

# Five Tips Help Counselors Engage Beneficiaries by Phone



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We live in a very challenging and stressful time, and the disruption of daily life is real and significant. For SHIPs and SMPs, the COVID-19 crisis brought significant adjustments in program administration and services. Like many others in the helping professions, SHIPs and SMPs are working diligently to figure out how to continue to serve beneficiaries and caregivers safely. As a result, service delivery is transitioning primarily to phone counseling. This creates some challenges. Even under ideal conditions, miscommunications or misunderstandings can be common. Because counseling over the phone can make the communication process more tenuous, it requires a concentrated focus. Here are five strategies for more effective communication by telephone:

1. Check perceptions. According to Professor Emeritus Albert Mehrabian, between 55% and 60% of believability comes from body language. Another way of looking at this is that 60% of communications are not available to the listener while on the phone. This makes it very difficult to tell if communications are understood. One strategy to ensure everyone is on the same page is called “perception checking.” The basic elements of perception checking include:
  - a. Describe what you heard in a nonjudgmental way.
  - b. Interpret what you heard in a nonjudgmental way.
  - c. Request clarification.

The technique may show that people are often talking about or perceiving things from very different perspectives or even talking about two very different things.

2. Be an active listener. This one may seem like a no-brainer, but effective listening as a counselor is a nuanced skill. A counselor needs to not only listen to what is said but also how it's said, why it's being said, and what it means in the context of that client. This is particularly true on the phone when you do not have nonverbal cues to inform your perception. If you do not understand something, ask for clarifications or use perception checking.
3. Flexibility is always a must. This is especially true during the current COVID 19 crisis. It is not unusual for beneficiaries and caregivers to want to talk about the state of things within their lives and the country as a whole. It is important to take the time to listen and acknowledge their situation and feelings. Understand that calls may take longer and that their success may hinge on your willingness to listen for a reasonable period of time.
  4. Show a genuine interest in the person on the phone. This is always true but is complicated by the lack of nonverbal cues. You can never cover up not being interested. Here are some important practices to show you are genuinely interested:
    - a. Use their name.
    - b. Actively listen. Let the other person talk and then paraphrase or summarize what you heard.
    - c. Ask questions.
    - d. Show respect. Do not interrupt while the other person is talking. Give them time to speak.
    - e. Encourage them. This is always important but even more so during trying times.
5. Avoid distractions. Focus, focus, focus! We all know how easy it is during a conference call or webinar to multitask. This becomes especially true as more and more of us are working from home, where distractions abound. Being an active listener takes focus, attention, and being in the moment with the person you are serving. Being an active listener is not a passive activity. You must work at it.
6. Toward the end of the call, provide a summary of the call, highlighting important key points discussed. This is

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important to ensure everyone is on the same page. Do this in a conversation style rather than a summary statement.

Effective engagement is relationship-based and not solely based on imparting information. The more effective you can engage those you serve, the more likely you are to meet their needs.✍

### **For More Information**

The Office of the Insurance Commissioner in Washington state published a handout called *Tips for SHIBA Volunteers Who Work from Home and Phone Counsel Clients*. It is an excellent overview for anyone working from home and counseling clients and covers a range of important points. The handout is found in the resource libraries of both the SHIP and SMP centers.