

QLS Innovation Committee – Hybrid work taskforce

Considerations for Clients

Building Rapport

- ☐ What is the format of your client interviews and intake process, can this be done remotely and not lose opportunity to build rapport?
 - ☐ Are there options for clients (and coverage) if a client wishes to attend a meeting in person? (i.e. should this always still be offered when possible). What are your clients requirements and expectations in relation to how meetings will occur (i.e. online or in person)?
 - ☐ Have you considered client needs to provide instructions face to face when initially meeting with a Solicitor to ensure they are heard and understood
 - ☐ What are your non-negotiables (i.e. how many times should you meet with your client in person and what types of meetings/ engagements should be held in person)?
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Maintaining relationships

- ☐ Do you have criteria for which meetings throughout your engagement with your client can take place in person v remotely?
 - ☐ What is your policy for returning phone calls inside standard office hours if your team is working flexible hours from home?
 - ☐ Have you set expectations for clients as to when their Solicitor is physically present in the office so that they understand when their Solicitor is only available remotely?
 - ☐ Do you have flexibility in being able to undertake online meetings in various platforms (e.g. MS Teams, Zoom etc)?
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Witnessing Documents

- ☐ Do you still always have someone present at your offices who is suitably qualified to witness documents if necessary?
- ☐ Are your professional staff trained in the remote witnessing of affidavits and similar documents?