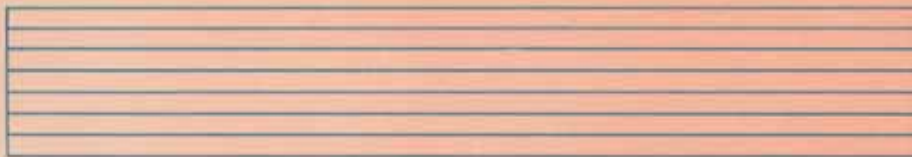


The Research  
& Training  
Center on  
Independent  
Living

# first impressions



Maintaining Courteous Treatment of Human Service Clients



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**Abstract:** Many citizens with disabilities and their families deal with human service agencies on a frequent basis. Courteous treatment by receptionists and staff helps establish a good first impression. Consumers know that they are valued and that they can expect positive, helpful contacts with agency personnel.

Courteous treatment conveys a sense of worth to persons who are disadvantaged or clients who are disabled. Sometimes, though, people with disabilities or low-income or minority status find themselves ignored or insulted by agency personnel. When consumers with disabilities are treated discourteously, they may attribute it to the fact that they are disabled. They are very aware that they may look or sound different, and a discourtesy may make them feel devalued and create serious communication barriers. Discourteous treatment creates negative first impressions and makes effective service impossible.

A good first impression starts with a courteous greeting that includes an initial greeting, offer of help, request of client's name, and offer of a seat. Service providers should describe their roles, ask client to provide needed information, state a rationale for requesting information, offer to help the client, and provide help to client if requested. When service providers are busy, they should indicate their availability or make a referral.

Other courtesies are using active listening, maintaining eye contact, offering verbal encouragements, and using open-ended questions as well as close-ended questions.

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## **PART I: INTRODUCTION**

### **CHAPTER 1: CREATING A GOOD FIRST IMPRESSION**

Life is not so short but that there is always time enough for courtesy.  
(From *Letters and Social Aims*, 1875)

Many citizens with disabilities and their families deal with human service agencies on a frequent basis. Courteous treatment by receptionists and staff helps establish a good FIRST IMPRESSION. Consumers know that they are valued and that they can expect positive, helpful contacts with agency personnel.

Staying "close to the customer" through courteous treatment is characteristic of excellent organizations in the private sector (Peters & Waterman, 1982) and a goal of public sector agencies that attempt to be accessible to their consumers. The importance of courteous treatment is underscored by Weicker's (1984) recommendation that service providers convey a sense of worth to persons who are disadvantaged or clients who are disabled and consult them on all decisions that affect them. This commitment is shared by most staff of public sector agencies who recognize that persons with disabilities are due the same respect afforded others (Declaration of Human Rights, 1981).

Sometimes, though, people with disabilities or low-income or minority status find themselves ignored or insulted by agency personnel. When consumers with disabilities are treated discourteously, they may attribute it to the fact that they are disabled. They are very aware that they may look or sound different, and a discourtesy may make them feel devalued and create serious communication barriers. Discourteous treatment creates negative first impressions and makes effective service impossible.

As exemplified by many independent living and vocational rehabilitation agencies, courteous treatment is illustrated by such actions as addressing clients by title and name or apologizing for interruptions in service. Such treatment is important, because it communicates a sense of worth to an organization's consumers, thus reinforcing their initial approach to service providers. Hospitality by receptionists and staff of human service agencies helps convey that having a disability need not mean second-class, unequal, or undignified treatment.

Surveys and structured interviews (Johnson & Fawcett, 1987) suggest that persons with disabilities may be particularly at risk to nonresponsive and undignified treatment, since they often attribute their being ignored or their being the target of offensive statements to their physical appearance. Thus, courteous treatment may be a critical objective in efforts to achieve equitable conditions and opportunities for persons with disabilities. Such efforts require methods for increasing and providing feedback on courteous treatment.

*First Impressions* is designed to help human service agency workers achieve a high level of positive communication. Most agency personnel do their very best to treat clients courteously, whether they are receptionists, intake interviewers, vocational counselors, welfare counselors, or nonprofessional service workers. They use empathy, sincerity, and humor to help build a solid foundation for providing courteous service. However, we can all still benefit from enhancing our personal style.

The methods described in *First Impressions* have been carefully tested and evaluated to help staff and administrators of vocational rehabilitation, independent living, and other human service agencies to deal with clients in the most effective and courteous way. Skills such as active listening, polite question asking, and giving nonverbal and verbal encouragement are illustrated. These skills can make a big difference in establishing or improving relationships with clients. By emphasizing

courtesy and dignity, a service provider communicates that he or she values the client. This, in turn, creates a situation that is much more likely to produce positive results for all concerned. First impressions do matter!

### **References**

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## **CHAPTER 2: THE TRAINING METHOD AND ITS EVALUATION**

Although early research in the human service agency area has stressed how important agency workers are, there are few programs that actually prepare agency workers for their roles. Those programs that do exist focus on helping workers with administrative procedures and explaining how their actual or potential role in the agency relates to other agency workers. This manual has a completely different focus.

This manual teaches human service agency workers how to create a positive first impression that can help in their work with clients. It is designed to improve consumer and worker interaction in such skills as beginning and closing appointments, listening, handling special situations, and asking questions courteously.

### **How Was the Method Developed?**

Many of the communication skills that you will be learning were identified through a review of the literature and by examining different training programs. Additional skills were identified by numerous interviews with clients and human service providers. Each skill has been broken down into many small parts so they can be easily learned.

### **How Do the Training Lessons Work?**

The training lessons provide clear descriptions of each skill to be taught. Detailed instructions are followed by study guides that allow agency receptionists and service providers to review each skill and test their knowledge. Role-playing exercises are also included to encourage service providers to practice the skills. In short, the training lessons offer instructions, examples, rationales, study guides, practice, and feedback.

### **Is the Training Effective?**

The effectiveness of the *First Impressions* training materials was evaluated experimentally with receptionists in three different service agencies frequented by people with disabilities. These agencies included an independent living center (ILC), a poverty services agency, and a computer skills training agency for persons with disabilities. The results showed dramatic increases in the use of courtesy skills in all three agencies. Since improvements occurred only after training, results suggest that the training was responsible for those improvements. Consumer satisfaction with services in all three agencies also increased, as courteous treatment of consumers increased. Staff in each agency rated the training as useful and important, and all agreed that they would recommend the training for other service agencies.

## **CHAPTER 3: INTRODUCTION**

Service agency workers possess certain qualities that help them in their jobs. Consumers often describe these workers as “interested,” “friendly,” and “courteous.” These are skills that can be taught, or enhanced, if a worker is open and receptive.

### **How Can the Training Be Used?**

*First Impressions* can be used by consumers, staff, and administrators of vocational rehabilitation, independent living, and other human service agencies. Consumer organizations could encourage adoption of the training program by the various service agencies they frequent. In addition, consumers could use the training materials to evaluate courteous service and provide positive and corrective feedback to service providers on the courteous actions they do or do not demonstrate.

Service providers could use the training materials as guidelines for the type of treatment they provide to their consumers. Such materials can help staff to achieve their performance goals of excellence in service provision.

Administrators in human service organizations could use the materials to train staff and to give feedback on courteous service provision. For example, administrators could use the courtesy checklist to praise staff who are observed to treat consumers courteously and provide booster training for those who fail to do so. Thus, the *First Impressions* training program can be used by consumers, staff, and administrators of human service agencies to monitor and enhance the courtesy shown to consumers.

### **What Can You Expect From This Training?**

Skilled service agency workers are involved in answering clients' questions, gathering needed information and helping clients with their problems. They are expected to know how to do their job well. In upcoming lessons, you will learn how to fine tune your skills in asking questions in a courteous way, demonstrating interest in the client, and dealing appropriately with persons with physical, psychiatric, or developmental disabilities. Overall, you will learn how to deal with all your clients in the most courteous and, therefore, effective way.

### **What Will Be Expected From You?**

The training lessons are designed to teach one skill at a time. Each lesson explains why, when, and how to use each skill. In addition to studying this material, you will need to practice or role play each of the skills you learn with another person. The old saying "practice makes perfect" holds true here. The more you practice, the more you will sharpen your skills.

It is also most efficient to master one skill before going on to the next. Since each skill is important, each one should be learned separately. Feedback will be given to you about each skill as you learn and perfect it. There is no need to hurry through the lessons. So, take your time, and practice each skill until you feel confident.

### **How Much Time Will Be Required?**

Since each of us learns at different rates, learning times will vary. The important thing is to study and practice each lesson until you feel you know it well.

Also, each learner is going to need different lengths of practice time to master different skills. Some skills will be easier than others. Again, you need to practice the skills as often as you can with other workers and friends.

## **Things to Talk Over With the Instructor**

An instructor will be available to help you learn the skills. If questions arise during the lessons, talk with the instructor. However, most of the information you will need is in each chapter. So, let's get started with learning how to provide an even more favorable first impression with consumers.

## **PART II: THE TRAINING LESSONS**

### **CHAPTER 4: THE COURTEOUS SERVICE PROVIDER IN ACTION**

Read the following dialogue between a service provider and a client. The skills used in each exchange appear to the right of the dialogue. These are the skills we'll be focusing on in future lessons.

Worker: Good morning, may I help you?

Initial greeting. Offer assistance.

Client: Yeah, I'm here to find out if I can get some assistance in getting transportation to work.

Worker: O.K. Can I have your name please?

Request client's name.

Client: Violet Wilson.

Worker: Thank you, Ms. Wilson. Won't you please come with me?

Thank client. Address client by name. Ask client to come with you.

Client: O.K.

Worker: It's part of my job to get some information from you first.

Specify role.

Client: That's fine with me.

