FIRST LINE
EDUCATION INC.

Research Based
Practically Balanced

Great Client Interviews

You got a new referral. Now what?

Making a good first impression - from that first phone call or email with a potential client - can make the difference between one visit, and well, twenty!

There are many tips and tricks you can use to help your new referrals feel comfortable and welcome before you even meet them.

Having a framework to follow for initial contact, follow up, booking next sessions, and asking for feedback is really important. We'll show you how easy it can be.

We'll also teach you how to conduct a great client interview. It's sometimes tricky to get all the information from your client that you need, stay in control of your meeting, and make sure you don't run right over your time limit.

We've got suggestions and scripts you can try out that make this pretty simple (with a bit of practice of course!).

You'll also see just how much information you can get by careful observation of your client - before they even sit down in your office - or you sit down at their dining room table 😁

Watching how they move and listening carefully to the words they use as you work through your list of questions can give you a LOT of insight - and much material for counselling down the road.

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Join us for a day and we'll show you the ropes - you'll see just how fascinating client interviews can be!

Here's What You'll Learn

Module 1

- How to respond to a referral source when you get a new referral
- The best ways to reach out to a potential new client for the first time
- What to say in that first contact phone call or email
- How to present options for appointment times and locations
- What to discuss by phone and/or email prior to the first appointment and what should be left until your meeting

Module 2

- How to arrange and send the initial history documents so your new referral can prepare for your first meeting
- How to structure that first 60 to 90 minutes with the new referral
- How to answer personal questions (believe us - you'll get them!)
- When and how to redirect meetings if they get off track

Module 3

- How to ensure you are listening to your new referral closely and check that you are recording important information
- What information, observation and data collection should be done in the first meeting and what can be left until a future session
- What to say when clients discuss difficult topics or become emotional during your session

Module 4

- How to determine if this new referral would be a good fit for your practice - because you don't have to accept all new referrals!
- How to bring your meeting to a close gracefully even if things don't look to be wrapping up any time soon!
- The best way to finish a meeting and make plans for a follow up session (or four!)
- How to schedule your client into your calendar to leave time for research and preparation for the next session
- Wrapping up your session, summarizing your findings, and making plans for your next session together
- Making sure your client was happy with your meeting - and is excited to see you again!