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Mastering Difficult Client Conversations

Team Meeting Facilitator Guide

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In the final module of this course, *Present to Your Team,* a staff video has been provided to play during a staff meeting. This video will equip you and your team with tools to become more confident when handling difficult client conversations. This *Team Meeting Facilitator Guide* shares the steps you need to take before, during, and after this meeting to facilitate it effectively.

Below is an outline of the content you'll find in this guide.

Before the Meeting

1. **Understand your role as the facilitator.** As the facilitator, your job is to help your employees figure out the answers rather than giving them the answers. To do this, follow the tips below.

    - Keep the conversation on track. If the conversation gets off topic, get back on track by saying things like:

        - That's a good point. Can you elaborate?
        - Tell me more about your thoughts on that.
        - What are some other thoughts on this question?
        - I know we want to quickly solve issues sometimes. I do too. But let's explore these questions fully before we try to fix things so we're working on the right things together and everyone is involved.

    - Talk less and listen more. The less you talk, the more people will engage and share.

    - Manage participation. In order to get the most out of this meeting, everyone has to participate in the activities. This means you may need to draw quieter employees out and make sure talkative employees are not the only ones contributing. It may also be helpful to go around and give each person a few seconds to share their view.

    - Provide clarity when needed. Use this facilitator guide to help lead the activities and answer questions throughout the staff meeting.

2. **Pick a time and place for your meeting.** Choose a meeting space that is large enough to fit all of your employees and has technology capabilities to show the staff video. Also, be sure you've set aside at least two hours for the meeting.

3. **Invite your employees to the meeting.** Invite employees by sending an email and posting the invitation in a common area (breakroom, refrigerator, etc.). You can use the sample email below or create your own.

> You are invited to attend an all-staff meeting on ***[Month, Day, Year]*** from ***[Time-Time].*** The goal of this meeting is to equip you with a process to more successfully handle difficult client conversations. Following the meeting, you will feel more comfortable and confident when faced with challenging client interactions.
>
> In order for this meeting to be successful, it is important for all team members to be present, engaged, and prepared. To prepare for the meeting, think about the following questions:
> - What are the greatest challenges you face when talking with clients?
> - What are you hoping to learn about dealing with difficult client conversations during this meeting?
>
> Please bring a pen and paper to take notes and be prepared to participate in interactive discussions.

4. **Prepare yourself for the meeting.** It is recommended that you watch the final module of this course prior to facilitating the meeting. This module contains the staff video and outlines the steps and activities that your team will complete. Watching the video ahead of time will help you become familiar with and prepared for the individual and group activities. In addition, spend time thinking about the questions below.

    - How will I define success for this meeting?
    - What do I want the staff to learn during this meeting?
    - What should be different when this meeting is over? If I were looking for small incremental progress, what would I like to see happening in our practice over the next several days or weeks?
    - What do I need to do as a leader to make sure this meeting is successful?

5. **Prepare the meeting space.** Prior to beginning the meeting:

    - Test all technology to ensure that the video plays correctly.
    - Make sure that you have access to a whiteboard or adhesive flipchart paper for recording notes during the meeting.
    - Print a copy of the *Staff Video Course Guide* for each employee.

During the Meeting

1. **Welcome employees**. When your employees arrive, open by thanking everyone for attending and share what you hope to accomplish. Share your desire to improve the practice and tell them you've found some outside resources that will help you do this together.

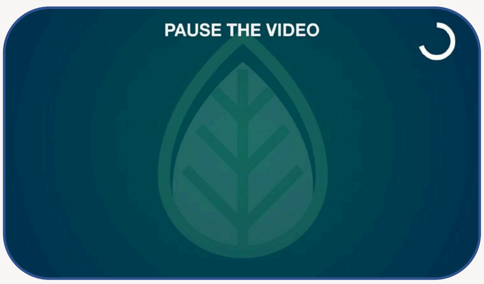
2. **Begin the staff video**. Begin the staff video in the final module and follow it as you work through the rest of your meeting. Be prepared to stop, discuss, and complete activities throughout the video. Unlike the manager videos, the staff video is not broken up into separate modules. Instead, it plays continuously from start to finish. However, there are visual transitions indicating when the video is moving from one topic to the next.