Worker: We'll take a few minutes to complete this information card for our records. We need to see if you are eligible for transportation assistance according to our agency's guidelines.

Specify what you are doing.  
Specify why you are doing it.

Client: Uh-huh.

Worker: May I have your address?

Ask relevant questions.

Client: 47 Main, Apt. 36.

Worker: Do you have a phone number where you can be reached?

Client: No.

Worker: How many people live in your home?

Client: Myself and three children under 10 years old.

Worker: What is your monthly income?

Client: \$235.00, I think. .Yes, it is \$235.89.

Worker: Are you employed?

Client: Well, I guess you could say so. I'm a part-time cook at the Elks Lodge in town. I work only 3 hours a day.

Worker: Okay. Have you ever received transportation assistance from us before?

Client: No, this is the first time.

Worker: I see. Are you receiving similar assistance from anywhere else?

Client: Nope.

Worker: [Phone rings] Excuse me a second.

Excuse the interruption.

Client: Sure.

Worker: [Returns from the call] Well, Ms. Wilson, our agency is set up to help people in just your situation. I think we can fix you up with some transportation vouchers this Tuesday at 9 a.m. Please come again then. Do you have any questions?

Request client questions.

Client: Great. Yes, I do have a question. I saw when I came in that you had some sort of newsletter on the table. Can I have one?

Worker: Sure. Please take one.

Answer client question.

Client: Thanks.

Worker: Is there anything else I can help you with?

Request other questions.

Client: No, not now.

Worker: Well, let me know if something comes up. We'll see you Tuesday at 9 a.m.

Offer future assistance.

Client: Yeah... thanks a lot.

Worker: Have a nice day, Ms. Wilson.

Final parting statement.

Client: Same to you.

## CHAPTER 5: LISTENING ACTIVELY

### Active Listening

Good listening skills are critical for positive communication with clients. Listening helps demonstrate that you are interested in what the client is saying. Good listening helps build a solid foundation for future positive conversations with clients.

### When to Use

It is important to listen actively in the following situations:

- \* When you want to encourage the client to keep talking
- \* When you want to show the client that you are interested in what he/she is saying

Active listening involves both doing and saying. First, let's look at what to do during active listening.

### What to Do During Active Listening

Active listening involves the following four nonverbal activities:

- 1) Assume an active listening posture.
- 2) Maintain eye contact.
- 3) Make active listening facial expressions.
- 4) Make nonverbal encouragements.

#### 1) Assume an Active Listening Posture

General posture: Your body should face the client. Lean slightly forward, don't slouch, and sit up straight.

Head: Hold your head up straight.

Arms and hands: Rest your arms on your chair, desktop, or lap. Put your hands on your lap or on the desk. Try to avoid crossing your arms, putting your hands in front of your face, or playing with your hair, jewelry, etc.

Legs and Feet: Keep your feet on the floor. Try to avoid nervous leg movements (e.g., bouncing your legs).

Assuming an active listening posture expresses interest in what the client is saying. It also shows the client you think he/she is worth listening to. This increases the chances that the client will trust you, relax, and talk freely to you.

#### 2) Maintain Eye Contact

Whenever you or the client is speaking, look directly into the client's eyes, but try not to stare at the client. Eye contact indicates that you are really listening and want to help.

#### 3) Make Active Listening Facial Expressions

Use natural facial expressions to show you are paying attention. You might smile when the discussion is happy or positive or look concerned when the discussion is more serious.

Facial expressions communicate warmth, attentiveness, and friendliness. They encourage the client to share appropriate information.



#### **4) Make Nonverbal Encouragements**

You should also nod your head or smile while maintaining eye contact with the client. For example, when a client is talking, look at the client's face and eyes periodically. Your face should be serious and your mouth closed. Occasionally, nod your head to let the client know you are following what is being said.

Nonverbal encouragements help to acknowledge an interest in the client and encourage the client to keep talking.

##### **What to Say During Active Listening**

You should acknowledge the consumer's comments by making a brief statement such as: "Uh-huh," "Oh," "I see," "Mm," "Yes," "I understand"

Verbal encouragements also show the client that you are listening and want to hear everything that the client has to say.

#### **Use a Pleasant Voice Quality**

It is important to talk in a pleasant, interested tone of voice. Try not to speak too loudly or too softly or repeat phrases, such as "you know" or "like."

Please read the following example. Notice how the worker encourages the consumer to continue talking:

Client: I'm having some legal problems.

Worker: Oh?

Client: It's tough to decide where to start.

Worker: I see.

Client : It started with my boyfriend moving in with me and then the welfare agency found out.

Worker: Uh-huh.

Client: They are threatening to decrease my checks if he stays with me.

### **STUDY GUIDE**

#### **Review Questions**

Please answer all of the following questions. If you have any difficulty, go back and reread that section, and try it again.

- 1) Why is active listening important?
- 2) What are the four activities involved in the doing component of active listening? What does each involve?
- 3) What is the verbal activity involved in the saying component of active listening? What does it involve?

#### **Skills Practice**

Here is an example and some exercises that you and a colleague or partner can use to practice your active listening skills.

When you role-play, you are trying to create a situation in which the worker helps the client in some way. Both people should do their best in acting out their respective roles.

#### **Example**

Client: [partner] My little boy has had the stomach flu for the past few days, but I can't afford to buy the prescription the doctor recommended.

Worker: [you] [Offer information about free prescriptions at your agency. Use good posture, eye contact, facial expression, and make verbal and nonverbal encouragements.]

Have the partner use the Skills Checklist to check the things that you did well and the things that you need to work on.

Once you have completed the Skills Checklist, the partner should let the student know what he/she did well. ["Your facial expressions and eye contact were great."]

Next, your partner should describe the things that need work. ["Let's practice your posture once more, O.K.?"]

Practice until you are able to perform all the skills perfectly. This usually involves at least two practice sessions for each exercise.

### **Exercise 1**

A client is not satisfied with his or her present job and wants a new job. The client has come to the local job-finding agency to get some help. You work at the agency.

### **Exercise 2**

A patient needs a thorough physical and has just arrived at the doctor's office. You, the receptionist, ask the patient to complete the information form, and you also have some questions for the patient.

### **Exercise 3**

A client is explaining to you (the receptionist) that he/she is running out of food at home and needs some help. The client feels your agency (the Emergency Food Shelter) can help. You respond.

## **SKILLS CHECKLIST**

Skill	Practice Session Number			
	1	2	3	4

Use active listening.

Maintain eye contact.

Make facial expressions.

Make nonverbal encouragements.

Make verbal encouragements.

X = Well done

O = Needs work

## **CHAPTER 6: ASKING QUESTIONS**

Service providers must ask questions to get necessary information. Asking questions speeds up the information-gathering process and helps you help the consumer. Questions should be asked courteously without intimidating the client. There are two types of questions: open-ended and close-ended. A description of each follows.

Open-ended questions are investigative. They help clients think about their feelings and thoughts and are usually answered with more than a few words. The service provider cannot predict what answer the client will give.

Close-ended questions usually request factual information and can be answered in one or two words. Close-ended questions are appropriate when gathering specific information about the client, i.e., marital status, number of children, address, age, and occupation. Answers to close-ended questions can also help the service provider make sure he/she has understood what a client has said. They can be a check on accuracy.

## Open-Ended Questions

Open-ended questions are short and direct. One question is asked at a time.

### When to Use

Use open-ended questions in the following situations:

- \* When beginning an appointment. "How can I help you?"
- \* When asking for examples of specific behavior. "Can you give me an example of when that happens?"
- \* The client is discussing several different topics, and the service provider wants to get back to the main issue. "You said your first concern was about free medical examinations. How have you been getting medical care lately?"
- \* Asking the client about each alternative. "What are your thoughts on this?"

The following are examples of good and bad open-ended questions. Notice that each good question is short and direct.

### Example 1

Client: I can't get the childcare I need.

Worker: Is it just not available? Or too expensive?

Rating and Reason: This is a good question, right to the point.

### Example 2

Client: There are no jobs anywhere.

Worker: What do you mean, anywhere? I mean I know the job situation is pretty bad, but I'm not sure if you mean no jobs in this town or in this state. What do you mean?

Rating and Reason: This is a bad question, because it is long, and the worker may have already answered the question for the client.

It is recommended that you follow these steps for good communication with a client:

- 1) Make an open-ended question.
- 2) Listen actively.
- 3) Use verbal or nonverbal encouragements when the client answers.

### 1) Make an Open-Ended Question

When asking questions, use an appropriate initial phrase followed by the question you want to ask. Some examples of appropriate initial phrases include:

"How...?"

"What...?"

"How do you feel about...?"

"Could you tell me more about...?"

The following are inappropriate initial phrases:

"When...?"

"Do you...?"

"Why...?"

"Who...?"

"Where...?"

It is important to notice that appropriate initial phrases require more than a one word answer. In contrast, inappropriate initial phrases can be answered with a one or two- word answer, such as "yes" or "no."

## **2) Listen Actively**

When using active listening, you should look directly at the client, lean forward slightly, and look attentive. Active listening lets the client know that you are interested in what he/she is saying and that you are sincere in what you are asking.

## **3) Use Verbal or Nonverbal Encouragements When the Client Answers**

You should encourage the client verbally or nonverbally while he/she is speaking by smiling, nodding your head, or making an encouraging comment, such as "uh-huh" or "I see." (Please see Chapter 5, Listening Actively, for more specific descriptions of verbal and nonverbal encouragement.) Examples of verbal and nonverbal encouragements follow:

### **Example 1**

Client: I'm really not satisfied with my living arrangements.

Worker: What options do you see?

Client: I could move in with my folks.

Worker: [With facial expression showing interest] Hmm.

Client: That might be a temporary answer.

Worker: [Nods head twice]

Client: I'll call my dad next...

