TURNING CONSULATIONS INTO CLIENTS
GROWING YOUR PRACTICE

Western Region Chapter of the Aging Life Care Association™
June 22, 2016

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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.
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.”
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
女儿打电话 – 妈妈住在你的地区，但她住在另一个州。她有关于妈妈的护理质量的问题，并想要一些社区资源。

你建议她和她的兄弟们（他们是本地的）在你见他们的妈妈之前先来看你。你刚刚为你们工作的第二部分设定了舞台。

你问更多的问题，从而导致干预。

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• 你建议她和她的兄弟们（他们是本地的）先来看你，然后再见到他们的妈妈。你已经为你们工作的第二部分设定了舞台。

• 你问更多的问题，从而导致干预。
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

<table>
<thead>
<tr>
<th>Elder Abuse with current caregivers neglect and no proactivity</th>
<th>Need for supervised help - Explain CM or Aging Life Care Experts™ role</th>
<th>Need for payroll services or agency care</th>
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<tbody>
<tr>
<td>Mother is falling. They could use a PT evaluation and a personal trainer or Lewy Body Dementia?</td>
<td>Mom is losing weight. She does not like what caregivers cook.</td>
<td>Daughter has to remind her mom to take medications daily. Brothers both travel and can't oversee care.</td>
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<td>Mom has not seen her doctor in over a year. He keeps refilling her 10 medications.</td>
<td>Even though daughter is an attorney - they do not have a DPOA for healthcare.</td>
<td>Their Dad was a Veteran during WWII and mom might qualify for Aid &amp; Attendants.</td>
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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 ourselves 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.
- 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.
- I would like to explore the home care options for you. Explain the different types & why she needs supervision.

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

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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.

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