

Establishing a healthy client relationship in an online environment

by [Adele Ballantyne](#), [Marcie Shaoul](#)

[managing clients](#) [working from home](#)

Adele Ballantyne, Director of Eleda Consultancy and Marcie Shaoul Director of Rolling Stone Coaching have come together to talk about how to effectively build online relationships with clients. Both Adele and Marcie have extensive experience of working with clients online and their work depends on quickly building a trusting mutual relationship to allow forward movement for their clients. Here they share some simple, effective strategies for working from home so that you can get the best from your meetings and more importantly build easy and solid rapport with your clients in a virtual way.



The Covid19 pandemic has in just a few short weeks revolutionised how we work in this country. For some of us, working from home is commonplace but for many it is something new and unfamiliar. Working with clients who are separating is often challenging, especially when there are children involved. Now adding in the backdrop of a pandemic only increases those challenges and the prospect of working from home, might feel incredibly difficult.

The initial meeting

The first meeting with clients is always an important one and its harder to get it right when we have to meet remotely. Clients are often traumatised when they seek help in the family law space and so by asking yourself a few simple questions beforehand, you will be able to formulate an agenda for that crucial first meeting:

- Do I have a designated 'office' space to work from where I won't be interrupted?
- When using video calling technology, what can my new client see? Is it professional?
- What am I hoping to achieve from this meeting?
- How do I build trust, set boundaries, communicate clearly?
- By the end of the meeting I aim to....

Building Trust

This is the most fundamental thing that needs to happen when you are establishing a relationship with a new client. If you have been personally recommended to your client by a friend or another professional then you may have already accrued the beginning of a trusting relationship. If not, then you need to put some immediate steps in place to enable them to feel safe. And this is harder to do online. The essential elements to build trust are:

Listening

Really listening to what clients are saying is one of the best things you can do when meeting for the first time. It is easy to drift off and think about other pressing matters during meetings, but it is crucial that you remain fully focused. Conscious listening requires you to check what you have heard by asking 'open questions' or perhaps reflecting back, using the same language as your client, what you think you have heard.

We have three levels of listening. Level 1 – which is when we're in our own heads, Level 2 – when we are really focussed on what our clients are saying and Level 3 – when we tune in with everything. If connecting with a client is ever difficult it's usually because as a coach or a therapist, we have not tuned in properly. When we listen with everything we have, there is always a connection. You get so much more out of relationships when you are able to do this.

Eye contact, mirroring (mirroring is the unconscious, imitation of one person's behaviour by another) and the occasional head nod have the positive affect of showing your client that you are listening. Not talking over them, or interrupting them unnecessarily also helps demonstrate to your client that you are really hearing what they are saying. When they feel heard, they feel safe. When they feel safe, you are able to move things along.

Boundaries, consistency and reliability

Boundaries are one of the foundation stones when beginning any new relationship and are vital to building trust. They are the limits and rules we set for ourselves within relationships. People with healthy boundaries can say "no" to others when they want to, but they are comfortable being open and intimate in close relationships. Basically boundaries are "what's ok?" And "what's not ok?"

We need to be **clear** about what is and isn't allowed in the professional relationship with our clients. We must be mindful to **respect** each other's boundaries and importantly, stick to them.

Consistency is also crucial in terms of boundary setting and managing people's expectations and protecting your own space. Try to make the initial meeting the starting point for that consistency and reliability through repetition of language and behavior. So if you say you will call at a specific time, do so. Words + actions = trust

Be **reliable**. Be mindful to only say "yes" to tasks that you can comfortably achieve and are within your area of expertise. If you schedule a meeting for an hour, keep the meeting to and clearly. Clarity is more to talk about re-schedule. If you don't know something, then it's ok to say that and explore the answer together or find out from someone who does. Clients know instinctively when you're not being truthful or are holding something back. Nothing does more to destroy trust than the feeling that someone is not being entirely honest. Trust also grows from safe sharing. Be clear about what you can and can't share. Information maybe sensitive so check with your client about what is considered private or shared.