### **Example 2**

Client: I really don't feel that I can come in next Wednesday.

Worker: Why can't you make it?

Client: Well, I've got a job interview that morning.

Worker: I see.

Client: And it is hard to say how long that will last.

Worker: Uh-huh.

The following are client statements. Read each one, and then make an open-ended question to find out more about the situation.

### **Exercise 1**

Client: This has really been a wild month. I'm glad you were able to see me today.

Worker: \_\_\_\_\_

### **Exercise 2**

Client: Basically, I need medical care.

Worker: \_\_\_\_\_

### **Exercise 3**

Client: What would you like me to say about my employment situation?

Worker: \_\_\_\_\_

## **Summary of Open-Ended Questioning**

In summary, follow these steps for good communication with clients:

- 1) Make an open-ended question.
- 2) Listen actively.

- 3) Use verbal or nonverbal encouragements when the client answers a question.

### **Close-Ended Questions**

You should ask close-ended questions when you want to make sure you understand what a client has said. It is also appropriate to ask close-ended questions when you are seeking factual information.

### **When to Use**

Use close-ended questions in the following situations:

- \* When gathering specific information.

Client: I would like to register for job training, but I don't know where to go.

Worker: Where do you live?

Client: On Adams St.

- \* When you need feedback on your understanding of what the client has said. For example:

Client: I tried to get a job last month so that I could get off welfare, but I knew that would probably be hopeless, so I just decided to continue looking.

Worker: Let me see if I understand you. You looked for a job and found it difficult to find one, so you are going to continue looking?

Client: That's right. I guess I'll just have to keep looking.

- \* When scheduling the next appointment.

Worker: When next week would you like to come in?

Client: Tuesday would be fine.

Examples of close-ended questions and verbal and nonverbal encouragements follow:

### **Example 1**

Client: I appreciate everything you've done.

Worker: Would you like to schedule another appointment?

Client: I think all my questions have been answered.

Worker: [Nods head and smiles] I'm glad to hear that.

### **Example 2**

Client: So, that is why I'm here.

Worker: Are you saying that transportation to the store is your biggest concern right now?

Client: Yes.

Worker: [Nods head] I see.

The following three activities are recommended when asking a client for further information.

- 1) Make an open-ended question.
- 2) Listen actively.
- 3) Use verbal or nonverbal encouragements when client answers.

### **1) Make a Close-Ended Question**

Ask a question using an appropriate initial phrase and then pause. Some examples of initial phrases include "When...?" "Do you mean...?", or "Is it...?"

### **2) Listen Actively** (As described above)

### **3) Use Verbal or Nonverbal Encouragements When the Client Answers** (as previously described)

Please read the following examples of clients' statements, and ask a close-ended question in order to get more information from the client.

**Exercise 1**

Client: I'm going to need some financial assistance soon.

Worker: \_\_\_\_\_

**Exercise 2**

Client: With my part-time janitorial job at the Y.M.C.A., I'm going to have transportation problems getting across town.

Worker: \_\_\_\_\_

**Exercise 3**

Client: My daughter is having problems at school. I wish there was free tutoring available for students like her.

Worker: \_\_\_\_\_

**Summary of Good Question Asking**

In summary, the steps involved in good communication include:

- 1) Make an open-ended or close-ended question, as appropriate.
- 2) Listen actively.
- 3) Use verbal or nonverbal encouragements when client answers a question.

**Putting It All Together**

To help you put it all together, the following exercises are included.

Please read each of the examples of client statements, and ask either an open-ended question or a close-ended question after each statement. Consider why you chose either an open-ended or close-ended question.

**Example**

Client: I've tried every way I know how to get a job. I'm not sure what else to do.

Worker: "What exactly have you tried?"

**Exercise 1**

Client: I'm having a tough time with medical expenses. I think I'd better get some type of assistance.

Worker: \_\_\_\_\_

**Exercise 2**

Client: I've had lots of experience as a vocational volunteer. I would like to volunteer for your agency, if you need someone to help.

Worker: \_\_\_\_\_

**Exercise 3**

Client: This is my first time at the welfare office. I'm not really sure where to start.

Worker: \_\_\_\_\_

**STUDY GUIDE****Review Questions**

Do your best to answer the following questions. If you have any difficulty, reread the section, and try the question again.

- 1) What is the difference between an open-ended and a close-ended question?
- 2) When is it best to ask an open-ended question?
- 3) When is it best to ask a close-ended question?
- 4) Please describe briefly the steps involved in asking an open-ended question. Give an example of each activity.

- 5) Please describe briefly the steps involved in asking a close-ended question. Give an example of each activity.

**Skills Practice**

The following are some exercises to help you practice asking appropriate questions. Practice with a colleague, and feel free to make up your own examples, too. Here is an example of how you and a colleague or partner can role-play asking questions:

**Example**

Client: [partner] It is difficult just to make sure that my kids have enough clothes.

Worker: [you] [Ask an open-ended question]

Client: Clothes cost so much today. I wish I knew of some alternative.

Worker: [Use nonverbal encouragement and ask a question.]

**Exercise 1**

You just sat down with a consumer and are going to begin the intake interview. This client is interested in becoming a peer counselor for your service center.

**Exercise 2**

A new client has requested more information about job training at your agency. You need to fill out an enrollment card so this person can attend the next workshop.

**Exercise 3**

Your agency provides referral services to needy clients. A client has just arrived at your agency and needs health insurance information from you.

**SKILLS CHECKLIST**

Skill	Practice Session Number			
	1	2	3	4
Use active listening.				
Maintain eye contact.				
Make facial expressions.				
Make nonverbal encouragements.				
Make verbal encouragements.				
Use open-ended questions.				
Use close-ended questions.				

X = Well done

O = Needs work

**CHAPTER 7: THE INITIAL CONTACT WITH THE CLIENT**

How you open a conversation with a client sets the tone for the entire appointment. The way you treat the client creates a positive or negative situation. Effective service providers help their clients to feel comfortable by communicating a helpful and friendly attitude the moment the contact begins. This helps clients feel good about themselves. Clients with a positive attitude tend to be more satisfied with the agency.

**When to Use Initial Contact Skills**

You should use initial contact skills in the following situations:

- \* To notice the arrival of a client at the agency.
- \* To get the attention of a client.
- \* In response to a client's greeting.

\* When a co-worker directs a client to you for assistance.

An example of beginning an appointment after a client has arrived at the agency follows:

Worker: Good morning, may I help you?

Client: Yes, I was interested in getting some legal assistance.

Worker: May I have your name please?

Client: Ed Jones.

Worker: Thank you, Mr. Jones. Won't you please have a seat over there, and our legal assistance person will be right with you.

An example of how to follow a client's opening comment is shown here:

Client: Hello, I'm Cora Wilson.

Worker: Good afternoon Ms. Wilson, is there something I can do for you?

Client: I need some emergency food.

Worker: Won't you please wait in our lounge area, and I'll let the emergency food person know you are here.

There are five major activities involved in beginning an interaction.

- 1) Make an initial greeting.
- 2) Ask if help is needed.
- 3) Request the client's name.
- 4) Thank client.
- 5) Ask client to have a seat.

### **1) Make an Initial Greeting**

It is best to start the conversation with a greeting. You should also smile and look at the client.

"Good morning." (afternoon/evening)

"Hello."

"Hi."

Initial greeting statements help demonstrate friendliness toward the client and help get the appointment "off on the right foot."

### **2) Ask if Help Is Needed**

While offering to help, you should also make eye contact and smile at the client. It is helpful to use a full sentence to offer help and to do this immediately after making your initial greeting. If you already know the client's name, use it when asking if help is needed.

"Jim, how may I help you?"

"Is there something I can do for you?"

Asking a client if he/she needs help keeps the appointment moving along. It also demonstrates concern and interest in the client.

### **3) Request the Client's Name (if not known)**

When asking for a client's name, maintain eye contact and smile. Also, remember to follow your request for the client's name with the word "please."

"May I have your name, please?"

"What is your name, please?"



Requesting the client's name will help you throughout the rest of the appointment. Using a client's name (either first or last) indicates friendliness and puts the client more at ease. Using the word "please" also helps to create a friendly and polite atmosphere.

Addressing the client by name, if already known, helps stimulate a friendly and more personal environment for the client. It also gives the client a feeling of familiarity with the agency and the service provider(s).

#### **4) (If the client must wait) Ask Client to Have a Seat**

After asking the client's name, ask the client to have a seat. This must be done when the client must wait for 2 or more minutes for assistance. With your open hand, and while looking at the client, gesture toward the chair or couch where you would like the client to sit, and ask the client to have a seat. If you already know the client's name, use it when asking the client to have a seat.

NOTE: If the client is in a wheelchair, direct the client to an area in the waiting area where the chair will fit comfortably.

"Mrs. Walton, won't you have a seat over there." [gesture]

"Please have a seat at the couch to your right." [gesture]

[wheelchair] "Won't you wait in our lounge?"

By asking the client to have a seat, you are helping the person to feel comfortable while at the agency. To help you put the entire process of beginning an appointment together, the following exercise has been included. Read the dialogue between the client and service provider, and use the skills of beginning an appointment to fill in the blanks.

#### **Exercise 1**

Worker: \_\_\_\_\_

Client: Yes, I would like to find out about the free prescriptions your agency provides.

Worker: \_\_\_\_\_

Client: It is Pete Simpson.

Worker: \_\_\_\_\_

Client: Thank you.

#### **Summary**

In summary, the steps in beginning an interaction with a client involve:

- 1) Make an initial greeting.
- 2) Ask if help is needed.
- 3) Request the client's name.
- 4) Ask client to have a seat.

HINT: If you already know the client's name (first or last), address the client by his/her name, and omit step 3.

