone in your family been injured as a result of this conflict? Or could you be?*
- *Has any property been damaged? Or is it at risk?*
- *What is your biggest concern (worry?)*
- *Will you be kicked out of your home?*
- *Will you default on a payment?*
- *Is there a court date coming up?*

In this example, if the client says '*the neighbour is abusive, and I am concerned for my safety*' they may benefit from getting advice about a peace and good behaviour order.

Consequence questioning allows us to determine whether the outcome of their legal issue might end up putting them into a vulnerability category if it was to progress. This line of questioning may help to manage client expectations and open a conversation that CLCs work is targeted to vulnerable clients if its required.

6. Call control

Sometimes, even with closed questions, clients may start to give too much information, particularly clients who are heightened, or clients who have trouble communicating or concentrating. You can use the suggestions below to take control of the call again-

Example-

Interrupting –

- *Sir/madam/name of client, I'm going to/can I stop you there for a moment?*
- *Can you please help me understand what you meant when you said (bring them back to the issue at hand)?*

Ending the call or progressing-

Thank you. I have enough information to know we can help. I'll book you in for a legal advice.

Next steps

Your lawyer will provide you with information and advice.

Putting a client on hold

In limited circumstances it may also be necessary to place the client on hold for a moment to interject safely. This is usually when you have a client who may be escalating or abusive. You can tell the client you need to place them on hold for a moment and you will be right with them.

7. Putting someone on hold

When a call must be put on hold, ask the client if it is ok to put them on hold or if they would prefer a call back. Be upfront and tell the caller why you need to place them on hold or call them back. This allows the client to feel as though they have control over the progression of the call, and most will ask to be placed on a short hold. When you return, be sure to thank them for waiting.

8. Taking a message

If you are taking a message, it is critical you take the following details:

- Client name
- Contact details
- Is it safe to announce it is the legal centre calling back?
- When they would prefer to be contacted
- Who they need to speak with
- Reason for calling

9. Terminating the call

If you have followed the steps above 'setting expectations' and 'call control' and the client is becoming verbally abusive or disrespectful, you can terminate the call. You do not need to tolerate poor behaviour. Additionally, if a client is particularly insistent that the CLC 'needs' to help them with a particular issue, you can use some of the examples below.

Avoid statements like 'don't get angry with me' or 'it's not my fault'. It's not personal, so don't take it personally. Do not react to anger with anger, stay calm, explain that you are there to help and remember you are in control. If you keep your voice slow and calm, the client could mirror you and start to de-escalate.

Here are some ways to do this, while keeping yourself emotionally safe.

Example-

- I can hear that you're upset, and I would like to help you, but I need you to stop yelling/swearing so I can do that
- If you continue to swear/raise your voice/ be disrespectful I am going to need to terminate the call
- I'm afraid I'm going to have to disconnect the call if you continue to use abusive language
- You are being abusive/threatening and now I am hanging up/ terminating the call
- As I've told you before, that's not something we can help with, so I am terminating the call

Please note, if you have taken a call that has been upsetting or triggering in any way, it is important to debrief this with your Supervisor, Principal Solicitor or discuss your concerns with the EAP available in your centre.

10. Making a booking

[See also 'script for frontline staff'](#)

When making a legal advice booking, it is important to include some critical details in the advice booking notes to ensure the lawyer has a brief overview of the legal issue. This can help with service continuity and improve the client experience overall.

Determine whether the caller (and any dependents) require immediate emergency services

1. Type of advice
 - a. Telephone advice
 - b. Face to face advice
2. Date of advice appointment
3. Area of law
4. Documents required
 - a. Is client bringing documents or emailing?
 - b. Have you given them a list of what to bring?
5. Any other relevant detail
 - a. Interpreter required?
 - b. Support person?
 - c. Where were they referred from?
6. Summary of legal issue

Recording the time

Depending on your procedures, you may also find it beneficial to record the amount of time it took to do the intake/take the call. This can be useful information for staff training.

To record this information you may choose to do so in CLASS by adding an additional drop down tab to an intake. If you are unsure how to do this, you can lodge an IT request with CLCA and they can help you do this, so CLCQ may be able to provide you with a resource.

Writing your notes shorthand

It can be difficult to listen and take comprehensive notes when speaking to a client for the first time, so using a shorthand can be helpful for both frontline workers as well as lawyers or other staff who need to be able to gauge the matter at a quick glance.

For example-

FAM – NIC 10/9/21 for mention. 3 CH (8,10,12, live w/ CI). DVO in place, CI agg.

The client has 3 children, ages 8, 10 and 12. She is currently going through family court, and has a court date coming up for a mention on 10 September 2021. The children live with her, there is also domestic violence in the relationship and an order in place where she is the aggrieved.

If these details are stored in outlook, you do not need to retype them, they can be copied and pasted into the clients notes in CLASS