# Business Mastery

*§2 Intentional Excellence*

## *Therapeutic Communications*

—

**By Cherie M. Sohnen-Moe**

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# Therapeutic Communications

## Communication Fundamentals

- First Impressions
- Building Rapport
- Keys to Excellent Communication

## Listening Skills

- Active Listening
- Reflective Feedback
- Body Language

## Communication Barriers

- Upset Clients and Difficult Situations
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- Declining a Potential New Client
- Dismissing a Current Client

# KEY

## *Terms*

- ❑ Active Listening
- ❑ Body Language
- ❑ Client Compliance
- ❑ Client Education
- ❑ Client Interview
- ❑ Closed-ended Questions
- ❑ Closure Stage
- ❑ Communication
- ❑ Contraindications
- ❑ Countertransference
- ❑ Demeanor
- ❑ Dissonance
- ❑ Documentation
- ❑ Empathy
- ❑ Etiquette

# KEY

## *Terms*

- Exploration Stage
- Exit Interview
- Feedback
- HIPAA
- Indications
- Informed Consent
- Initiation Stage
- Insurance Reimbursement
- Intake Form
- Intake Interview
- Listening
- Malpractice
- Malpractice Insurance
- Noise



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# KEY

## *Terms*

- ❑ Non-verbal Cues
- ❑ Open-ended Question
- ❑ Planning Stage
- ❑ Policy
- ❑ Presence
- ❑ Protocol
- ❑ Rapport
- ❑ Recordkeeping
- ❑ Referral
- ❑ Reflective Feedback
- ❑ SOAP Charting
- ❑ Therapeutic Relationship
- ❑ Transference
- ❑ Trauma
- ❑ Treatment Plan

# KEY

## *Terms*

- Trigger
- Wellness Notes

# Good Communication

*Good communication is the foundation of healthy relationships and thriving practices. In fact, one of the common threads of highly successful practitioners is effective communication skills.*

- Without good communication skills, the growth of your business is likely to lag.

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# Communication Fundamentals

- Called “people skills” because involves connecting with people in positive and productive ways.
- A two-way process that involves an exchange of ideas, emotions, and attitude.
- Ultimate goal of communication is to elicit some type of action.

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# Communication Fundamentals

- Cornerstones of communication include:
  - **First Impressions:** Powerful (often irreversible) interactions in first 4-20 seconds based on appearance, facial expressions, body language, what you say, what's not said, your ability to gain rapport, your energy level, and the actual message.
  - **Building Rapport:** The bond between you and clients
  - **Awareness of others' needs:** Key for excellent communication skills

# Tips on How NOT to Create Rapport

- Arrive late.
- Use invalidating language.
- Don't give the client your full attention.
- Eat or chew gum.
- Avoid eye contact.
- Talk about yourself a lot.
- Gossip.
- Be messy.
- Disregard ambient noise.
- Shame clients into coming back.
- Give unsolicited advice.
- Act like you know what's best.
- Be judgmental.

Figure 6.1, *page 91*

# 10 Keys for Excellent Communication

1. Understand the other person's needs.
2. Take into consideration natural tendencies and capacities.
3. Be considerate
4. Communicate on an equal  level.
5. Be honest.
6. Know the other person's opinion of you.
7. Have good timing.
8. Separate your emotions from the facts.
9. Ask questions.
10. Listen. Listen. Listen.

Figure 6.2, *page 92*

# Listening Skills

- Effective ways to listen are important because most communication time is spent listening.
  - **Active Listening:** Giving full attention to the speaker by conveying interest with nonverbal communication
  - **Reflective Feedback:** One of the most effective techniques for enhancing communication involving briefly restating the feelings, concerns, or content of what the speaker has said
  - **Body Language:** Important for touch practitioners to attend non-verbal cues from clients



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# *Tips for Active Listening*

- Maintain steady eye contact.
- Hold your body in an open position: face the speaker and lean slightly into the conversation.
- Be active: nod your head, nonverbally acknowledge what is being said.
- Use body language and tone to reflect the intent of what's being said.
- Ask questions to clarify or get more information when necessary.
- Pay attention to what is being said as well as what isn't being said.
- Check in with the speaker about nonverbal cues.
- Avoid distractions: turn off phone, place "Do Not Disturb" or "Session in Progress" sign on the door.