### **STUDY GUIDE**

#### **Review Questions**

Please be certain that you can answer all the questions below. If you find that you have difficulty with a question, reread the appropriate section in the chapter, and try again. A clear understanding of this information is both helpful and necessary for the practice session.

- 1) When is it important to begin an appointment with a client?
- 2) Five activities are suggested for beginning an appointment with a client.

\* Please list all five activities.

\* What is involved in each activity?

3) What is so important about beginning an appointment appropriately?

### **Practice Session**

Following is an example and several exercises that will allow you to practice the skills involved in beginning an appointment. Please feel free to create your own situations, too. Here is an example of how a partner or colleague could role play the part of a client to give you practice in beginning the appointment.

### **Example**

Client: [Walk into agency and up to reception desk.]

Worker: [Make an initial greeting statement, and ask if help is needed.]

Client: Well, lots of my friends told me to come down here and get clothes...you know, like shoes and things.

Worker: [Request client's name.]

Client: Ron Jackson.

Worker: [Thank client for providing name and ask client to have a seat.]

Client: Hey, thanks.

### **Exercise 1**

You are a client who is interested in signing up for government surplus cheese and butter to be given out at a local Poverty Service Center. You approach the receptionist (who is practicing the skills) for help.

### **Exercise 2**

Your next door neighbor recently told you about a Volunteer Service Agency and the various services it provides. You have also become aware that they need volunteers and you are willing to offer your services. A volunteer information person is sitting at a large table as you walk into the agency.

### **Exercise 3**

You are a client who has been coming to a local rehabilitation center for 5 years. You arrive at the center this morning ready to make a donation toward the emergency food fund, and as you come into the center, you see the receptionist filing papers at her desk.

## **SKILLS CHECKLIST**

Skill	Practice Session Number			
	1	2	3	4

Use active listening.

Ask if help is needed.

Request client's name.

Ask client to have a seat.

Maintain eye contact.

Make facial expressions.

Make nonverbal encouragements.

Make verbal encouragements.

Use open-ended questions.

Use close-ended questions.

X = Well done

O = Needs work

## **CHAPTER 8: GATHERING INFORMATION/FILLING OUT FORMS**

Gathering necessary information involves asking clients questions and having them fill out forms. To get specific information about what a client needs or wants from an agency is an important part of a service provider's job. It allows the service provider to do a thorough job of providing that service directly or referring the client to another appropriate helper. Good helpers are careful to gather complete information and to make sure that clients understand why the information is important.

### **When to Use**

Use the skills to gather information, and fill out forms in the following situations:

- \* When a new client arrives at the agency for the first time.
- \* When a client arrives for an appointment with another service provider, and information is needed (e.g., a counselor, intake interviewer, etc.).

There are four primary activities and five optional activities (depending on the situation) involved in gathering information and filling out forms. The four primary activities are:

- 1) Describe your role.
- 2) Ask client to provide needed information.
- 3) State a rationale for requesting information.
- 4) Offer to help the client.

### **1) Describe Your Role**

While looking at the client, you should state the nature of your job and how it pertains to the client with whom you are having an appointment. Explain in a sentence or two that part of your job is to gather necessary information for the agency.

"The agency requires that I gather some information about your present living conditions, Mr. Jones."

"Part of my job, Mrs. Smith, is to find out whether you are presently receiving any formal health care."

Describing your role helps the client to understand the reason for the questions that will follow. Making your job duties clear to the client helps reduce misunderstandings as to why personal questions are being asked. This makes it more likely that the client will cooperate and feel less anxious, annoyed, or intimidated during the appointment.

### **2) Ask the Client to Provide Needed Information**

Look at the client, and request that he/she fill in all of the information required for service. This information might also be requested in the form of a helper interviewing a client. The request should be in the form of a full sentence and using the word "please."

"Please answer the following questions."

"Please complete this information sheet."

"Would you please fill out this information?"

"Complete this form, please."

"I'm going to ask you some questions and need you to provide some information, O.K.?"

Asking the client to provide information helps to ensure that the client's record will be complete and up-to-date. Also, asking the client to provide information gives him or her some

responsibility for the completeness and accuracy of the records. This decreases the possibility that the client will wonder what is in those records.

### **3) State a Rationale for Requesting the Information**

While looking at the client, provide a sentence description of why the information is necessary to the agency and client's case.

"We need to gather this information on each client so United Way will know how many clients we have served and what types of services have been provided."

"We need this information so that the pharmacy will know who you are and that we have provided you with three free prescriptions."

By stating the rationale for requesting information, the client has a clear understanding of why the information was requested and what it will be used for. This helps to reduce any anxiety (e.g., the information may be reviewed, and services might be discontinued). Stating the rationale also demonstrates respect for the client's right to be informed about his/her records.

### **4) Offer to Help the Client**

You should always offer assistance to the client when requesting information. This means while looking and smiling at the client, offer your help if he/she has questions.

"If you have any questions about the information, please feel free to ask me."

"Let me know if I can be of any assistance."

Offering the client help in providing the information communicates friendliness and helpfulness. It also makes it easier for the client to ask questions or request assistance once it has been offered. The client should not feel that he/she is interrupting or bothering the agency worker by asking for help.

The five optional activities that depend on the particular situation include:

- 1) Provide help to the client, if requested.
- 2) When a service provider is busy, indicate when he/she will be available.
- 3) Indicate when you or another service provider are available.
- 4) Provide within-agency referral.
- 5) Provide outside-agency referral.

### **1) Provide Help to the Client, If Requested**

You should respond to a client's request for help as quickly as you can--within 5 seconds of the request, if possible. This means either acknowledging the client's question and asking how you may help or acknowledging the client's question and providing physical assistance.

"Yes, what can I do for you, Mr. Smith?"

[When a client asks, "Do you have a pencil I can borrow?"] "Yes, I do." [Hand the pencil to the client.]

Providing help to a client when he/she asks for it ensures that information will be recorded accurately. Further, providing prompt assistance will demonstrate your commitment to serving the client.

### **2) When a Service Provider Is Busy, Indicate When He/She Will Be Available**

Sometimes a client arrives at the agency to talk with a service provider other than yourself, such as a counselor or intake interviewer. That person may not be able to see the client at that moment. You should explain that the service provider is unavailable, and indicate when he/she will

be free. Be specific about the length of the wait and, if necessary, check with the provider to find out how long the delay will be.

"Mr. Johnson, Ms. Anderson is busy with another client right now, but she will be able to see you in about 20 minutes."

"The fellow who handles our emergency food situation is out on a pick-up now. However, he should be back in about 15 minutes."

NOTE: If the delay is going to be longer than 30 minutes, you should: a) indicate when the service provider will be available, and b) ask if the client would like to reschedule.

"I'm sorry, Mr. Jones, but Mrs. Dean won't be able to see you for about 40 minutes or so. Do you care to wait, or would you prefer to make another appointment?"

"I'm sorry, but it will be an hour before Miss Edwards can meet with you. Would you care to reschedule or wait?"

Indicating that a service provider is not presently available and stating how long the wait will be both informs the client and allows him or her to make a choice about whether to wait or come back later. This gives the client some control of the situation.

### **3) Indicate When You or Another Service Provider Are Available**

As soon as you or a service provider is able to see a client, let the client know. Look directly at the client, and state that you or a service provider is now available.

"Mrs. Dean will see you now."

"Our emergency food person just got back and said that he can talk with you now."

"I am able to help you now, Mr. Wilson."

### **4) Provide Within-Agency Referral**

If another service provider in your setting would be more appropriate for a client, provide a within-agency referral.

a) Let an agency worker know the client is here.

"There is a client who needs to see you."

[For job placement] "There is a client requesting job placement assistance to see you."

b) Request immediate services.

"Can you talk with her now?"

"Is now a good time?"

c) If service provider is available immediately, say so (see #3).

d) Direct client to service provider.

"Mr. Jones' office is the first door on your right."

e) If a service provider cannot see a client immediately, ask when he/she will be available.

"How long will it be until you can see him?"

"When will you be able to see her?"

f) If service provider will be available within 15 minutes, tell the client (see #2).

g) Ask client to have a seat.

"Won't you have a seat?"

"Please have a seat."

h) When available, direct client to service provider (see #3).

i) If service provider is unavailable, determine his/her availability. Ask either service provider [see (e)] or others knowledgeable about staff's availability).

Ask either the service provider or another agency staff member when a service will be available.

[When talking to another staff member]:

"Do you know when Mr. Jones will be available?"

"How long will Mr. Jones be gone?"

j) State when service provider will be available (see #2).

k) Check to see if time is convenient for client.

"Will that be convenient for you?"

"Can you wait that long?"

l) Schedule another appointment, if necessary.

"Would you like to come back tomorrow at 10 a.m. to see Mr. Jones?"

"Mr. Jones could see you later today at 3 p.m. Will that work for you?"

Providing a within-agency referral assures that the client will receive the appropriate services from the appropriate service provider. It also demonstrates your responsiveness in providing the needed services to the client.

### 5) Provide Outside-Agency Referral

If another person or agency besides yours would be more appropriate for a client, you should provide an outside-agency referral. This involves:

a) Telling the client about another referral source.

"I know someone else who can help you. "

"There's another place that provides those services."

b) Direct client to referral source.

"The Emergency Food outlet can help you. They are located at 1st and Main St."

"Dr. Agnes will be able to help you. She works at Memorial Hospital."

c) If a referral source is not known, determine if your agency staff or staff from other agencies would know a referral source.

[To director of your agency] "Can you recommend someone to talk to Miss Smith about housing opportunities?"

[Phone call to other agency] "I have a client looking for employment options. Can you or do you know anyone who can help him?"

d) If you find a referral, tell the client you've found someone [see (a)].

e) Direct client to the referral source [see (b)].

f) If you couldn't find a referral, tell client that you were unable to find one.

