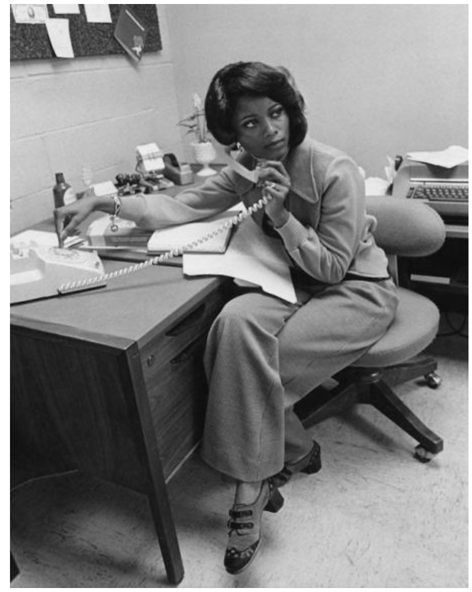
The Art of the First Client Contact: 10 Tasks

By Barbara Griswold, LMFT



Since the start of the pandemic, many therapists have seen a surge of potential new clients in need of support. And with the shift to telehealth, the onboarding of new clients has become more complicated since many tasks now need to be handled at a distance.

Your first contact with any client is part skill, part art, and all about balance. You need to allow the client to tell their story, showing the empathy that will sow the seeds of connection and rapport. This starts a good clinical relationship, and at the same time increases the chance the client will show up at the first session. However, you may not want to do a full-blown therapy session on the phone. Plus, you need to quickly accomplish tasks related to clinical screening and finances.

Here are **10 Tasks of the First Call**, with some sample phrases:

1) JOIN. Sound warm and upbeat. Give hope and praise.

- *"I know it isn't easy to make the first call and reach out for help. I'm so glad you called me."*
- *"Have you been searching a long time for a therapist? I'm sorry. It shouldn't be so hard to find a therapist. I really admire your persistence."*

2) BRIEF SCREENING: Are the client's issues in the scope of your competence?

- *"Before we set up the appointment, it would help to know a little about the issues you are dealing with, so I can get a sense if I might be a good fit for you. In a few sentences, can you give me an idea of what is going on that has made you decide to get counseling right now?"*
- *After client tells story and you ask follow up questions: "I'm sure you've just told me a small portion of the story, but already I can hear you've really been through a lot, and that you are dealing with a lot of stressful things. I'm so glad you reached out — there is no reason you have to go through this alone."*
- *"From what you've told me so far, your issues are ones with which I have a lot of experience, that I help clients with every day. So, I'd be happy to set up an appointment for us to meet and see if it feels like a good fit."*

3) THEIR QUESTIONS.

- *"Did you have any questions for me?" "Oh, yes, that's a great question…"* In my experience, individual clients most often ask about my therapy approach, while couples most often ask what my success rate is at saving relationships. Practice some answers for these questions, using non-technical language.

4) FEES/INSURANCE. Fees must be clear before the client walks in the door.

- "*So, before we pull out our calendars, let's get boring business stuff out of the way. The charge for the first session is $___ and then after that for a ___ minute session is $___. Do you have insurance that might help cover this, or will you be paying yourself?"*
- **<u>If you are not a provider for their insurance plan, or they don't have insurance, and the client indicates they can't afford your full fee</u>:** *Say, "I understand. How much do you feel you could afford?" then negotiate an affordable fee or refer them elsewhere. You may also say, "while I'm not a provider on your insurance plan, many PPO or POS plans will give some*

reimbursement when you see any licensed provider. Or might you have a FSA, MSA, or HSA plan at your work that would help pay for your expenses?" At this point, if you really want to land this new client, you can offer to check coverage for them. Or you could say, "*you may want to call your insurance and check your out-of-network reimbursement benefit for telehealth/in-person sessions. You would pay in full at the session, and I would give you an invoice to submit to your plan for reimbursement."*

- **<u>If you are a network provider for their insurance</u>**: *"Well, good news! I am a participating provider for your insurance, so I will take care of the billing for you, and you may only have to pay a copayment. I'll need to call your insurance before we meet to check your coverage."*

5) AVAILABILITY:

- *"Let's look at scheduling. I have these openings…"*

6) WHERE YOU'LL MEET

- *If in-person: "My office is located at ________. Do you need directions?"*
- If telehealth: Give client the video link or tell how they will get it.

7) CANCELLATION INSTRUCTIONS

- *"Great! Now, if you do need to cancel, please e-mail me/call me with as much notice as possible. My cancellation policy is ___________. Also, please give me your e-mail/phone number where you'll be on that day in case I need to cancel."*

8) INSURANCE INFO (IF APPLICABLE):

- *"So, before we hang up, why don't you get your insurance card, so I can check your insurance before our first session?"* (You can also have the client send a picture or copy of the front and back of their card via secure email). Note: In my book and Practice Forms Packet, available at www.theinsurancemaze.com/store, I have a "Checking Coverage: Essential Questions" handout which gives you the questions to ask the plan when you call.

9) CONFIRMATION AND FINAL INSTRUCTIONS:

- *"OK, so let's confirm: Our appointment is on _______ date and ________ time."*
- *"I'll be sending you some forms to fill out [say how you'll send]. It is really important that you complete and return them before the session."*

10) CLOSING:

- *"Any final questions?"*
- *"It's been so nice talking to you, and I'm so glad you called for support. I'm looking forward to meeting you and to working together."*

One final recommendation: Even if you make first contact by email, talking to the clients on the phone before they come in may be a good idea. In addition to helping you screen a client's appropriateness for your practice, this direct connection will decrease the chance of a no-show.

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