

INTERVIEWING OVER THE PHONE



tips +
resources
for doing
phone
assessments



SET A SCHEDULE...

Just like working with clients face-to-face, we need to have set schedules for calls, where possible.

It can be easy to go from call to call, but remember to take breaks, take the time you need between calls for paperwork to avoid getting overwhelmed!

Let someone know you can call them back if needed--it's just like waiting in the foyer for a free CSW.

Give people a reasonable timeline for their wait and keep to it... everyone knows that a long hold or a long wait for a call is really frustrating.



USE WHAT YOU ALREADY KNOW

A lot of face-to-face techniques can be used over the phone, so use what you're already good at! Be patient, allow for silences, and try not to get frustrated with background distractions (like noise or static).

Find a quiet place that is free of distractions so the client can have your full attention.

This is the best time to be patient and flexible for people who are inevitably in distress.

Remember your skills because all those interview techniques are just as important--if not more so--over the phone as in person.



HOW TO BE HOLISTIC?

It's very different providing support over the phone, we rely a lot on other ways of observing people, so remember that no phone call will be perfect.

Remind yourself that your assessment will be limited and that losing our other four senses during these conversations means we lose a lot. Long pause on the phone? Is the person listening intently, thinking, or distracted? Work with the most tangible things you have and make sure that your notes help reflect only what you *know*. This would also be a good time to explore potential referrals in your area, since good referrals are at the heart of a holistic assessment.



WHAT ABOUT DISTRACTIONS?

Do your best to avoid distractions at all cost. It's no fun to listen to someone doing something else while you're on the phone.

If a distraction is unavoidable, apologise to the client and let them know what's happening (e.g. "sorry, I'll be with you in a minute").

It helps to let the client know that you're working from home in case they hear any background noise but that you've made sure that your space is free of distractions (and is wholly confidential).



INTERVIEWING OVER THE PHONE



tips +
resources
for doing
phone
assessments



USE THE BENEFITS TO YOUR ADVANTAGE

Phone interviews give us the opportunity to reach the most vulnerable people where they are! Working from home or conducting phone interviews from the office also means that you have the opportunity to prepare yourself in your own time--if the client isn't new, access the online database to better understand the client's situation and reasons for accessing support in the past.



HOW ABOUT CONFIDENTIALITY?

Remember that you can't see your client and don't know where they are. Make sure they are in a safe place during the call which allows them to have a confidential conversation with you. Make sure also that your work space also allows you to have confidential conversations, and alert the client to this at the start of the call. Can the other members of your household hear your call? Can the client hear your partner, young child, or dog on the other end of the line? Find yourself the quietest and most separate space you can when making these calls. Have a chat about it with your client and make sure they are somewhere good too.



INTERVIEW CHECKLIST

- **Establish rapport** - this might be a bit harder over the phone, but remember that you're there to provide support.
- **Engage the person who has the problem** - not just the *problem* that the person is having.
- **Attend to and contain the caller's feelings and distress** - again, a lot of these clients are going to be new. Help them **contain their anxiety** by taking the time to be extra empathetic.
- **Avoid premature problem solving and advice giving** - get people the help they need, but make sure you're doing so by *listening* to them and making sure they feel heard.



NEED HELP?

Ask questions.

Here is a good resource for interviews over the phone: www.secasa.com.au/pages/telephone-consulting/

You can also reach out to someone in your agency, or email questions to meagan@cisvic.org.au or Jill@cisvic.org.au

We are all in this together!