"I'm sorry; I can't recommend a referral source." "I don't know of any referral source."

Providing an outside-agency referral can help a client receive needed services. It demonstrates your responsiveness by trying to locate help for the client.

Fill in the blanks using the skills you have learned for obtaining needed information from clients.

#### Exercise 1

Worker: Hello, may I help you?

Client: Yes, I'm interested in learning more about your services.

Worker: May I have your name, please?

Client: Pete Jones.

Worker: Won't you please have a seat?

Worker: \_\_\_\_\_

Client: O.K. What do I need to do?

Worker: \_\_\_\_\_

Client: I have a question about annual income. Do you mean both mine and my wife's combined?

Worker: \_\_\_\_\_

Client: Thank you very much. That helps a lot. [Phone rings]

Worker: \_\_\_\_\_

Client: Oh, that's O.K.

[Service provider just learned that intake interviewer wouldn't be able to see the client for 20 minutes.]

Worker: \_\_\_\_\_

Client: O.K., I'll wait to see her.

[20 minutes pass, and the intake interviewer will see the client now.]

Worker: \_\_\_\_\_

Client: Thank you.

### **Summary**

In summary, the steps involved in gathering information and requesting that a client fill out an information form as follows:

- 1) Describe your role.
- 2) Ask client to provide needed information.
- 3) State the rationale for requesting the information.
- 4) Offer to help the client.

Optional steps depending on the situation include:

- 1) Provide help to the client, if requested.
- 2) When a service provider is busy, indicate when he/she will be available.
- 3) Indicate when you or another service provider are available.
- 4) Provide within-agency referral.
- 5) Provide outside-agency referral.

## **STUDY GUIDE**

### **Review Questions**

Please answer all of the following questions. If you have trouble with any of them, please reread that section and try again.

- 1) When is it important to gather information and request that clients provide information?
- 2) What are the four recommended activities for gathering information? What does each activity involve?
- 3) What are five optional activities involved in gathering information? What does each activity involve?
- 4) Why is it important to gather information in an appropriate way?
- 5) If there is going to be a delay of 20 minutes or more, what two things should you do?

### **Skills Practice**

Here are some exercises that will allow you to practice your information-gathering skills. Feel free to make up your own situations, too.

**Exercise 1**

A new client has entered the local recreational center for the first time and wants to become a “member.” A receptionist (who is practicing the skills) is seated at the front desk of the facility and greets the client.

**Exercise 2**

A client has come to the free medical clinic to get free prescriptions and needs to see someone about this. The nurse on duty has just entered the waiting room from one of the treatment rooms.

**Exercise 3**

You have just met a client who needs to talk with a peer counselor about finding a part-time job. You are a peer counselor in a local independent living skills center.

**Exercise 4**

You have a client who needs housing assistance. No one in your agency can provide the type of assistance he/she needs.

**SKILLS CHECKLIST**

Skill	Practice Session Number			
	1	2	3	4

**GREETING**

Make an initial greeting.  
 Ask if help is needed.  
 Request client's name.  
 Ask client to have a seat.

**INFORMATION**

Describe your role.  
 Ask client to provide needed information.  
 State a rationale for requesting information.  
 Offer to help the client.  
 Provide help to client, if requested.  
 When a service provider is busy, indicate when he/she will be available.  
 Indicate when you or another service provider are available.  
 Provide within-agency referral.  
 Provide outside-agency referral.

**GENERAL**

Use active listening.  
 Ask if help is needed.  
 Request client's name.  
 Ask client to have a seat.  
 Maintain eye contact.  
 Make facial expressions.  
 Make nonverbal encouragements.  
 Make verbal encouragements.  
 Use open-ended questions.



Use close-ended questions.

X = Well done

O = Needs work

## **CHAPTER 9: CLOSING THE APPOINTMENT**

Clients appreciate receiving courteous and thorough services from an agency. The way you close an appointment will affect the client's attitude toward the agency.

### **When to Use**

Use skills to close an appointment in the following situations:

- \* The client has received all the information and services he/she needed.
- \* The service provider has obtained all necessary information from the client (e.g., in an intake interview).
- \* The client needs to talk with another service provider (e.g., a counselor).

There are three necessary activities in closing an appointment and four optional activities.

They depend on the situation. The three necessary activities are:

- 1) Ask if the client has any questions.
- 2) Offer further help.
- 3) Make a closing statement.

### **1) Ask If the Client Has Any Questions**

When a client is about to leave your desk, ask if he/she has any other questions or comments.

"Are there any comments you would like to make?"

"Do you have any questions?"

Taking the time to ask and listen to clients helps ensure service that is both thorough and courteous.

### **2) Offer Further Help**

Make clear your willingness to provide further assistance to the client.

"Is there anything else we can do for you?"

"Please don't hesitate to let me know if I can be of further help."

Offering help makes it easier for a client to ask for it, if he/she needs assistance next time.

### **3) Make a Closing Statement**

While looking and smiling at the client, make a brief closing statement. Use the client's name, if you know it.

"Have a pleasant day."

"Good-bye, Mrs. Smith."

"It's been nice talking to you."

"Hope you got what you needed, Bill."

Optional activities that depend on the situation require you to:

- 1) Answer the client's questions (if any).
- 2) Provide additional services (if requested).
- 3) Direct the client to another service provider (if necessary).
- 4) Schedule next appointment (if necessary).

### **1) Answer a Client's Questions**

While looking at the client and smiling, answer questions he/she may have briefly and in a friendly manner.

[If a client asks when cheese will be available again] "Cheese will be available on the third Tuesday of the month."

[If a client asks what time it is] "It is 3:15 p.m., Mr. Jones."

Answering all of the client's questions finalizes the interview for both client and agency worker.

## **2) Provide Additional Services, If Requested**

If a client requests further services, provide those services as quickly as possible.

[If the client wants to meet with a peer counselor at your agency] "I would be glad to schedule an appointment for you with our peer counselor, Mr. Jones."

[If a client requests a copy of an agency newsletter] "I have a copy for you right here in this filing cabinet, Miss Smith. Here you are." [Hands newsletter to client.]

## **3) Direct Client to Another Service Provider, If Necessary**

Look at the client while providing a description of the location of the service provider. This means either telling the client where to go to see the other service provider or making a statement about the location while motioning with your hand toward the direction of the service provider.

"Mr. Dillon's office is the first door on the right." "Miss Edwards is in the back room right through that door." [Motion with hand toward the door]

"Mrs. Johnson's office is located at 312 Main St., just 1/2 mile further on this street."

If the client has been waiting to see another service provider at your agency, such as a counselor, provide directions when that service provider becomes available. If it is necessary to refer the client to another agency for additional services, describe how to get there. Providing directions demonstrates courtesy and concern for the client.

## **4) Schedule Next Appointment, If Necessary**

If a client needs to come back for another appointment, schedule it right away. Agree upon day and time to meet, and make two notes (one for yourself and one to give to the client).

"When should we meet again?"

"How does Monday at 2 p.m. sound?"

Scheduling another appointment lets clients know that an honest effort is being made to provide requested services.

## **Summary**

In summary, the steps in closing an appointment include:

- 1) Ask if the client has any questions.
- 2) Offer further help.
- 3) Make a closing statement.
- 4) Answer the client's questions (if any).
- 5) Provide additional services (if requested).
- 6) Schedule next appointment (if necessary).
- 7) Direct client to another service provider (if necessary).

## STUDY GUIDE

### Review Questions

Please answer all of the following questions. Return to the appropriate section, if you have problems with any question, reread it, and try again.

- 1) When should you close an appointment?
- 2) There are seven activities involved in closing an appointment. What are they? Which four are optional activities that depend on the situation?
- 3) What do each of the seven activities involve?

### Skills Practice

The following exercises can be practiced with a friend.

#### Example

Worker: [Request client's questions.]

Client: No, I don't.

Worker: [Offer further help.]

Client: Not today, thanks.

Worker: [Make a parting greeting.]

Client: Excuse me, what hours are volunteers to work?

Worker: [Answer client's questions.]

Client: May I have your card?

Worker: [Provide additional services, if requested.]

Client: Thank you very much.

Worker: [Schedule next appointment.]

Client: O.K. Tuesday at 9 a.m.

Worker: [Direct client to another service provider.]

#### Exercise 1

You are a receptionist in a recreational drop-in center, and you have just completed filling out the membership form for a new client who entered the center. The client is getting ready to leave.

#### Exercise 2

The intake interviewer of the local welfare agency has just let you (the receptionist) know that he/she will see the client now. The client is interested in vocational opportunities.

#### Exercise 3

You are a client and have just had a long discussion about problems you have had locating low-cost housing with a counselor at the Housing Assistance Center. Now you are ready to check out some houses the counselor suggested.

## SKILLS CHECKLIST

Skill	Practice Session Number			
	1	2	3	4

### GREETING

Make an initial greeting.  
Ask if help is needed.  
Request client's name.  
Ask client to have a seat.

### **INFORMATION**

Describe your role.  
Ask client to provide needed information.  
State a rationale for requesting information.  
Offer to help the client.  
Provide help to client, if requested.  
When a service provider is busy, indicate when he/she will be available.  
Indicate when you or another service provider are available.  
Provide within-agency referral.  
Provide outside-agency referral.

### **GENERAL**

Use active listening.  
Ask if help is needed.  
Request client's name.  
Ask client to have a seat.  
Maintain eye contact.  
Make facial expressions.  
Make nonverbal encouragements.  
Make verbal encouragements.  
Use open-ended questions.  
Use close-ended questions.

