A Paralegal’s Guide to Forming Client Interview Questionnaires

If you have been responsible for conducting in-depth interviews with clients, then you probably have developed an information-gathering system that works for you. If so, stick to it and make adjustments in the kinds of questions and in the way you gather the information as necessary. If you don’t have much experience in client, witness, or defendant interviewing techniques, then review the following section with your own caseload in mind. Some of the questions of course won’t apply exactly to the cases in your office, and some won’t relate to the type of law practiced by your attorneys. Still, you’ll notice from the flow of the questions how it is possible to gather most of the information you’ll need in just a short period of time.

What follows is a primer on interviewing techniques. As always, take what works for you and create your own standard client or witness questionnaires to match your needs. Even if you ask the same questions time after time and even if you feel you know them by heart, consider devising some type of standard questionnaire to help you remember to ask everything the first time. If you don’t already use a written list, simply create one to fit the type of case you’re handling.

Interviewing a client is usually a smooth process. In most cases, clients are receptive to your questions because they usually recognize the importance of cooperation for the success of the case. However, keep in mind that even though most clients want to help you, they may feel uncomfortable about being in an attorney’s office.

People usually deal with attorneys only when something is wrong or up in the air—an injury, a lawsuit, a bankruptcy, a divorce, a criminal charge, probate, a lease deal, etc. They may feel particularly intimidated when they first arrive at an attorney’s office, especially if it’s filled with expensive art, furniture, or law books, like law offices they’ve seen in the movies or on TV.

Remember to make the client feel welcome and comfortable. Going to an attorney is a matter of choice. If it’s not you, it could be someone else. Always remember that clients are really customers and deserve special treatment.

Once the client is with you, be aware of typical conversation barriers, like a large desk, that can inhibit the flow of communication. Sit face to face if you can, without a big desk in front of you. If both of you sit across a small table, you can still take notes, but it doesn’t feel so daunting.

Sample Client Interview Questions

Using a common personal injury car-accident client as an example, consider the following list of questions for your next client interview:

1. What was the date and time of the accident?
2. Where did the accident happen? Freeway? Surface streets?
3. In what direction was the client going?
4. In what direction was the other driver going?
5. Was weather or darkness a factor in the accident?
6. Is there a police report?
7. If so, by what agency? Local police? Sheriff? State Highway Patrol?
8. If not, why not?
9. What did the officer say to the client?
10. What did the officer say to the other driver?
11. How many cars were involved in the accident?
12. How many people were involved in the accident?
13. Any pedestrians? Small children? Motorcycle or bike riders?
14. What kind of car was the client driving?
15. Who owns the car?
16. Who insures the car? (Company, policy number, agent, etc.)
17. How did the accident happen? Rear-end? Broadsided on the driver or passenger side? Head-on collision? Side-swipe?
18. How much damage was done to the car?
19. Does the client have a damage estimate yet?
20. Has the client notified his or her insurance company? The Department of Motor Vehicles?
21. What kind of car was the defendant driving?
22. Who owns the defendant’s car?
23. Who insures the defendant’s car? (Company, policy number, agent, etc.)
24. How much damage was done to the defendant’s car?
25. Did the defendant make any statements or admit fault?
26. Were there any witnesses?
27. Does the client have any witness names and telephone numbers?
28. Does the client have any photos of the accident scene or either vehicle?
29. Can the client make a brief diagram of the scene?
30. How was the client injured in the accident?
31. Did the client seek treatment after the accident?
32. Does the client have medical payment coverage?
33. Does the client have a family doctor?
34. Has the client lost time from work because of the accident?
35. Has the client been in any other accidents?

While this isn’t the most complete questionnaire on the subject, it does cover most of the critical information you’ll need to begin working on the case.

You’ll notice that some of the questions lead into others and others get answered during the discussions. If you find this list helpful and aren’t already using a preprinted version of it, consider creating a similar questionnaire to handle the personal injury auto-accident cases that come to your office.

You can modify this questionnaire to cover most slip-and-fall accidents, worker’s compensation accidents, or other injury- or insurance- related incidents, Continuing with our client interview questions, let’s assume now that the client you need to interview was arrested on a criminal charge. Here are some questions you may want to ask:

1. What was the date and time of arrest?
2. What are the charges?
3. Which law enforcement agency made the arrest? Local police? Sheriff? State Highway Patrol?
4. Does the client have a copy of the police report yet?
5. What chemical tests (if any) did the client submit to? Breath? Blood? Urine?
6. What are the results of those tests?
7. Did the police impound any evidence, like the client’s car?
8. Was the client injured in the arrest process?
9. If so, was the client treated at a local hospital?
10. Was the client booked into jail or released with a citation?
11. If so, when is the court date?
12. Did the client make bail?
13. Were any of the client’s friends at the scene?
14. Are there any independent witnesses to the crime or arrest?
15. What were the circumstances of the arrest?
16. What probable cause did the officer(s) use, i.e., the reason for the original stop and contact?
17. Was the client arraigned?
18. If so, under what charges?
19. Does the client have a prior criminal history?
20. Is the client on parole or probation?

The questions should give you a good place to start during the criminal defense client interview process. Other questions will surely come to mind as you talk to the client.

After taking careful notes of the client’s answers and remarks, you should thank him or her for coming in and promise to get in touch again very soon. You can imagine how apprehensive a client can feel after a car accident, an arrest, or a worker’s compensation accident, or with a large business, real estate, or family law matter on the line.

See the following articles for more information:
21 Major Interview Mistakes to Avoid at All Costs
The Best Way to Prepare for a Job Search and Interviews
How to Talk About Other Interviews in Your Interviews
How to Answer the Tell Me About Yourself Interview Question
How to Answer the Do You Have Any Questions for Me Interview Question

Please see the following articles for more information about paralegals and paralegal jobs:

- Qualifications and Responsibilities of a Paralegal
- The Questions to Expect During a Paralegal Job Interview
- The Virtual Paralegal Allows Paralegals to Work at Home or Offsite
- Independent Paralegals sought by Legal Firms on Contract basis
- Paralegal Licensing and Regulation: Part I-The "Pros"
- Paralegal Licensing and Regulation: Part II-The "Cons"
- Tips for Becoming a Successful Paralegal
- Male Paralegals: Is There Really a Glass Elevator?
- Honoring and Celebrating Paralegals untiring behind the scene work
- 10 Good Reasons to Become a Paralegal
- Practical Billing Tips for Paralegals
- What Does it Take to Become a Paralegal?
- A Cover Letter is Considered to Be an Important Asset While Applying for a Paralegal Job
- Various Types of Paralegal Jobs
- How Important is ABA Approval for Paralegal Programs?
- The Life and Career of Tracie Goodwin: Paralegal to Attorney
- Creating an Exceptional Paralegal Resume