

# TURNING CONSULTATIONS INTO CLIENTS

GROWING YOUR PRACTICE

Western Region Chapter of the Aging Life  
Care Association™

June 22, 2016

Linda Fodrini-Johnson, MA, MFT, CMC  
Founder, Eldercare Services  
Chief Professional Officer, VillagePlan™

## GOALS FOR TODAY



- Infuse you with new language to interject into consultations
- Gain knowledge so that you focus on “where” the client is!
- Uncover “takeaways” for every consultation.
- Learn creative ways to follow up.
- Help families prioritize goals.



## SETTING UP APPOINTMENTS FOR CONSULTATIONS

How much time should you allow?



***"I look forward to working with you in putting a plan in to place to bring the best quality of life for your mom that gives you peace of mind."***

## YOUR GOAL SETTING



## WHY DON'T THEY TURN INTO CLIENT'S?

- You didn't tell them what you can do
- You talked too much about yourself
- They feel they should be able to do it alone
- They say Mom or Dad will resist



## WHAT DO WE COVER IN A CONSULTATION

- We address the presenting issue
- We offer suggestions and options
- We refer to local resources
- We are alert for possible Elder Abuse
- We affirm feelings and provide a safe place to talk
- They want support – we give empathy, hope, and a road map for the journey.
- We ask questions that lean to care planning ideas and creative solutions



## CARE PLAN SPHERES



## LET'S LOOK AT A CASE

- Daughter calls – Mom lives in your area and she lives in another State. She has questions about Mom's **quality of care** and wants some community resources.
- You suggest she and her brothers (they are local) come to see you before you **see their mother**. You have just set the stage for part two of your work with them.
- You **ask more questions** that lead to interventions



## A SIMPLE LINE OF QUESTIONS IN ONE AREA



- 1) Tell me about the current caregivers and the plan of staffing.
- 2) Tell me more about them bringing their family on the job?
- 3) The grocery expenses are growing... How much are they spending per week? (Possible Elder Abuse)
- 4) What and how do they get paid? This might be a place you educate family on new labor laws.



## POSSIBLE CARE PLANS AREAS



Elder Abuse with current caregivers neglect and no proactivity	Need for supervised help – Explain CM or Aging Life Care Experts™ role	Need for payroll services or agency care
Mother is falling. They could use a PT evaluation and a personal trainer or Lewy Body Dementia?	Mom is losing weight. She does not like what caregivers cook.	Daughter has to remind her mom to take medications daily. Brothers both travel and can't oversee care.
Mom has not seen her doctor in over a year. He keeps refilling her 10 medications.	Even though daughter is an attorney – they do not have a DPOA for healthcare.	Their Dad was a Veteran during WWII and mom might qualify for Aid & Attendants.

## LISTEN CAREFULLY



Before you design a plan of care or talk about “you” – **listen** to all the answers to your questions.

## MISTAKES WE MAKE

- We jump in and take away family roles too soon
- We give resources without knowing the end user (parent/client)
- We didn't include our selves in the interventions



## LANGUAGE TO USE



- I could find a....and take your mom to that appt. Bringing your questions and following up with you.
- I would like to explore the home care options for you. Explain the different types & why she needs supervision.
- If they say something like frequent falls – ask questions that might indicate another condition – and then recommend a clinic to evaluate. Offer to set up the appointments.

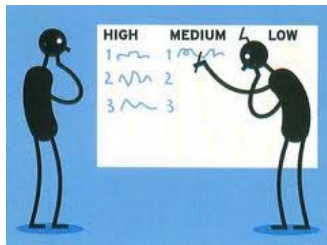
## LANGUAGE TO USE



- “It would be best if I could meet your mom before making suggestions for a \_\_\_\_\_.”
- “We need to protect you from being charged with Elder Abuse.”
- “We need to have strategies for all these interventions that protect mom’s self-esteem.”
- “I can be the gatekeeper and local traffic cop.”

## HOW MANY INTERVENTIONS IN THAT CASE?

- I would guess together we could come up with fifty ideas for these nine areas!
- Your job is to help them prioritize, **not overwhelm** the family.
- Give them one or two ideas to work on that are critical.
- Tell them **you could** take on #3 and #4.



## TAKEAWAYS



- Have a one page consultation summary ready to give them as they leave.
- Try to set a second appointment as a follow up.
- Be sure they walk away with one new piece of information, maybe it's about the POLST forms or Lewy Body dementia (show your expertise).
- Have a reason to send them an article on a specific item you talked about.



## SECOND TOUCH

- Before you end the session, say it would be best for you to assess their parent in their own home...and, you do it in a very non-invasive way.
- Set a follow up meeting to your session to check on their progress and give you time to research some items for them.



## FOLLOW UP

Call in a few days to see if they had any further questions.

Come up with something to add to what you gave them.  
“ I was thinking....”

If they still have not asked you to follow up in 2 weeks, give them a call and ask directly if they would like you to do one of the “priority” tasks they didn’t get done!

In about 10 days, send them some article (via email) that has to do with what their parent is experiencing.

Send them an invitation to a class or lecture you are giving....

Always ask if they want to be on your mailing list!

## QUESTIONS AND COMMENTS

---



## THE PRESENTER

---



Linda Fodrini-Johnson, MA, MFT, CMC  
Founder, Eldercare Services  
Chief Professional Officer, VillagePlan™  
Linda@EldercareAnswers.com  
www.EldercareAnswers.com

Linda has been a Geriatric Care Manager since 1984 and started her private practice in Walnut Creek, California in 1989. She is past President of the Aging Life Care Association™ (formerly known as NAPGCM) and past President of the Western Region Chapter.

The VillagePlan is a National Network of Care Managers who are members of ALCA – we serve EAP, Hospitals, Large Organizations and the General Public. All network care managers are paid their market rate and all billing is covered by the VillagePlan. There is no fees to join. For more information and to sign up go to [www.VillagePlan.com](http://www.VillagePlan.com)