   On pages 6-20, you'll find an overview of each activity, instructions for facilitating them, and possible answers when applicable.

ACTIVITY 1

Individual Activity with Discussion

During this section of the video, participants will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to independently answer the question below. Be prepared to share your answers.

- *What are you hoping to learn about difficult client conversations during today's meeting?*

When you see this, pause the video and ask your employees to consider the question on the screen. The purpose of this activity is let your employees create goals for this meeting. There are no right or wrong answers to this question; it is simply meant to help your employees begin to invest in personal growth during this meeting.

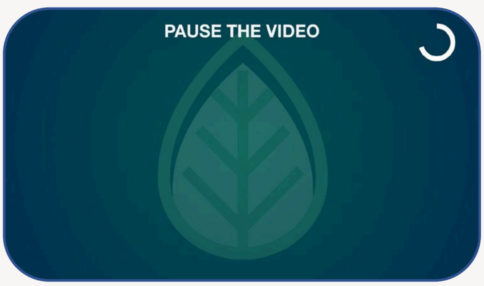
After employees have time to answer independently, ask for volunteers to share with the group. As people share, capture their responses on a flipchart or whiteboard by recording key points.

When you're finished, keep these goals visible so you can revisit them throughout the meeting.

ACTIVITY 2

Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to answer the questions below as a group.

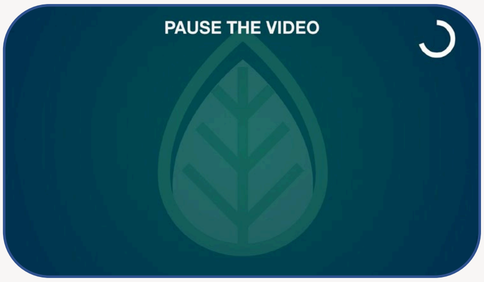
- *What are your reactions to how different approaches during challenging client conversations can affect your practice?*
- *Are there any other effects that were not mentioned in the video?*

When you see this, pause the video and ask your employees to discuss the questions on the screen as a group. They can record notes or thoughts on page 4 of the *Staff Video Course Guide.* The purpose of this activity is to help employees understand the impact their interactions have on themselves, their team, their clients, and the practice.

ACTIVITY 3

Individual Activity

During this section of the video, you will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to independently answer the questions below.

Successful client conversations require preparation. Taking time to complete your "pregame" can help you see the issue from your client's point of view and reframe any assumptions that you may have.

Reflect on your thoughts and assumptions about your clients. How can they be reframed to be more understanding or compassionate towards clients?

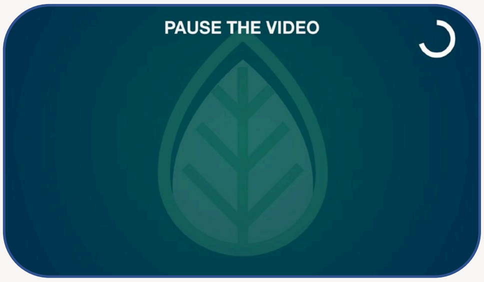
When you see this, pause the video and ask your employees to complete the activity on the screen by themselves. They can record their answers on page 5 of the *Staff Video Course Guide.*

Employees will not be asked to share their answers with the group, however, emphasize that this is an opportunity for reflection.

ACTIVITY 4

Individual Activity

During this section of the video, you will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to independently answer the questions below.

Think about a time when you had an emotional reaction. What emotional or physiological responses did you have? How long did it take for you to calm down?

When you see this, pause the video and ask your employees to complete the activity on the screen by themselves. They can record their answers on page 6 of the *Staff Video Course Guide.*

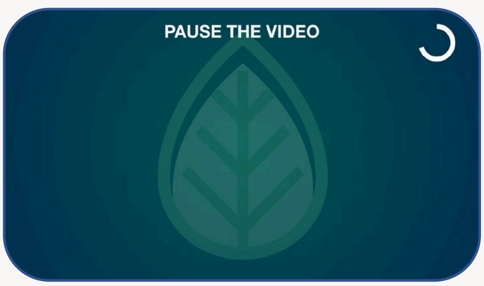
If time allows, ask if there are any volunteers that would like to share their answers. Although employees are not required to share their answers, this is a good peer-to-peer learning opportunity.

