Module 4 – Client Care

Client care is the most important element of your business. You need to provide exceptional service if you want your clients to continue coming back, week after week, or month after month. In order to provide exceptional service, you need to have a system in place.

Whether you are conducting information consultations, regular service visits, or care calls, it is important to establish a routine that will add value to the experience for both you and your client. Once you develop the necessary forms, checklists, and systems, you will be able to develop an action plan for each appointment to ensure that your client is getting the service the paid for.

Developing a System

Sample Forms for Charts

Each client chart should consist of several forms, which provide important information about your client. The forms will vary depending on your area of specialty and which you feel will work best to accomplish your goals. Standard forms may, but are not limited to the following:

General Information Form – Regardless of your specialty, most charts require a general information form, which the client completes during or prior to the initial consultation. The general information form includes pertinent facts about the client, such as name, address, telephone, email, reasons for coming to see you, what they hope to gain from your program, health issues, medications, general eating habits and how they heard about you. You may choose to include any other information that is relevant to your specialty.

Service Agreement – You should establish formal guidelines for your service. Service agreements may include facts about rates, length of visits, cancellation policies, appointment procedure, your responsibilities to the client and the clients' responsibilities to you. This is where your privacy policy should be outlined as well. Always keep a signed copy of the service agreement in the file and give one to your client.

Program Objectives – Another form which may be useful is one outlining the objectives for the program. What is the clients issue, how do you plan to address the issue, is there is a timeline for achieving the objective? List any other relevant information about program goals and objectives on this form.

Statistics Chart – If you are gathering information about your client, such as height, weight, measurements, body fat, BMI, deficiencies, excesses, testing, etc., you will need a statistics chart to record the information gathered and plan to update it regularly as the client progresses.

Client Protocol Sheet – This form must be duplicated, keeping one copy in the file while giving the client another. On this form you outline the specific goals for the client, lifestyle and food changes, supplement suggestions with the specifics on when and how to take them, as well as any notes regarding your discussion. This is what your client will use as a reference and reminder between each visit.

Weekly/Monthly Consultation Chart - The weekly consultation chart should record the date, visit number, challenges, strategies, goals, recommendations, game plan and general information about each visit.

All of this information may be maintained on your computer, but is useful to make some notes during the appointment, to be flushed out once the client is gone. Moreover, many insurance companies require hard copies of client files in case of a future claim.

1. Outline the information you plan to collect on your general information form.

2. Outline the information you plan to include in your service agreement.

3. Outline the format for your program objectives form.

4. Outline the information you plan to collect on your statistics chart.

5. Outline the information you plan to collect on your Client Protocol Sheet.

6. Outline the format for your weekly consultation chart.

<u>Conducting an Information Consultation</u>

<u>Some</u> practitioners choose to offer a complimentary information consultation so that both the client and the consultant have the opportunity to learn more about each other. This is your opportunity, as the consultant, to 'sell' your potential client on the benefits of your service. In order to do this, you must have a system in place so you are able to explain the benefits of your service in 30 minutes or less.

The first part of the consultation is generally spent collecting some information about the client. Start by asking them to explain to you why they have come to see you. Determine their specific objectives for the program and ensure their goals are realistic. Before moving forward it is important that you believe the client has a realistic chance of achieving their objectives by working with you. It is also important to establish whether the client fits your profile of an 'ideal' client. Do they seem committed to change? Do they seem eager to work with you and open to incorporating your suggestions to achieve their objectives?

An excellent strategy at this point is to ask the client to tell you what they would like you to say to them should they begin to feel less committed or discouraged by their progress. This is excellent knowledge to have in your arsenal for future reference.

Once you have established that your potential client is the type of client you would like to work with, you may begin to explain your services. You should have a format for explaining the service you provide that outlines the assessment tools you will be using, testing, products, fees, policies, weekly appointments, and the conditions of your referral program.

You should have a visual aid to explain your program and/or services. You may use a PowerPoint presentation or a desktop easel book with pages highlighting the important points you would like to cover. For example, the first page might introduce your business name and tagline. The second page might cover the elements of your program or highlight the different services you offer. The third page might highlight the benefits a client could expect to derive from using your service. The fourth page might highlight the support you offer, such as regular visits and unlimited support via telephone and email. The fifth page might discuss your rates and the sixth page might discuss your referral program.

Obviously, you may choose to add more pages, depending on the scope of services and/ or programs you provide. Try to keep each page to five points or less. The most important thing to keep in mind when creating a visual aid for the information consultation is to ensure that it is clear and easy to understand, professional looking, and will help to keep you on point when explaining your services to a potential client.

Outline your information consultation presentation in point form.

