Start with a **roadmap** frame that provides a transition from the client’s initial overview of the problem to a detailed exploration of several **topics/sub-topics**. Also, periodically provide **signposts** to orient the client to the process described in the initial roadmap.

- **T-funnel frame to initiate the exploration of topic #1**
  - Follow-up efforts to encourage the narrative or to gather info using open questions
  - Follow-up closed/open questions to gather more facts & legally relevant info.
  - Use of summary to check your understanding of the client’s facts
  - Anything else question to precede transition to next t-funnel topic.
  - Transition to move to next t-funnel topic

- **T-funnel frame to initiate the exploration of topic #2**
  - Follow-up efforts to encourage the narrative or to gather info using open questions
  - Follow-up closed/open questions to gather more facts & legally relevant info.
  - Use of summary to check your understanding of the client’s facts
  - Anything else question to precede transition to next t-funnel topic.
  - Transition to move to next t-funnel topic

- **T-funnel frame to initiate the exploration of topic #3**
  - Follow-up efforts to encourage the narrative or to gather info using open questions
  - Follow-up closed/open questions to gather more facts & legally relevant info.
  - Use of summary to check your understanding of the client’s facts
  - Anything else question to precede transition to next t-funnel topic.
  - Transition to move to next t-funnel topic

**Transition to move to next interview segment**
Preliminary Problem Identification, Detailed Fact Gathering, and Theory Development—employing the T-funnel technique:

The T-funnel information-gathering technique can be used in many ways and is especially appropriate to use during the PPI, DFG, and Theory Development portions of an interview. Here’s a general description of the process:

- **Roadmap** a transition from the client’s initial overview of the problem to the various T-funnel topics.
- Successively pursue each T-funnel topic in the order you specify in your original roadmap statement. In each case, frame an initial request for information about the topic that ends with an open question.
- For each topic, apply the T-funnel method until the topic is exhausted. Your lower T questioning may include both open and closed questions on relevant factual and legal issues.
- **Summarize** your understanding of what the client told you at the end of each T-funnel sequence to make certain that you correctly understood the information provided by the client.
- Take notes to record the information relayed to you by the client, including notes of questions you would like to ask the client's during the lower portions of the “T.”
- Concentrate on the content of the client’s statements and **work** to understand what the client is telling you.
- If the occasion arises, use a signpost to remind the client of the current topic.
- At the end of each T-funnel loop, confirm that the client has given you all available information and provide a transition to conclude each T-Funnel before moving to the next T-funnel.
You will aim to demonstrate the abilities to:

- Exhibit client-centeredness, plan effective I&C sessions, collaboratively identify and solve problems, gather information effectively, organize / structure sessions for thoroughness and effectiveness, share information effectively, facilitate client decision-making and plan implementation, manage professional relationships, navigate common ethical issues that arise in the context of legal I&C, respond to a broad range of clients and client needs, and reflect on I&C performances in ways that facilitate continual growth in I&C proficiency in order to facilitate better client representation and client service.
You will aim to demonstrate the abilities to:

- Establish rapport and the seeds of trust with the client
- Create a comfortable atmosphere for the client to provide information and make necessary decisions
- Establish rules and goals that facilitate proficient I&C sessions
- Mirror / reflect and respond to client needs, and
- Maintain an appropriate professional and client-centered demeanor (warm, reactive, and animated).
You will aim to demonstrate the abilities to:

- Explain professional elements (fees, confidentiality, clinic status (if applicable), etc.) without overwhelming the client with length, detail, or complexity; introduce and clarify the purpose of the meeting; and solicit key structural information from the client (e.g. time constraints, whom she represents, etc.).
You will aim to demonstrate the abilities to:

- Use roadmaps, signposts, open questions, and framing statements to orient the client and structure and guide a PPI process.
- Successfully elicit a problem overview as well as client objectives, legal and extra-legal concerns, actions taken already, and proposed solutions.
- Use appropriate information gathering techniques and begin to take probe notes.
- Clarify and verify your understanding with appropriate questions and summary.
- Appropriately motivate the client with purpose statements, active listening, non-interruptive verbal and nonverbal feedback, etc.
- Frame transitions to and from PPI and to and from each sub-topic.
Frame transition from PPI to DFG:
- Conclude PPI process
- Introduce and indicate reason for next segment (Detailed fact gathering)

Roadmap to transition from Preliminary Matters:
- Conclude prior topic
- Intro and indicate reason for next interview segment

Elicit Problem Overview (narrative):
- Frame narrative overview
- Retain focus on interview
- Elaboration & Clarification questions
- Brief summary

Elicit Client-centered Info:
- Client Objectives
- Client Concerns
- Client Actions so far
- Client-Proposed Solutions

Detailed Fact Gathering
Performance indicators

You will aim to demonstrate the abilities to:

- Orient the client and structure the interview with roadmaps, signposts, summaries, and transitions
- Use information-gathering techniques efficiently, including narratives, timelines, role playing, T-funnels, “anything else” frames, and appropriate question types
- Demonstrate client-centeredness through active listening, empathetic feedback, attempts to verify the understanding of the client’s story, and appropriate follow-up based on probe notes.
You will aim to demonstrate the abilities to:

- Continue to elicit information and explain the reasons for pursuing various lines of questioning without providing premature counsel or conclusions
- Anticipate eventual legal translation without forcing incongruent legal conclusions
- Focus the interview on the development of legally salient information and use narrow questioning techniques effectively
- Restate facts as needed for clarity, verification, or client orientation
- Know whether and how to structure the end of the session and / or arrange for a follow-up session
Performance indicators

You will aim to demonstrate the abilities to:

- Plan for and structure effective counseling sessions
- Understand the problem from the client’s perspective, including the facts and the client’s goals and concerns
- Respond to changed information or circumstances (where the counseling session is separate from the interviewing session)
- Clearly convey the legal status in a way that best facilitates client understanding and sets the stage for structured client decision-making
- Fully invite the full participation of the client.
You will aim to demonstrate the abilities to:

- Show client-centeredness in counseling and empower client decision-making
- Structure the evaluation of options, including an efficient consideration of advantages & disadvantages, immediate and downstream consequences, and congruence with client objectives and concerns
- Help the client to think critically about the selected option, including opportunity costs
- Set the stage for solution implementation, considering legal and extra-legal issues
You will aim to demonstrate the abilities to:

- Handle the attorney-client relationship ethically and in a professional manner that makes clear the processes at work and the expectations of all parties.
You will aim to demonstrate the abilities to:

- Plan for and structure effective counseling sessions
- Think down the road and establish processes that will both garner efficiencies and maintain rapport in future aspects of this client representation or in additional representations of this client