X = Well done

O = Needs work

## **CHAPTER 10: HANDLING SPECIAL SITUATIONS THAT MAY ARISE**

Occasionally, certain clients need additional assistance during an appointment. This chapter alerts you to special situations and recommends how you can be of assistance. Mastering these strategies will make you feel confident about handling any of these situations.

Examples include:

- \* Incomplete information forms.
- \* Obstacles in the physical environment.
- \* Interruptions.
- \* Client with difficulty in reading and/or understanding information forms or instructions.
- \* Client with difficulty in writing.
- \* Client with difficulty in speaking clearly.
- \* Client with visual impairment.
- \* Client with hearing impairment.
- \* Speaking to a personal care assistant or a client's friends and not the client.
- \* Avoiding rude behavior.

- \* Client who verbally abuses staff.
- \* Client who physically abuses staff.
- \* Referring to clients with disabilities.

### **Incomplete Information Forms**

Gathering all needed information is necessary when providing help to a client. Incomplete information forms can delay or hurt a client's chances of receiving agency services. If you encounter a client who has not filled out an information form completely, do the following:

- 1) Describe the discrepancy to the client.
- 2) Offer assistance.
- 3) Recheck the information sheet for completeness.
- 4) If complete, state appreciation to the client.
- 5) If not complete, go to step 1, and repeat process.

#### **1) Describe the Discrepancy to the Client**

In full sentence form, describe the error to the client.

"There are a couple of pieces of information missing here."

"We need just a little more information under Item 4."

An inappropriate example would be:

"You left some things out."

It is important to be specific and positive when pointing out the discrepancy to the client. This helps to maintain a positive atmosphere.

#### **2) Offer Assistance**

Immediately after you point out a discrepancy, offer assistance.

"May I help you with these questions?"

"How can I help you with Item 4?"

Offering assistance in this way helps ensure that you get complete information.

#### **3) Recheck the Information Sheet for Completeness**

Once the client has filled in the information sheet to the best of his/her ability, recheck the sheet to make sure all the necessary information has been provided. You should read over those questions that were not answered or partially answered before to see if they are now complete.

#### **4) If the Sheet Is Complete, State Your Appreciation to the Client**

When all the information on the form has been filled in by the client, state your appreciation.

"Thank you for completing this information sheet so thoroughly."

"I appreciate you filling out this information sheet, Mr. Smith."

Stating appreciation increases the chances that the client will completely fill out the information sheet the next time. It also makes the client glad that his/her efforts have been appreciated.

#### **5) If Not Complete, Go to Step 1**

If there are still pieces of information missing after offering assistance the first time, then repeat the above process, starting with Step 1.

### **Example**

Worker: We need just a little more information, Mr. Welsh.

Client: Oh, okay.

Worker: Would you like me to help you with this information form?

Client: No thanks. I'll finish it. [Client completes the rest of the form.]

Worker: [Checks to see that all questions have been completed.] Thanks for filling out this information, Mr. Welsh.

Read the following examples of situations where clients have not fully completed the information sheet. Please complete the recommended sequence of responses.

### **Exercise 1**

Worker: [Notifies that form is not complete] \_\_\_\_\_

Client: Oh, sorry about that.

Worker: \_\_\_\_\_

Client: No thanks, I'll do it. [Completes the form and hands it to worker.]

Worker: [The form is now complete.] \_\_\_\_\_

Client: You're welcome.

### **Exercise 2**

Worker: [Notifies that form is not complete] \_\_\_\_\_

Client: Yes, I had trouble with those questions.

Worker: \_\_\_\_\_

Client: Oh yes, thanks.

Worker: [Reads questions to client and helps clear up questions and rechecks form]

Client: Thank you for your help.

Worker: \_\_\_\_\_

Client: No problem.

### **Obstacles in the Physical Environment**

If you notice that the client's mobility is impaired by an obstacle in the office, or if the client states that he/she needs assistance, you should offer to help the client.

Some examples of obstacles include:

- \* Tables or chairs blocking a person's path (e.g., for a person in a wheelchair or on crutches).
- \* Bunched-up carpet interfering with a person's wheelchair mobility, crutches, cane, or baby stroller.
- \* Inaccessible rest rooms.

Examples of offering assistance include:

"How may I be of help?"

"May I help you?"

"Is there something I can do to help?"

Offering assistance to the client not only conveys a helpful attitude, but also demonstrates respect by allowing the client to decide whether he or she needs help. Remember, offer assistance first, then provide it if requested by the client.

Another form of offering assistance is opening the door for the client long enough for the client to walk or move through. This should take place in the following situations:

- \* When leading a client to another room/office (e.g., intake interviewer's office).
- \* When helping a person into his/her car.

Please complete the following exercises by offering assistance to the client.

**Exercise 1**

Client: [Can't get to reception desk, because a chair is blocking his/her path]

Worker: \_\_\_\_\_

**Exercise 2**

Client: [Is unable to get out of the agency due to bunched-up carpet on floor in front of the agency door]

Worker: \_\_\_\_\_

**Interruptions**

Any time there is an interruption, it is important to look at the client and apologize within 10 seconds after the interruption occurs. Common interruptions include a ringing telephone and other individuals approaching your desk and beginning to talk while you're talking with the client.

"Excuse the interruption, Mr. Edwards."

"I'm sorry for the phone ringing."

"Sorry about that."

Excusing interruptions demonstrates that you consider the client important and that your discussion will only be interrupted temporarily.

Please complete the following exercises on excusing interruptions during the appointment.

**Exercise 1**

Client: And right now I'm looking for a job.

Worker: [Phone rings] \_\_\_\_\_

**Exercise 2**

Client: I'm really glad I was able to come in and talk with you today.

Worker: [Another co-worker comes up and starts talking] \_\_\_\_\_

**Client With Difficulty in Reading and/or Understanding Information Forms or Instructions**

You should verbally offer assistance (e.g., reading or interpreting) for the client if he/she states that he/she does not understand particular parts of the information form or instructions.

Some examples of the client stating difficulty in reading and/or understanding include:

"I don't understand what this question is asking."

"I can't read this form very well."

Some examples of offering assistance include:

"How may I help you with the information form?"

"Which ones don't you understand?"

It is best to offer assistance with the information form or instructions after a client has stated he/she needs help. Don't assume that a person is having difficulty and offer assistance-- before it is needed. This can offend a client. Assisting the client after help is requested fosters good relations between you and the client and also increases the chances that the information collected will be clear and correct.

Please complete the exercises on offering assistance to a client who is having difficulty reading or understanding the information form.

### **Exercise 1**

Client: This doesn't make much sense to me.

Worker: \_\_\_\_\_

### **Exercise 2**

Client: I'm having trouble reading this form.

Worker: \_\_\_\_\_

### **Client With Difficulty in Writing**

If a client is having difficulty writing with a pen or pencil or is not able to write on the information form at all, assist him/her in filling out the form. Again, ask the client how you can help.

“How may I help you in filling out the form?”

“Is there something I can do to assist you in filling out the form?”

Allow the client to *instruct you* as to how you can help (e.g., writing on the form for the client). This lets the client communicate the way in which he/she would prefer to be helped.

Please complete the following exercises on how to offer assistance to a client who is having difficulty writing.

#### **Exercise 1**

Client: I can't seem to hold onto the pencil today.

Worker: \_\_\_\_\_

#### **Exercise 2**

Client: [Is scribbling on information form]

Worker: \_\_\_\_\_

### **Client With Difficulty in Speaking Clearly**

You should listen carefully to a client who is having difficulty speaking to you. If you do not understand what the client said, request that he/she repeat the message. If you still cannot understand the client, request that he/she write the message down on paper for you. It is important in either situation to take time with the client, and listen carefully.

"Would you please repeat that again?"

"Could you please repeat what you just said? I did not understand."

"I'm sorry, I don't speak Spanish, but I'll be right back with someone who does."

"Would you please write that down for me?"

"Could I ask you to please write that down for me? I'm having difficulty understanding."

Take the time to listen carefully and to clarify messages.

### **Client With Visual Impairment**

If you encounter a client who has a visual impairment (e.g., a patch on one eye, very thick corrective glasses, is blind) you should offer assistance if he/she requests it or if you notice that he/she may need assistance. Some examples of this difficulty include:

A client who is bumping into objects in the agency

A client who is holding the information form very close to his/her face

A blind client with a walking stick who is having difficulty getting around the agency

Some examples of offering assistance to visually impaired clients include:



[For a client who requests help or you notice is having difficulty reading] "How can I help you with that information form?"

[For a client who is bumping into objects in the agency or having difficulty getting around the agency] "May I help you find a seat?"

Offering assistance to visually impaired clients helps communicate concern and a friendly attitude. Also, by asking how you can help, you have treated the client more courteously than simply "helping" him/her to a seat.

Please complete the following exercises on offering assistance to visually impaired clients.

### **Exercise 1**

Client: I really can't see the words on this form very well.

Worker: \_\_\_\_\_

### **Exercise 2**

Client: [Enters agency and is blind, begins to bump into objects in the agency]

Worker: \_\_\_\_\_

## **Client With Hearing Impairment**

If you encounter a client who has a hearing impairment (e.g., can only hear you when you talk loudly or cannot hear at all), you should offer assistance to that client if he/she requests it or if you are having a difficult time communicating with the client.

\* Clients who don't respond to what you say obviously don't hear you.

\* Clients who begin signing (sign language) to you when you begin to talk.

Some examples of offering assistance include:

[Client is hard of hearing.]

Worker: [Speak louder and look directly at the client.]

[Client is completely deaf.]

Worker: [If you know sign language, use it. If not, write down what you want to communicate to the client, and show it to him/her.]

Offering assistance to hearing impaired clients helps show your interest in making sure that they can understand what you have to say.

Please complete the following exercises on offering assistance to hearing impaired clients.