If you do not have time for sharing, emphasize that these questions offer an excellent opportunity for reflection.

ACTIVITY 5

Paired Activity

During this section of the video, you will be prompted to complete an activity with a partner by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to discuss the questions below with a partner.

Have you ever used listening questions with a client? What was the result?

When you see this, pause the video and ask your employees to work with a partner sitting next to them. If you have an odd number of employees, you can partner with an employee or create a group of three.

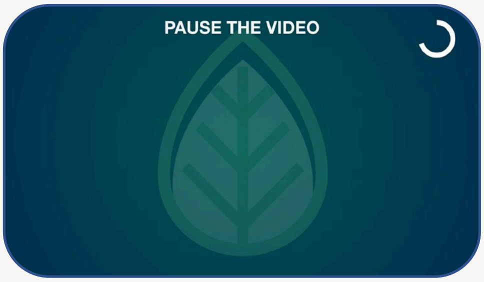
Employees can record notes or thoughts on page 7 of the *Staff Video Course Guide.*

This activity will give employees a chance to share experiences and learn new questions and strategies from their peers.

ACTIVITY 6

Individual Activity

During this section of the video, you will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to independently answer the questions below.

Do you think clients consistently view you as a partner? Why or why not?

What can you do to be seen as a better partner?

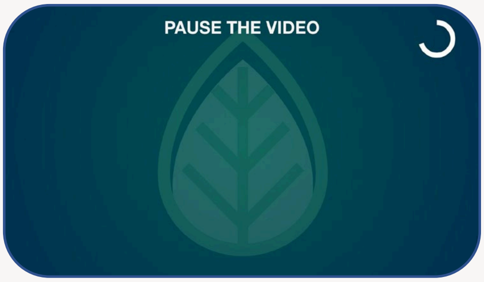
When you see this, pause the video and ask your employees to complete the activity on the screen by themselves. They can record their answers on page 8 of the *Staff Video Course Guide.*

Employees will not be asked to share their answers with the group, however emphasize that this is an opportunity for reflection

ACTIVITY 7

Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to answer the question below as a group.

When you've interacted with an upset or frustrated client, what signs have you noticed that let you know they are ready to move forward with a solution?

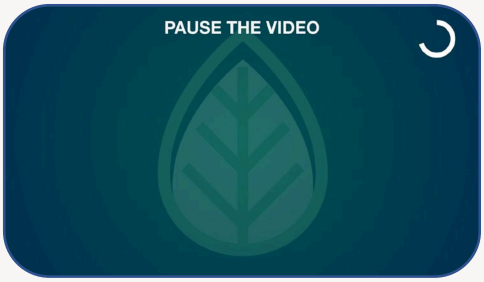
When you see this, pause the video and ask your employees to follow the instructions on the screen. They can record notes or thoughts on page 9 of the *Staff Video Course Guide.*

During this discussion, encourage all employees to participate. You may need to manage participation by helping quieter employees to share and ensure that more talkative employees do not overpower the conversation.

ACTIVITY 8

Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to answer the questions below as a group.

Have you ever dealt with a situation that needed an informational or transactional solution? What happened and how did you handle it?

Would you handle the situation the same way now, or would you handle it differently?

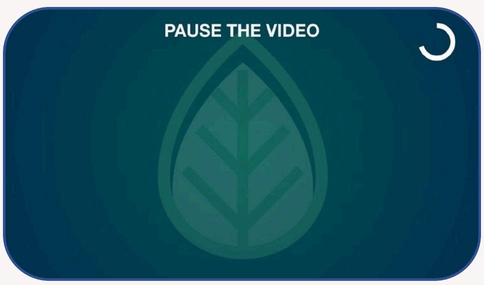
When you see this, pause the video and ask your employees to follow the instructions on the screen. They can record notes or thoughts on page 10 of the *Staff Video Course Guide.*

During this discussion, encourage all employees to participate. You may need to manage participation by helping quieter employees to share and ensure that more talkative employees do not overpower the conversation.