Accountability

If we get something wrong it its important to **own it, apologise** and **try to make amends**. Saying sorry and making changes to how we do things matters. Saying sorry and changing nothing, means nothing.

Have integrity and be non-judgemental

Try to develop integrity in all things not just your work and encourage it with your colleagues and clients. Integrity is; Choosing **courage** over comfort; Choosing what's **right** over what's fun or easy; Choosing to **practice** rather than **professing** your values. (Brene Brown)

No Judgement

Being non-judgmental is essential if you want your clients to 'open up' and trust you.

Always check with your clients that you have understood fully what has been said, as sometimes meaning can be 'lost in translation'. Remember you are working with emotional people and sometimes it can be heard in a different way to how you meant it.

Communication is Key

In all online conversations, communication is key and that means that the language you use is everything. When you meet your clients online they may well be distressed or have high level of emotions. The quickest and most efficient way to reach them is to speak simply and clearly. Clarity is everything, the words you choose are everything. Simple is key. Legal talk needs to be banished, speak what you mean and mean what you say and the messages will get through very quickly. Try to use 'and' instead of 'but'. Make sure that you speak neutrally so what you say cannot be interpreted in an incorrect way.

Pause. The annoying thing about working virtually is that there can be delays in hearing people. So pause before you speak to make sure your client has finished speaking and pause after your speak so they know you have finished speaking. Smile, use your eyes to show empathy, use the tone of your voice to convey warmth. Start the conversation with small talk to help people feel more relaxed. Try to find a point of connection.

Eye contact. Don't look at yourself look at your client. And better still, find where the camera is and look at that. If you're doing that, you're giving them eye contact and that is crucial to establish trust.

The Home Office

Creating the right environment has never been more important. Your client needs to know that they are 'meeting' with a competent professional who is going to help them through one of the most traumatic experiences of their life so far.

Make sure your working space and your living space are different. Professionalise your working space, nobody wants to see your washing drying behind you.

If you take your space seriously, your clients will take you seriously.

Try to create a workspace where you are comfortable and have few distractions/noise (may be difficult if you have children at home). Ensure important conversations are as confidential as possible. If you have a partner who also needs the workspace, try to negotiate a timetable so you can share. If possible try to use a room that you can leave and close the door at the end of your working day.

Make sure you're on time to your meeting, you're dressed appropriately and as you would in a face to face meeting, have meeting objectives that you stick to.

Manage your expectations, establish some ground rules, decide who will answer the door/telephone/deal with pets and children. Be fair. A 'meeting in progress' sign on the door might be useful. Try to stay focussed on work by leaving your personal phone in another room. Access personal social media during designated breaks only. Think about when you intend to have breaks or lunch and try to stick to those times.

If you have prepared as much as you can, both your workspace and your aims for the initial meeting, then you are halfway to building rapport with your client.

Conclusion

Seeing clients online is a huge part of coaching and therapy. Each of us see a large proportion of our clients over Zoom or Skype and even the phone. For therapy, it's optimal to work with clients face to face, for coaching whilst it doesn't affect the outcome, it does mean that we need to take a slightly different approach.

For some clients there will be an advantage to not be in the same physical space as a lawyer. It might feel less intimidating or daunting so clients can be more inclined to open up. You may reach a lightbulb moment more quickly than you would otherwise. Clients can feel more comfortable when they are in their home environment, it's usually a safe space for them.

The key thing to making online relationships work is to build trust as quickly as possible. We do that through eye contact (so find your camera) and through really listening, not just with our ears, but with our eyes and our instincts too. It might sounds strange to listen with instinct, but it's something we do naturally when we are sharing a physical space with someone and it works online too.

Virtual relationships can always be as rewarding and as productive and effective as physical ones. We just need to adjust and adapt to make that possible.

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