Conducting Regular Service Visits

Prior to your first visit, you may wish to have your client complete some of the intake materials that you will require. This may be desirable for a number of reasons. First, having some material in hand before the client shows up at your door may provide you with valuable preparation time and, always having respect for your clients valuable time is important. The time actually spent with you may not be viewed as the best time for filling out forms.

Regular service visits, much like the information consultation, should have a clear objective. You should know specifically what those objectives are prior to the start of each session. For example, your objectives for each appointment may be follow-up on the previous visits' recommendations to establish whether the client implemented your suggestions, to discuss food related challenges the client may have had during the period, recommend strategies for coping with those challenges, review their food journal, make recommendations based on their food journal, assess progress to date, discuss potential challenges for the upcoming week, help the client to set goals for the upcoming week, for example, eating more fruits and vegetables, or committing a certain amount to time to meal planning or food preparation. Once you have established objectives for your service visits, you will have a barometer by which to measure whether you achieved your objectives for each session, thereby ensuring you are working with the client to ensure that they achieve their objections and have success on your program. Depending on the length of your visits, you may have 6-10 objectives for each visit.

Outline your objectives for service visits.

Conducting Virtual Service Visits

The decision about whether or not to offer virtual, or distance programs, is a decision that every practitioner eventually must face. The benefit of offering virtual services is that it provides more flexibility for both the practitioner and the client. You are not limited to working with clients in your geographic area. Most practitioners who specialize in virtual or distance programs combine telephone and email support by offering 30 minute <u>regular</u> telephone sessions and email support in between appointments, as required.

In order to offer a distance program, you should start by deciding on the format.

1. Which forms will you ask clients to complete initially and on an ongoing basis?

2. Will clients fax or email required forms prior to the scheduled appointment?

3. Will the clients establish the agenda for the appointments or will you have a pre-determined agenda for each appointment?

4. What are your objectives for each scheduled appointment?

5. Will you offer unlimited support via email in between scheduled appointments?

6. How long will telephone appointments last?

7. Will you call the client or will the client call you?

8. Who will be responsible for long distance charges, if applicable, and how will you work that factor into the cost of your service?

9. Will you offer only virtual sessions or a combination or in-person and virtual sessions?

10. What will the clients' responsibilities be prior to scheduled telephone sessions? For example, submit food journals, fill out required forms, record weight, establish agenda, etc.

<u>Care Calls and Emailing Clients</u>

Care calls and supportive emails are an important part of our job as nutritional consultants. We are working with clients to help them realize positive change in an important area of their lives. Unfortunately, such change rarely occurs quickly or easily. It requires a great deal of effort and perseverance on the part of both the practitioner and the client.

Many clients require very little additional support, while others will require additional support on an ongoing basis. If you are working with a client who does not seem committed or is struggling with emotional eating issues, for example, plan to offer that client additional support for a pre-determined amount of time to help them get on the right track. For example, if a client continues to make excuses for not filling out a food journal, suggest they email it to you every day instead. Or if a client is engaging in repetitive, destructive habits such as binge eating, send them daily emails for two weeks to encourage them and remind them of their goals. They will appreciate the support and many people come to you because they need someone to hold them accountable. Make sure you are holding them accountable for their actions while providing support and encouragement.

Follow up calls are also important, since they encourage client retention and compliance, which is likely two of the most common challenges you will encounter. Plan to call or email a new client a couple of days after they get started on your program to find out how they are doing and answer any questions they may have.

If a client calls to cancel an appointment and tells you that they will call back to re-schedule later in the week, make sure they do! Often times, people get busy and self-care once again falls to the bottom of their priority list. You are there to remind them that they have made a commitment to themselves and to you, and it is your job to make sure that they honor it. Call or email repeatedly if you have to, but make sure they do re-schedule their appointments. Otherwise, one missed appointment leads to several and you have lost a client.

Sending Personal Cards and Letters

In the age of technology, most people still appreciate a hand-written card or letter. It is quick and easy to send an email or instant message, but a card or letter requires time and effort and it sends the message that you do care. If you have clients who may have put their program on hold, send them a card or letter to let them know you are thinking about them and looking forward to their return. Perhaps send them an email link to a pertinent article or a reference you found in a book or magazine which will hit home. Even if they are not ready to return to the program at this time, they will appreciate your kind thoughts and will return when they are able to re-commit to the program. Sometimes, life interferes with good intentions and your clients need to know that you understand and can relate to their circumstances.

Action Challenge Four

1. Create a template for any forms you may need to use in your practice.

2. Create an Information Consultation presentation on PowerPoint or a desktop flip chart.

3. Create a checklist outlining goals and objectives for weekly service visits.

4. Create a sample ‘care’ letter for clients who have put their program on hold.