ACTIVITY 9

Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to answer the questions below as a group.

Have you ever dealt with a situation that needed an additional resource solution? What happened and how did you handle it?

Would you handle the situation the same way now, or would you handle it differently?

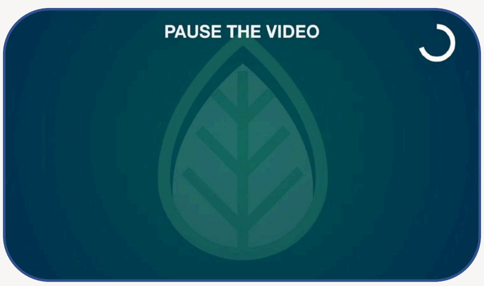
When you see this, pause the video and ask your employees to follow the instructions on the screen. They can record notes or thoughts on page 11 of the *Staff Video Course Guide.*

During this discussion, encourage all employees to participate. You may need to manage participation by helping quieter employees to share and ensure that more talkative employees do not overpower the conversation.

ACTIVITY 10

Individual Activity

During this section of the video, you will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to independently answer the questions below.

Have you ever dealt with a situation that needed a relationship solution? What happened and how did you handle it?

Would you handle the situation the same way now, or would you handle it differently?

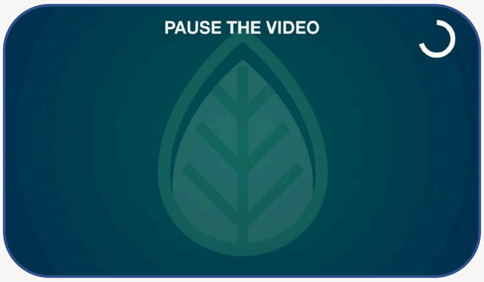
When you see this, pause the video and ask your employees to follow the instructions on the screen. They can record notes or thoughts on page 12 of the *Staff Video Course Guide.*

Employees will not be asked to share their answers with the group, however, emphasize that this is an opportunity for reflection

ACTIVITY 11

Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to answer the question below as a group.

Do you have any additional ideas for how the team can better follow up with clients to ensure they are satisfied with how the situation was handled?

When you see this, pause the video and ask your employees to follow the instructions on the screen. They can record notes or thoughts on page 13 of the *Staff Video Course Guide.*

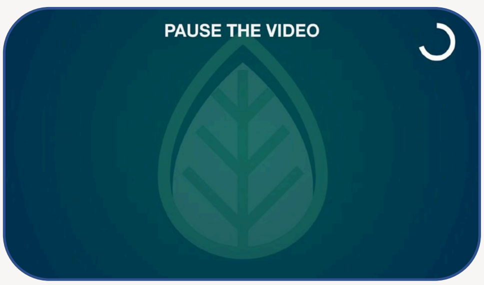
During this discussion, encourage all employees to participate. You may need to manage participation by helping quieter employees to share and ensure that more talkative employees do not overpower the conversation.

As people share, capture their responses on a flipchart or whiteboard by recording key points. Keep these notes as a reference and follow up on these suggestions as needed.

ACTIVITY 12

Individual Activity

During this section of the video, you will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to independently answer the questions below.

Think of a time when you had to discuss an uncomfortable topic with a client. What happened and how did you handle it?

Did you prepare for the discussion beforehand? Did you ask clarity questions?

Would you handle the situation the same way now, or would you handle it differently?

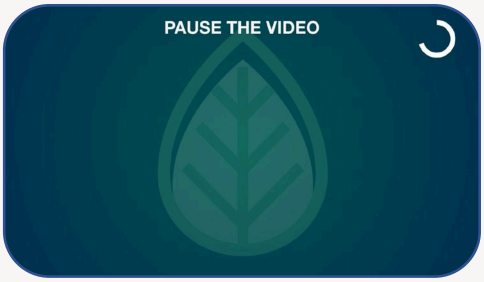
When you see this, pause the video and ask your employees to complete the activity on the screen by themselves. They can record their answers on page 14 of the *Staff Video Course Guide.*

Employees will not be asked to share their answers with the group, however, emphasize that this is an opportunity for reflection

ACTIVITY 13

Individual Activity

During this section of the video, you will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



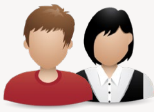
Pause the video. Take a minute to independently answer the questions below.

