

Interviews, Guides & Summaries

Overview

The LLC formation template set includes data management tools intended to facilitate data gathering, data management and decision-making tasks. These tools include the following:

- Interview Guide
- Master Interview
- Interview Summary
- Document-Specific Interviews

This document briefly describes these interviewing aids and highlights ways in which their proper use can result in more effective client interviews and a better, more organized formation process.

Interview Guide

Interview Guides (hereafter, “guide or guides”) are customizable documents that can be used to manage data gathering in client consultations. Printed guides function as checklists and data entry forms during client consultations and, thus, can be used to facilitate data gathering and decision in those meetings.

Comprehensive guides can be generated without knowing much about the client’s situation or, when basic information is known, customized guides can be generated by entering a few key data items. A customized guide is a hard copy representation of a specific combination of master interview questions that maps to the client’s situation ([see example](#)) and, thus, is a more efficient way to track issues and record data in client consultations and is also a convenient vehicle for transferring client data and decisions online to the master interview.

An effective way to use guides is to (a) first generate a customized guide based on an initial understanding of the client’s situation, (b) review the guide’s questions and endnotes, (c) then use the guide to record data and decisions that emerge during initial client meetings and (d) finally transfer data and decisions noted on the guide to the master interview.

Master Interview

The Master Interview elicits the information needed to complete the tasks necessary form a limited liability company. Data entered in interviews can be saved in answer files and, therefore, typically does not need to be entered a

second time. Client answer files can be reloaded at any time and used to complete additional formation tasks. Consequently, it is standard practice for users to create answer files for each new matter and to routinely save interview data in those files.

As an alternative to using an interview guide, one could run the master interview on a laptop or tablet entering data and decisions while working with a client. This can be challenging, but is workable. Note that interview guides and the master interview have been designed to be used by lawyers and not by clients since the presentation of legal issues in them would be unfamiliar and likely confusing for clients.

Interview Summary

Interview Summaries (hereafter, “summary” or “summaries”), like the Interview Guide, are documents that present the questions of master interview in printed form. Summaries also include all data and decisions gathered by a master interview ([see example](#)). Summaries can be generated from the master interview even when they contain unanswered questions ([see example](#)) and, thus, provide snapshots of the data currently stored in the master interview and of missing data.

The difference between a summary and the guide is that the summary includes responses to all answered questions in the master interview while guides are not pre-populated with client data. Summaries are essentially interview guides with available data filled in. Both may be used as interviewing aids during client meetings. Data collected from clients can be penciled into these documents either during or after such meetings.

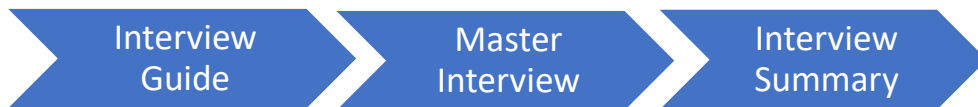
In addition to its value as an archival document, a summary is typically a more effective interviewing aid than an interview guide for subsequent client meetings as summaries, once some data has been gathered, more precisely support ongoing data gathering and decision-making efforts.

Summaries can be very useful in the supervision process because summaries organize master interview data into a readable, easily scanned and accessible format.

Interviewing Tools Summary

The scenarios below illustrate some of the ways Interview Guides, Master Interviews and Interview Summaries might be used in combination to support data gathering and data use activities.

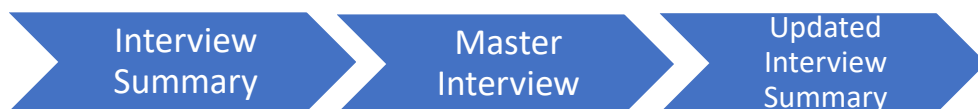
Scenario 1: The lawyer (a) uses either an interview guide in an initial client meeting (b) after the meeting transfers the notes made on the interview guide to the master interview and (c) then generates an interview summary for use in subsequent client and supervision meetings.



Scenario 2: The lawyer (a) runs a master interview on a tablet to record data and decisions in an initial client meeting and then (b) generates an interview summary for use in subsequent client and supervision meetings.



Scenario 3: The lawyer knowing a good deal about the client's situation creates a new matter then (a) runs the master interview entering what is known about the matter and generates an interview summary to use in the next client meeting, (b) after the meeting transfers meeting notes made on the interview summary back to the master interview and (c) then regenerates the interview summary for use in subsequent client and supervision meetings.



These scenarios illustrate just a few of the ways these tools can be used in various combinations in the formation process.

Document-Specific Interviews

In addition to the Master Interview, there are document-specific interviews associated with every template in the LLC set. These document-specific interviews are automatically run each time a document is assembled and use data from the master interview.

Document-specific interviews can be used to assemble documents without first gathering the broader range of data required by the master interview. While skipping the master interview is more efficient in some situations, normally users who are tasked with forming an LLC will find the master interview to be a more efficient and comprehensive way to gather the data needed to produce the documents required to form an LLC.