Figure 6.3, *page 93*

# *Tips for Reflective Feedback*

- Be aware that reflective feedback requires total presence: people see, hear, and feel when you're paying attention to what they say.
- Paraphrase instead of repeating what you heard word for word; only reflect back what is essential.
- Set aside your own feelings and opinions.
- Validate the speaker's feelings and experiences, regardless of whether you agree with him.
- Avoid comments that express judgment.
- Use a question format to reflect back the essence of a person's concern.
- Give ample time for the speaker to complete her thoughts; don't interrupt.

Figure 6.4, *page 94*

# Tips for Responding to Nonverbal Cues

- Use direct observations like, "I noticed you were holding your breath when I pressed down on your shoulder."
- Use third-person statements when addressing sensitive boundary issues. For example, "Some clients disrobe completely, while others choose to leave on certain items, like underwear."
- Explain choices or alternatives. As in the above example, you might add, "Either way is fine. I can work on any area through your clothes, or avoid certain areas altogether. The choice is yours."
- Express openness to client input, "Please let me know if anything changes throughout your treatment, if you would like an area worked or avoided, or if there is anything else I can do to help you be more comfortable."

Figure 6.5, *page 94*



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# Communication Barriers

- Each of us projects our own meanings onto the words we say and hear
- Communication can also break down at the listener's end.
- May need to cope with:
  - Upset clients and difficult situations
  - **Emotional Triggers:** Hands-on bodywork can sometimes elicit emotional reactions

# *Tips for Effective Communication in Difficult Situations*

- Carefully listen to the person’s concern and the emotion behind the words.
- Avoid reacting by venting back at the person with anger or frustration of your own. Though it may be difficult, do everything you can to hold your tongue. Focus on staying centered.
- Acknowledge and reflect the person’s concern and feelings. For example, “It sounds like you’re really frustrated right now. If I understand correctly….”
- Don’t pacify. Don’t over-apologize. Upset people respond much better to a genuine apology that comes from strength not weakness.
- Focus on core issues and solutions. Don’t get sidetracked by unimportant details

Figure 6.6, *page 96*



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# Documenting Client Sessions

- Documentation of client sessions—also known as **charting**—is a vital activity in all wellness practices
- Client files serve as business records, help track progress and clients' needs, and are necessary for insurance reimbursement
- Client file and charting procedures vary depending upon the working environment

# Basic Charting Tips

- Review a client's file immediately before you meet with him. This helps refresh your memory and focus on the client's unique needs.
- Make concise and complete notes after each session. Include anything unexpected that may have happened, techniques you want to focus on next time, client education activities, and any other pertinent information.
- Be cautious of labeling or diagnosing clients in a manner that could reflect negatively upon them.
- Pay close attention to confidentiality. Although files need to contain accurate and thorough information, session records should only include information directly related to sessions.

Figure 6.7, *page 98*

# *Basic Charting Tips* (cont.)

- Focus on facts; avoid analysis or judgments.
- Avoid using abbreviations or symbols not specifically defined by your employer, group practice, or standard industry practices.
- In some medical and healthcare environments you may need to chart electronically. In these cases, it may be helpful to brush up on your technology skills to maintain a high level of productivity in charting.
- Don't change or delete information once it's in a chart. If you realize an error was made, attach an addendum to the document or note the error (perhaps draw a thin line through it), initial it, and date it.

Figure 6.7, *page 98*

# Documenting Client Sessions

- **Client Forms**: While there are varied client forms depending on the work being done and if it is covered by insurance, every client should fill out:
  - **Intake Form:** Include client's name; address; phone numbers; email address; medical history; chief complaints; current medication; and reason(s) for using your services.
  - **Health Information Form**
  - **Client Policy Form**
  - **Informed Consent Form**

# Documenting Client Sessions *(cont.)*

- **Session Forms**: 2 primary standardized formats for documenting what occurred in session:
  - **SOAP Notes:** (Subjective, Objective, Assessment, Plan); now easier than ever with online programs to chart with a tablet or smartphone
  - **Wellness Note:** For modalities or spa-type settings that don't lend themselves well to the healthcare model with a focus on treatment goals.

