

Tip sheet

Tips for telephone consultations

Setup

- Treat calls as medical appointments (time, place, distractions, comfortable environment, privacy)
- Prompt client to have materials ready (pen & paper, glasses, program resources, previous notes etc.)
- Remind client about previous consultation and outcomes

Communication

- Tone of voice, silences, distractions, checking
- Prompt to write things down (if client is able to)
- Set up prompts, memory cues etc. while on phone
- Outline expectations for the next call or contact

It is important to create a positive telephone working environment for your clients because this will:

- Assist with communicating your role and clinical approach to clients.
- Reduce your clients' feelings of anxiety and help them to feel comfortable.
- Help to build the relationship between you and your clients and encourage open communication so that you are better able to engage them in dialogue about change.
- Reduce the risk of client distraction and disengagement when conducting telephone interviews.

What to do:

1. Whenever possible, book firm appointment times with clients.

2. Encourage clients to treat your appointment like a face-to-face clinical consultation. Use the word 'consultation', rather than 'catch up' or 'chat' when referring to review consultations. Ensure that they know you will be blocking out their appointment time in your diary, just as if they were seeing you in person.
3. Encourage your client to create a quiet time and space for your consultation, where they can speak without interruption and without fear that someone might overhear them discussing personal issues.
4. Use good quality head phones with a built-in microphone in order to keep your hands free and to keep the call private at your end of the phone line.
5. Prompt clients to have resources and materials ready at the next consultation (e.g., a pen and paper, program materials, previous notes, eye glasses and anything else that they might need).
6. Send out printed materials or resources in advance so that you can refer to these during your first consultation.
7. Whenever you call clients, remind them who you are, what organisation you are from and that you previously booked this time as an appointment to speak with them for a certain length of time. Check that it is still a good time for them to speak with you without distraction. If not, reschedule the appointment to a more convenient time.
8. From early on in your consultation, encourage your clients to write down anything that they think might benefit them (e.g., general notes, lists of ideas, their goals and action plans, future appointment times). Prompt them to record information at relevant times during the consultation just as you would in a face-to-face situation.

9. Ensure that all resources and tools you might require are within easy reach so that you can avoid disruption to the conversation flow when you need to access them. Place the Guide within reach for ready reference.
10. If possible, provide clients with a reminder text or call the day before your appointment.

How to do it: sample phrasing

- *Hello [client name], this is [your name] from [your organisation]. When we last spoke four weeks ago we booked a 30-minute appointment for this time, is that still going to work for you? [If not] When would you like to reschedule to?*
- *I will be sending you some information and worksheets in the mail to help us to decide what you would like to work on and exactly how you might do that. You should receive that pack next week. Feel free to read through the materials in the pack before we speak. Please make sure that you have them with you during our telephone appointment, along with a pen and paper in case you want to write down some notes during our conversation.*
- *Before we start, can I just confirm that you have your program booklet, worksheets and a pen and paper handy? [If not] I am happy to hang on here for a minute while you get them. [Or] Would you like me to call back in five minutes while you get your things together?*
- *[Client makes a good contribution] That's a great idea. Would it be worth writing that down to reflect on later?*
- *You are coming up with some good ideas. Would it help to write yourself a list of those ideas so that when you are thinking about what else you could do later on, you have a ready-made list of options? If your first plan doesn't work out as expected, or you would like a bit of a change, you could use these ideas as back-up options.*

- *Just before we finish, I would like to confirm that the appointment we have booked for [time and date] will take about 30 minutes. This appointment is just like a regular health consultation. I have blocked out that time in my schedule/diary to speak with you. If for any reason you are unable to make the appointment, please contact me as soon as possible so that we can reschedule, and I can give that appointment time to someone else. Is that okay with you?*
- *When we speak next, it is important that you be able to participate in the call without interruption and be able to speak freely without being worried about people overhearing what you are saying. Is that going to be possible?*

Information taken from Gale (2012)