Have you ever made assumptions or judgments about money? If so, do you feel this affected the information or support that you offered to the client?

When you see this, pause the video and ask your employees to complete the activity on the screen by themselves. They can record their answers on page 15 of the *Staff Video Course Guide.*

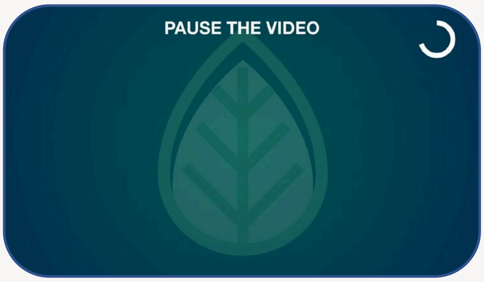
Employees will not be asked to share their answers with the group, however, emphasize that this is an opportunity for reflection

ACTIVITY 14



Paired Activity

During this section of the video, you will be prompted to complete an activity with a partner by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to complete the activity below with a partner.

Practice new skills for handling difficult client conversations by completing the role play activities on pages 16-25 of your Staff Video Course Guide.

When you see this, pause the video and ask your employees to work with a partner sitting next to them. If you have an odd number of employees, you can partner with an employee or create a group of three.

Employees can record notes or thoughts on pages 16-25 of the *Staff Video Course Guide.*

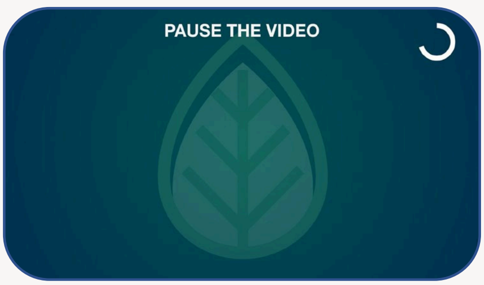
Circulate throughout the room as employees work together. Listen to their responses during the activity. Identify pairs that are doing well and coach employees who may be struggling to use the new skills they've learned during the module.

Once everyone has completed the activity, ask one or two exemplary pairs to demonstrate for the group. Have one pair model their conversation for scenario 1, and the other pair model their conversation for scenario 2. This peer modeling will help others who may find this exercise to be difficult or uncomfortable.

ACTIVITY 15

Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



Pause the video. Take a minute to answer the question below as a group.

What is one change you plan to make during your next difficult client conversation?

When you see this, pause the video and ask your employees to follow the instructions on the screen. They can record notes or thoughts on page 26 of the *Staff Video Course Guide.*

Encourage every employee to share at least one idea with the group.

As people share, capture their responses on a flipchart or whiteboard by recording key points. If you are recording notes on a flipchart, post this chart paper in a common area for future reference. If you are recording notes on a whiteboard, take a picture of these notes and email them to your staff.

These notes will serve as a reminder and accountability measure for the team to strive to make positive changes.

After the Meeting

Following this meeting, your role as a practice owner or manager is to support your employees in using this new process for handling challenging client interactions.

Here are some tips that will help you maintain momentum.

1. **Model new behaviors.** Model the new behaviors and strategies that were practiced in this meeting.

2. **Help employees prepare for difficult discussions.** If an employee is anticipating a particularly difficult or uncomfortable client interaction, help them by working through the "pregame" step together.

3. **Start the day with a reminder**. Start the day by reminding staff of the steps they can take for smoother client interactions including: preparing a "pregame," using listening and partnering questions, finding a solution together, and following up with clients to ensure a satisfactory resolution.

4. **Allow employees to share experiences.** Use staff meetings or daily huddles to allow employees to share their experiences using these new skills.

5. **Use role models.** Encourage employees to serve as peer resources for one another. Employees who become good at handling difficult client interactions can help others prepare for conversations and offer suggestions.

6. **Practice.** Create frequent opportunities for teams to practice scenarios relating to challenging client conversations.

7. **Acknowledge hard work.** Thank employees for working to make sure every client has a positive experience and personally let them know how much you appreciate their effort.