# *Client Session SOAP Chart*

PROVIDER NAME PROVIDER NO.

**SOAP CHART - F**

NAME ______ DATE ______

DATE OF INJURY ______ INSURANCE ID# ______

DATE ______ CURRENT MEDS ______

**S** FOCUS FOR TODAY

SYMPTOMS: LOCATION, INTENSITY, FREQUENCY, DURATION, ONSET

ACTIVITIES OF DAILY LIVING (ADL's): AGGRAVATING, RELIEVING

**O** FINDINGS: VISUAL, PALPABLE, TEST RESULTS

MODALITIES: APPLICATIONS, LOCATIONS

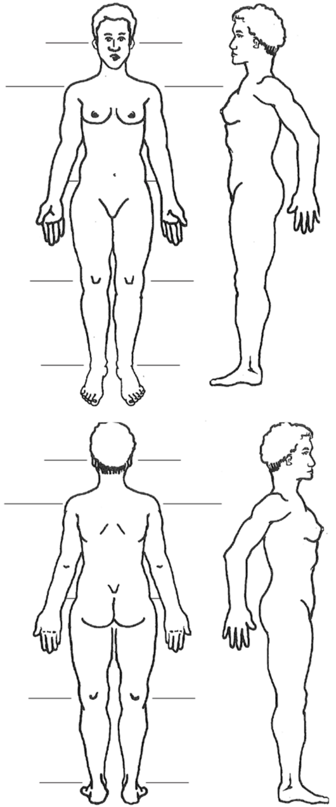
RESPONSE TO TREATMENT (SEE Δ )

**A** FUNCTIONAL LIMITATIONS: PRIORITIZE, ENVIRONMENT, PRIOR ABILITY

GOALS: LONG-TERM, SHORT-TERM

**P** FUTURE TREATMENT, FREQUENCY

HOMEWORK, SELF-CARE



PROVIDER SIGNATURE ______ DATE ______

TP-TRIGGER POINT · P-PAIN · HT-HYPERTONICITY · Adh-ADHESION · rot-ROTATION · SHORT

TeP-TENDER POINT · Infl-INFLAMATION · Sp-SPASM · Numb-NUMBNESS · elev-ELEVATION · LONG



Figure 6.8, *page 100*

# Client Interviews

*Interviews play a key role in creating lasting, healthy relationships between practitioners and client*

- Information is gathered, rapport is built, trust is developed, and ideas are shared
- An effective intake interview can take from 20 to 60 min.
  - ✓ Requires good communication skills, especially listening.
- Opportunity to attain client history, explain procedures, clarify boundaries, determine the course of treatment, educate clients, and build trust by listening.

# Sample Interview Checklist

- ❑ *Review File*
- ❑ *Greet Client*
- ❑ *Give Client a Tour of the Premises*
- ❑ *Fill Out Intake Forms*
- ❑ *Review Policies*
- ❑ *Discuss Overall Goals*
- ❑ *Preview Session Procedure*
- ❑ *Perform Assessment*
- ❑ *Provide Treatment*
- ❑ *Develop a Treatment Plan*
- ❑ *Summarize Session*
- ❑ *Assign Homework*
- ❑ *Suggest Referrals*
- ❑ *Make Product Recommendations*
- ❑ *Schedule Next Session*

Figure 6.9, *page 101*

# *Tips for Keeping the Interview on Track*

- Inform your clients about what they can expect to experience on their first visit.
  - ✓ For instance, "Today we're going to go over your health history questionnaire and identify your concerns. I'm gathering all of this information to get a clear picture of your specific needs. All of this is important for me to create the best possible course for you."
- Explain how you plan to allot time.
  - ✓ For instance, "We will spend about 20 minutes discussing concerns and health history, and the treatment on the first visit will be 45 minutes. After that, sessions will usually last 50 minutes."

Figure 6.10, *page 101*

# *Tips for Keeping the Interview on Track*

(cont.)