### **Exercise 1**

Client: I can't hear what you are saying.

Worker: \_\_\_\_\_

### **Exercise 2**

Client: [Begins signing to you]

Worker: [You don't know how to sign.] \_\_\_\_\_

## **Speaking to a Personal Attendant or a Client's Friend and Not the Client**

If you encounter a client who is accompanied by a personal attendant, relative, or friend, you should always talk to the client when discussing issues that concern him/her. Remember to maintain eye contact and speak clearly. Some inappropriate examples of speaking to a personal attendant instead of a client include:

"Does he/she [referring to client but looking at the personal attendant] have any questions?"

"Do you think he can see us again next week?" [While looking at the personal attendant]

Some appropriate examples of speaking directly to a client include:

[While looking directly at the client] "Can you make an appointment next Friday, Mr. Smith?"

"May I help you?"

"Do you have any questions?"

Speaking to the client (and not speaking to the client through another person) demonstrates respect and interest in that person as an individual. It also helps communicate that he/she is recognized as the client.

Please complete the following exercises for speaking to the client and not his/her personal care attendant or friend.

### **Exercise 1**

[Client arrives at the local poverty agency with a friend. The client approaches the receptionist's desk first.]

Worker: \_\_\_\_\_

### **Exercise 2**

[A disabled client in a wheelchair arrives at the doctor's office for his appointment, with his personal attendant pushing him into the office.]

Worker: \_\_\_\_\_

## **Avoiding Rude Behavior**

You should avoid talking with individuals other than the client about issues/topics not relevant to the client and/or engaging in activities not relevant to the client. This might occur when you are talking with the client or while the client is waiting in the waiting area.

Examples of talking with others about things not relevant to the client would include:

Discussing for a duration of at least 20 seconds sports, weather, personal life, or any other topic not relevant to the client. This may be done while on the phone or in person with an individual other than the client.

Examples of talking with others about things relevant to the client would include:

"I'm busy with a client right now. "

Asking other employees questions that you may not be able to answer for the client.

**\*Exception:** (The only exception to this would include a request by your employer to briefly discuss [20 seconds or less] issues not relevant to the client, or emergency situations which require you to discuss issues not relevant to the client's specific case, e.g., a report which needs to be filed or contacting the police or paramedics/ambulance in case of a medical emergency.)

Examples of activities not relevant to the client include:

- \* Balancing one's checkbook
- \* Reading a novel/magazine
- \* Combing one's hair
- \* Listening to the radio, watching television

Examples of activities relevant to the client include:

- \* Working on this client's file
- \* Writing down information regarding this client
- \* Looking up information for this client

Attending to the client exclusively and not to others demonstrates courtesy and professionalism.

## **Client Who Verbally Abuses Staff**

Occasionally, you might encounter a client who is verbally abusive. In this situation, first ask the client what you can do for him/her. If the client does not stop verbal abuse, ask the client to leave. If he/she refuses, call the police, and have the client removed from the agency. Some examples of verbally abusive clients include:

Clients who curse or use vulgar language.

Clients who verbally threaten you. "I'm going to make sure you don't forget me!"

Some examples of dealing with verbally abusive clients include:

When a client is using vulgar language. "Is there something I can do for you?"

When a client verbally threatens you. "I would like you to leave now."

When a client has refused to leave after being asked to. "I'm going to call the police and have them remove you."

Handling the situation in this way ensures that you have attempted to deal with the client in the best way you could and that you gave the client the chance to decide if he/she was going to cooperate.

Please complete the following exercises on dealing with verbally abusive clients.

### **Exercise 1**

Client: I think you and this agency stink.

Worker: \_\_\_\_\_

### **Exercise 2**

Client: Who do you think you are?

Worker: \_\_\_\_\_

Client: I don't need any of your help. You don't have brains enough to help me.

Worker: \_\_\_\_\_

Client: Make me leave.

Worker: \_\_\_\_\_

## **Client Who Physically Abuses Staff**

If a client is physically abusive toward you or another staff member, first attempt to avoid further physical confrontation with the client. Second, request that the client leave the agency. Some examples of clients physically abusing staff include:

\* Hitting, punching, kicking, biting, scratching, or spitting on staff

\* Throwing various objects at staff (e.g., pens, books, chairs, etc.)

Some examples of dealing with clients who are physically abusive toward you include:

\* Removing yourself from the client's reach and further physical confrontation.

\* Seeking your employer or other staff for assistance.

\* [Saying] "I would like you to leave the agency now."

Some examples of dealing with clients who are abusive toward other staff or clients include:

\* Requesting help from other staff to stop client from abuse.

\* Calling the police and reporting the emergency.

Handling clients who are physically abusive in this way decreases the chances of your being physically harmed. Although encounters with physically abusive clients are infrequent, it is best to be prepared.

Please complete the following exercises for dealing with physically abusive clients.

**Exercise 1**

Client: [Has just hit you]

Worker: \_\_\_\_\_

**Exercise 2**

Client: [Is throwing objects at you]

Worker: \_\_\_\_\_

**Exercise 3**

Client: [Is kicking another staff person]

Worker: \_\_\_\_\_

**Referring to Clients With Disabilities**

When talking with or referring to a client who is disabled (either mentally, physically, or both), you should use appropriate terminology. Some examples of inappropriate terms include:

- \* Afflicted
- \* Confined to a wheelchair
- \* Crippled
- \* Deaf and dumb
- \* Deaf mute
- \* Deformed
- \* Defective
- \* Helpless
- \* Infirm
- \* Invalid
- \* Patient
- \* Useless
- \* Victim
- \* Wheelchair-bound

Some examples of appropriate terms to use include:

- \* Blind
- \* Deaf
- \* Developmentally disabled
- \* Disabled
- \* Disabled person
- \* Physically disabled
- \* Hearing impaired
- \* Mentally disabled
- \* Persons with a disability
- \* Person using a wheelchair
- \* Visually impaired
- \* Speaking impaired

Reference to disabled clients using appropriate terminology demonstrates respect and courtesy for that client. You should always use appropriate terminology when talking with or referring to disabled clients. It certainly will create a more positive atmosphere during the appointment.

Please complete the following exercises for referring to clients with disabilities.

**Exercise 1**

[A retarded client, Mr. Smith, is sitting in the waiting area in anticipation of his appointment with the peer counselor. The peer counselor comes out of his office and up to your reception desk and asks you: "Which client is Mr. Smith?"]

Worker: (the receptionist) \_\_\_\_\_

**Exercise 2**

[You are describing the last client you completed an intake interview with to your boss. This client was in a wheelchair. Your boss asks you, "What did she (the client) look like?"]

Worker: \_\_\_\_\_

## Summary

In summary, special situations that may arise include:

- \* Incomplete information forms.
- \* Obstacles in the physical environment.
- \* Interruptions.
- \* Client with difficulty in reading and/or understanding information forms and instructions.
- \* Client with difficulty in writing.
- \* Client with difficulty in speaking clearly.
- \* Client with a visual impairment.
- \* Client with a hearing impairment.
- \* Speaking to a personal care attendant or a client's friend and not the client.
- \* Avoiding rude behavior.
- \* Client who verbally abuses staff.
- \* Client who physically abuses staff.
- \* Referring to clients with disabilities.

## STUDY GUIDE

- 1) List all special situations that may arise in a service agency.
- 2) For each of the potential special situations, suggest ways of handling those situations.
- 3) Why is it important to:
  - a) Make sure information forms are correct?
  - b) Remove obstacles from the environment?
  - c) Assist clients with reading and/or difficulty in understanding information forms?
  - d) Assist clients with writing and speaking difficulties?
  - e) Offer help to a visually or hearing-impaired client?
  - f) Speak to the client and not his/her personal care attendant or friend?
  - g) Avoid behaving rudely?
  - h) Handle clients who are verbally or physically abusive in the recommended way?
  - i) Refer appropriately to clients with disabilities?

## Skills Practice

Here are some exercises to help you practice how to handle different special situations. It is best to practice with a friend, and feel free to generate your own examples.

### Exercise 1

You have just had a client come up to your desk stating that he does not understand parts of the information form.

### Exercise 2

A client in a wheelchair is having difficulty getting through the crowded waiting area to your desk.

### Exercise 3

A client arrives for her appointment with her personal attendant. She (the client) has some questions about the services you provide.

### Exercise 4

A client has just approached your desk and is inquiring about medical services. Another employee approaches your desk to chat.

**Exercise 5**

A client is having difficulty holding the pencil and writing clearly and has requested your assistance.

**Exercise 6**

A client is describing his living arrangements to you, but he is having difficulty speaking clearly.

**Exercise 7**

Your next intake interview is with a visually impaired client. She is waiting in the reception area.

**Exercise 8**

A client with a hearing impairment has arrived at your recreation agency interested in coaching children's soccer. You (the receptionist) are having difficulty talking with the client.

**Exercise 9**

A client at your local job placement center has just finished calling you vulgar names. You are the job placement counselor in the agency.

**Exercise 10**

You (the receptionist) have just asked a client who was verbally abusive to leave your medical service agency. She refused and slapped you in the face.

**Exercise 11**

The peer counselor at the local poverty agency has just asked you (the receptionist) who his next client is. You do not know the client, but she is on crutches.

**SKILLS CHECKLIST**

Skill	Practice Session Number			
	1	2	3	4

**GREETING**

Make an initial greeting.  
 Ask if help is needed.  
 Request client's name.  
 Ask client to have a seat.

**INFORMATION**

Describe your role.  
 Ask client to provide needed information.  
 State a rationale for requesting information.  
 Offer to help the client.  
 Provide help to client, if requested.  
 When a service provider is busy, indicate when he/she will be available.  
 Indicate when you or another service provider is available.  
 Provide within-agency referral.  
 Provide outside-agency referral.

