



## Activity Statement: Record of Engagement

The record of engagement is to be completed after each engagement between the SRM and the client. This is regardless of the method of interaction, be it face to face, verbal, or by any written media.

### Purpose of engagement:

The SRM is to clearly articulate the reason or intent of your engagement with the client. You must include the detail of your engagement plan. (See engagement plan activity statement)

### Discussion during engagement:

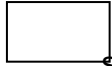
It is critical to understand that a professional engagement is **NOT** a social interaction, you are not just a passive participant in this process. **You** enter this with intent. **You** have an agenda that you are striving to achieve. **You** are responsible for the outcome of this engagement.

The manner in which you conduct yourself and the engagement will have a significant impact on the quality of the engagement, and the success of the engagement.

Be aware of your body language, ensure that it is engaging and focused without being intrusive. Observe how the client is reacting to you and modify your body language and personal space management accordingly.

Be an active listener. Active listening has three main elements.

1. Attention. Active listening is an intentional act. You must focus your attention on what the person is saying, not your reaction to what they are saying. You are there to gain information, not to provide solutions. It is essential that you exercise discipline and listen without formulating a response to what is being said.
2. Attitude. Active listening requires you to have the correct attitude. You must go into the discussion with a genuine curiosity about the client and the questions you are going to ask and the story they are going to relate to you. Have the respect for the person and maintain real curiosity. This will help you listen and will also help generate further questions. When you ask further relevant questions you demonstrate you are listening.
3. Adjustment. It is unlikely that all conversations will go the way you have anticipated. You may enter the room with the intent to be quiet and allow the person to tell their story uninterrupted, only to discover that you are going to need to provide significant prompting to support the conversation. If this is



successful you may then need to adjust and return to a more passive role. This is an example of adjusting your approach during an engagement.

Utilise open ended questions. Opened questions do not encourage a yes/no, or a static response. They invite the person to expand and discussion the topic of the question. For example, rather than asking, “do you have family back in Pakistan?” You might say, “I’m interested to know more about your family, could you tell me about them?”

Before beginning the engagement ask for permission to take notes. “Do you mind if I take a few notes from time to time?” Do not spend all of the time taking notes just from time to time as a reminder of the discussion. If there is something particularly significant, ask the client to stop speaking for a moment document what you need and then recommence.

Refer to the engagement plan to keep yourself on track, but if the client leads in an unexpected direction **ADJUST** and follow.

### **Actions and Ownership:**

Document all planned activities that have emerged during the conversation. Identify who is responsible for what actions. Please note there will be some actions that the client will be responsible for. This is a positive event, it demonstrates partnership, and independence by the client. Our aim is to have the client lead in most if not all decisions in regard to their DSP.

Once the actions are identified assign a review date for each action.

Finalise the engagement by booking the next engagement. Ensure that the next engagement coincides with the review dates for actions and ensure that you have a meaningful update to bring to the next engagement or defer it. Book the appropriate interpreter for the next engagement. Enter the details into your outlook calendar and send a message to the client, set a reminder the day before to send a message to the client.

## **UPDATE THE DSP!!!**