- If a client starts to ramble, kindly redirect him to the topic at hand and assure him you want to allow as much time as possible for his session.
- In a spa setting, it can be challenging to complete a thorough intake interview in the time allotted. Key questions to ask include: Any major health challenges or accidents in the last 6 months? Are you currently under medical care or taking medication for any condition? How is your body feeling today? Any specific areas of focus or concern?
  - ✓ Keep in mind: you can get more information on preferences as you're working.

Figure 6.10, *page 101*

# Client Interviews *(cont.)*

- **Timing:** Allow clients ample time to complete forms and ask questions.
- **Artful Phrasing:** Open-ended questions facilitate therapeutic communication by encouraging clients to express thoughts and feelings.
  - Usually begin with ***how, what, when,*** or ***could***
  - A common intake interview question is if the client has experienced this type of treatment

✓ Use clear, simple language; avoid medical jargon/technical terms.

# Open- and Closed-Ended Questions

| Open-Ended Questions | Closed-Ended Questions |
|---|---|
| ❑ How do you react to stress? | ❑ Do you experience a lot of stress? |
| ❑ What types of wellness activities and treatments have you done? | ❑ Have you ever experienced this type of treatment before? |
| ❑ What would you like me to focus on in this session? | ❑ Shall we focus on your headaches today? |
| ❑ How are you feeling today? | ❑ Are you feeling better today? |
| ❑ What are your concerns? | ❑ Do you have any concerns? |
| ❑ What products would you like to take home today? | ❑ Would you like to take home any products today? |

Figure 6.11, *page 102*



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# Client Interview Questions

- How are you feeling today?
- Tell me about your physical or emotional condition.
- How long have you been experiencing this condition?
- When was the onset of this condition?
- What is the intensity and frequency of this condition?
- What causes you stress?
- What activities aggravate this condition?
- What actions relieve or reduce the discomfort of this condition?
- What are your long-term wellness goals?

Figure 6.12, *page 103*

# *Client Interview Questions* (cont.)

- What do you want to achieve in today's session?
- What kind of mobility assistance might you need from me?
- What is your experience with [your profession here]? What were the results (if applicable)?
- Are you currently under medical or therapeutic treatment? If so, for what condition and what medications or supplements are you taking?
- What products have you used to address this condition?
- What questions and concerns do you have about my services?
- What are your expectations about my profession or me?
- What can I do to make this session effective and enjoyable?

Figure 6.12, *page 103*

# Client Interviews *(cont.)*

- **Interview Stages:** Client interviews consist of four major stages—initiation, exploration, planning, and closure.
  - **Initiation:** Introduce yourself, establish rapport, discuss the client's general issues and expectations, describe what you can do, review your policies, and explain procedures.
  - **Exploration:** Review client's history, perform physical assessment, determine the treatment course for session
  - **Planning:** Long-range treatment plans are the key to having clients who receive treatments on a regular basis
  - **Closure:** Referred to as the "exit interview."

# Top 10 Essential Interview Elements

1. Actively listen.
2. Reflect what you've heard.
3. Ask for clarification.
4. Take notes.
5. Make assessments.
6. Describe your treatments.
7. Answer questions.
8. Obtain client consent.
9. Engage client in planning.
10. Plan treatment(s)

Figure 6.13, *page 103*

# Client Interviews *(cont.)*

- **Client Compliance:** If clients don't do homework, make lifestyle changes, use appropriate products, or follow-up:
  - Recognize factors preventing full compliance: lack of discipline, time restraints, insufficient funds/insurance coverage, social pressures, beliefs, and other obligations.
  - Explain why it's their best interest to adhere to your recommendations, clarify instructions, and discuss how to overcome barriers.
  - Have clients repeat instructions or perform exercises or stretches.
  - Give them printed reference material to take home. The most critical aspect is gaining your clients' concordance about their treatment plans and assignments.

# Client Interviews *(cont.)*

- **Client Education:** Occurs in 2 ways:
  - Supporting the body's learning of how to optimally respond to states of relaxation and repair
  - Increase your clients' general awareness of body function and self-care
- **Hone Your Interviewing Skills:** The best way to sharpen your skills in this area is to role-play several intake interviews.

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# The Client Technology Connection

- **Machines vs. Humans:** Most prefer talking to another human being with their questions, particularly if they aren't current clients.
- **Phone Etiquette:** Every time you answer the telephone, you create an impression. The question remains what that impression will be.