**GENERAL**

Use active listening.  
 Ask if help is needed.  
 Request client's name.

Ask client to have a seat.  
Maintain eye contact.  
Make facial expressions.  
Make nonverbal encouragements.  
Make verbal encouragements.  
Use open-ended questions.  
Use close-ended questions.

### **SPECIAL SITUATIONS**

Assist client in completing information forms.

- Describe the discrepancy.
- Offer assistance.
- Recheck information sheet for completeness.
- If complete, state appreciation.

Remove obstacles in the physical environment.

Excuse interruptions, if any.

Assist clients who have difficulty in reading or understanding information forms or instructions.

Assist clients with difficulty in writing.

Assist clients with difficulty speaking clearly.

Assist clients with visual impairments, if needed.

Assist clients with hearing impairments, if needed.

Speak to client, not personal attendant or friend.

Avoid rude behavior.

Deal with verbally abusive client.

Deal with physically abusive client.

Refer appropriately to clients with disabilities.

### **CLOSING**

Ask if client has any questions.

Offer further help.

Make a closing statement.

Answer the client's questions, if any.

Provide additional services, if requested.

Schedule next appointment, if necessary.

Direct client to another service provider, if necessary.

X = Well done

O = Needs work

## **CHAPTER 11: PUTTING IT ALL TOGETHER**

This chapter includes an exercise and skill practice section designed to help you practice all the skills you have learned. For the exercise, read the situation below, then fill in the blanks with an example of what you would do or say to the client. For example, you could respond to the situation "Client arrives at office and walks up to your desk" with "Hello, may I help you?"

## Situation

Mr. Smith, a friend of a member of the local poverty agency, has come by to inquire about membership opportunities and types of services provided. You are busy typing at your receptionist desk when Mr. Smith enters the agency in his wheelchair. NOTE: Remember to use the nonverbal encouragements throughout the appointment.

Mr. Smith: [Arrives at agency and rolls up to your desk]

1. Make an initial greeting: \_\_\_\_\_

2. Ask if help is needed: \_\_\_\_\_

Mr. Smith: I've come to learn more about becoming a member of this agency and what all that involves.

3. Request client name: \_\_\_\_\_

Mr. Smith: Bill Smith.

4. Thank client: \_\_\_\_\_

Mr. Smith: Thank you.

6. Describe your role: \_\_\_\_\_

7. Ask client to complete information sheet: \_\_\_\_\_

8. State the rationale for requesting completion of the information sheet: \_\_\_\_\_

9. Offer help to the client: \_\_\_\_\_

Mr. Smith: Here's the form. [A few items are not filled in.]

10. Provide help: \_\_\_\_\_

11. Describe discrepancy to client: \_\_\_\_\_

12. Offer assistance: \_\_\_\_\_

[Mr. Smith fills in the form.]

13. Recheck the information sheet for completeness: \_\_\_\_\_

14. State appreciation for completing sheet: \_\_\_\_\_

15. Request client's present work situation with an open-ended question: \_\_\_\_\_

Mr. Smith: I have been working part-time at City Hall as a janitor.

16. Listen actively: \_\_\_\_\_

Mr. Smith: I just wish I knew if better opportunities were going to open up.

17. Ask close-ended question to get feedback on your understanding of what the client just said: \_\_\_\_\_

Mr. Smith: Yeah, that's right. Working full-time would be real nice.

18. Make verbal encouragement: \_\_\_\_\_

19. Request information about children using a close-ended question: \_\_\_\_\_

Mr. Smith: I have 2 children. The oldest boy is 13, and my youngest boy is 7.

[The phone rings.]

20. Excuse interruption: \_\_\_\_\_

21. [Hang up phone] Indicate when a service provider will be available to talk with Mr. Smith about membership, since staff member is unavailable at the moment: \_\_\_\_\_

Mr. Smith: Oh, O.K.

22. Request if client has any questions: \_\_\_\_\_

Mr. Smith: As a matter of fact, I was curious... could I have a copy of your newsletter to look at?

23. Offer further assistance by providing client with newsletter: \_\_\_\_\_

Mr. Smith: Well, thank you. That is very nice.

24. Indicate that the service provider is available: \_\_\_\_\_

Mr. Smith: Great. Thanks for all your help.

25. Make a closing statement: \_\_\_\_\_



26. Direct client to service provider's office: \_\_\_\_\_

## STUDY GUIDE

### Skills Practice

Here is an example and several exercises that you and a friend can practice to further sharpen your skills. Feel free to generate your own situations, too.

**Example** [Client arrives for annual checkup at doctor's.]

Worker [Student] [Should do greeting activities]:

- \* Make an initial greeting.
- \* Ask if help is needed.
- \* Request client's name.
- \* Ask client to have a seat.

Client [Friend] [Looking concerned]: I haven't been feeling real well lately. This month has been hectic.

Worker: [Should listen actively and make nonverbal encouragements]

Client: I think it is the stress of Christmas and all. You know how that can get to a person.

Worker: [Should make a verbal encouragement and ask open-ended questions about stress at Christmas]

Client: [Continues conversation]

Worker: [Should do information activities]

- \* Describe your role.
- \* Ask client to provide needed information—ask close-ended questions.
- \* State a rationale for requesting information.
- \* Offer to help the client.
- \* Provide help, if requested.

Client: [Has difficulty writing]--special situation

Worker: [Assist client with difficulty in writing]

- \* Indicate when a service provider who is busy will be available.
- \* Indicate when the service provider is available.

Worker: [Should do closing activities]

- \* Request the client's questions.
- \* Offer further help.
- \* Make a closing statement.
- \* Answer client's questions (if any).
- \* Provide additional services (if requested).
- \* Schedule next appointment (if requested).
- \* Direct client to another service provider (if necessary).

### Exercise 1

You are a disabled senior citizen and have difficulty hearing. You and your personal attendant have arrived at the Loan Office to inquire about borrowing money for home improvements. The service provider has just been notified that you are on your way to his office.

### Exercise 2

You are a receptionist at the local welfare office. A client just entered the agency and is being verbally abusive to you because of his dissatisfaction with "the system."

### Exercise 3

You are a receptionist at the local recreation center, and you notice that a client in a wheelchair is trying to enter the agency, but a rug is bunched up under her wheelchair tires.

#### **Exercise 4**

You are a client with a visual disability, but have come to the job placement agency because you feel you must go back to work to support your children. You have come with hopes of finding waitress work.

### **SKILLS CHECKLIST**

Skill	Practice Session Number			
	1	2	3	4

#### **GREETING**

Make an initial greeting.  
Ask if help is needed.  
Request client's name.  
Ask client to have a seat.

#### **INFORMATION**

Describe your role.  
Ask client to provide needed information.  
State a rationale for requesting information.  
Offer to help the client.  
Provide help to client, if requested.  
When a service provider is busy, indicate when he/she will be available.  
Indicate when you or another service provider are available.  
Provide within-agency referral.  
Provide outside-agency referral.

#### **GENERAL**

Use active listening.  
Ask if help is needed.  
Request client's name.  
Ask client to have a seat.  
Maintain eye contact.  
Make facial expressions.  
Make nonverbal encouragements.  
Make verbal encouragements.  
Use open-ended questions.  
Use close-ended questions.

#### **SPECIAL SITUATIONS**

Assist client in completing information forms.

- Describe the discrepancy.
- Offer assistance.
- Recheck information sheet for completeness.
- If complete, state appreciation.

Remove obstacles in the physical environment.  
Excuse interruptions, if any.  
Assist clients who have difficulty in reading or understanding information forms or instructions.  
Assist clients with difficulty in writing.

Assist clients with difficulty speaking clearly.  
Assist clients with visual impairments, if needed.  
Assist clients with hearing impairments, if needed.  
Speak to client, not personal attendant or friend.  
Avoid rude behavior.  
Deal with verbally abusive client.  
Deal with physically abusive client.  
Refer appropriately to clients with disabilities.

## **CLOSING**

Ask if client has any questions.  
Offer further help.  
Make a closing statement.  
Answer the client's questions, if any.  
Provide additional services, if requested.  
Schedule next appointment, if necessary.  
Direct client to another service provider, if necessary.

X = Well done  
O = Needs work

## **CHAPTER 12: EPILOGUE**

Congratulations! You have now completed the training designed to enhance your skill in creating a good first impression. These skills will help you establish even more positive relationships with your clients. As you use these skills responsibly and sensibly, please consider the following issues.

### **Things to Consider**

1. Sometimes when you request information from clients, you learn things that are quite personal. Whenever a client shares information, make sure that information is kept confidential. Information provided by the client should be used for agency purposes only.
2. Some agency workers are not sure when and where to use their newly learned skills. Since many of the skills taught are good communication skills, they can be used in virtually any situation. Active listening, asking courteous questions, and using nonverbal communication techniques can be used with family, friends, and co-workers as well as with agency clients.
3. It is likely that using these skills will make your work more pleasant. For example, you might find that people respond to you in a more positive and friendly way. This can be an added benefit of learning the skills.
4. It is also likely that some time after training you may forget some of the skills. In order to continue to be a good communicator, practice your skills occasionally (e.g., role playing with a friend), and refer to the manual whenever you need to. Refer to the skills checklist at the end of the last chapter to remind you of all the skills taught. It might be a good idea to keep a copy of the checklist readily available, such as in your desk or in a file for quick reference.
5. Unfortunately, no program includes all the skills and information necessary for dealing with all the different types of problems clients present. However, by incorporating your new skills with your own unique strengths, you will be able to build upon what was presented in *First Impressions*.

By using your improved communication skills, you can maintain an established standard of excellence in working with consumers. To quote *Letters and Social Aims* once again [1875],  
Life is not so short but that there is always time enough for courtesy.