Image Courtesy of GraphicStock



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# *Telephone Tips*

- *Be prepared*
- *Inspire interest*
- *Answer promptly*
- *Be courteous and smile*
- *Identify yourself and offer to be of service*
- *Speak clearly*
- *Avoid distractors*
- *Avoid putting people on hold*
- *Take notes and follow through*
- *Focus on service*

Figure 6.14, *page 109*

# The Client Technology Connection *(cont.)*

- **Email and Text Etiquette :** Clients often find it convenient to use email or texting for questions and appointment requests. Unfortunately, this can complicate communications because a large percentage of communication impact is nonverbal.
  - Before you choose to send an email, ask yourself: “Is email appropriate for this correspondence?”
- **Screening Clients:** Conduct a preliminary interview to find out the reason for calling and the expectations.
  - If someone else answers your phone, consider developing scripts.

# The Client Technology Connection *(cont.)*

- **Inappropriate Calls:** Receiving inappropriate calls can be a source of immense discomfort.
- Unfortunately, many practitioners—particularly massage therapists—still get calls from people who are ill-informed about the nature and scope of wellness services
  - If people want sexual services, tell them that isn't what you do, give a brief description of the services you do provide, and let them know that a legitimate practitioner does not perform that kind of work.

# Declining and Dismissing Clients

- **Declining a Potential New Client:** If your appointment book is filled with established clients, make sure you have a list of practitioners ready for referrals.
  - If after conducting a preliminary interview, you determine a client has needs beyond your specialty or scope of practice, refer to a specialist or their primary care practitioner for further evaluation.
- **Dismissing a Current Client:** If after a course of treatments, you determine the client is not benefiting, you may decide to end the therapeutic relationship and offer a referral elsewhere.

# *Declining and Dismissing Clients*

## Reasons to Decline a New Client

- ❑ ***Practice is Full***
- ❑ ***Inability to Help***
- ❑ ***Countertransference***

## Reasons to Dismiss a Current Client

- ❑ ***Discomfort***
- ❑ ***Lack of Results***
- ❑ ***Transference/ Countertransference***
- ❑ ***Completion***

Figure 6.14, *page 112*

# Highlights

Therapeutic communication skills are the foundation of a thriving practice and strong client relationships.

Building rapport can be the single most important factor in whether a client sees you once or becomes a long-term client.

You can learn to skillfully handle difficult situations and upset clients by learning and practicing communication techniques such as active listening and reflective feedback.

# Highlights *(cont.)*

Active listening requires giving full attention to a speaker and a willingness to set aside your wandering thoughts. It’s a powerful way to help clients feel relaxed and at ease.

Reflective feedback involves asking questions to further mutual understanding and paraphrasing the kernel of meaning expressed by a speaker; it validates the speaker’s feelings and experiences.

Non-verbal cues are often the only signal given by clients that something else is needed.

# Highlights *(cont.)*

When you encounter an upset client, your optimal goal is to ensure that she feels her concerns have been truly heard and addressed in an appropriate manner.

Changing the focus of a session can help diffuse emotional reactions when triggered by bodywork.

An effective intake interview can take from 20 to 60 minutes; listen carefully to a client’s concerns and questions to help to build a climate of trust.

# Highlights *(cont.)*

To help first-time clients feel at ease, inform them about what to expect during their intake interview and treatment session.

To enhance your client interview skills, practice artful phrasing and ask open-ended questions to draw out useful information about a client's condition or concern.

One of the most commonly used charting formats is SOAP (Subjective, Objective, Assessment, Plan).

# Highlights *(cont.)*

Charting is a vital activity to ensure accurate recordkeeping, optimal treatment planning, efficient insurance processing, and continuity of communication among practitioners.

Next to your hands, your telephone can be the most important tool in your business. Use good phone etiquette, effective client screening, and the right technology to ensure the best results for your business.

# Highlights *(cont.)*

Declining a potential new client is appropriate when the client's needs are beyond your scope of practice or you don't feel you could give the client clear, caring, compassionate attention.

If you determine the treatments your client is receiving have not moved her toward her wellness goal, you may need to dismiss your client and refer her elsewhere for continued treatment.