

# Telephone Assessment Programme

*Workshop Guide / Talent & Development Partner Team*

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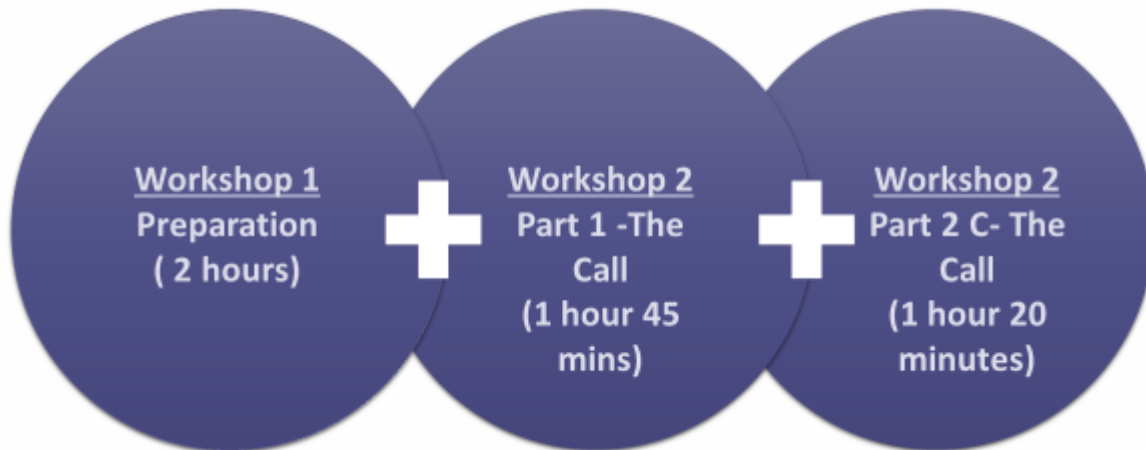
## Contents

Welcome to the Telephone Assessment Programme .....	4
Programme Outline .....	4
Learning Outcomes .....	4
Workshop One – Preparation.....	5
Your surroundings .....	5
Systems and documentation .....	6
Yourself – Body and Mind .....	7
Emotion Contagion:.....	8
HALT – Self-care .....	9
The Effects of Posture – Self-validation Theory .....	10
Smiling:.....	10
Winning Mind Set – Breathing Exercises:.....	11
Intentional breathing .....	11
Workshop Two – The Call.....	12
The Telephone Call Structure:.....	12
Security and Compliance:.....	13
The role of a Companion: .....	13
Empathetic Listening and Building Rapport.....	15
Communication Styles.....	15
Advantages of applying the Communication Skills model in telephone assessments .....	19
Listening .....	20
The Five levels of Listening .....	20
Source: Stephen Covey – The 7 Habits of Highly Effective people .....	20
Empathetic Listening: .....	21
Building Rapport: .....	24
Questioning Skills: .....	25
The Escalation Cycle (or Loop) .....	29
More Tips and Hints for Telephone Communication Skills .....	30
Post Call – looking after yourself .....	32
Toolkit of Resources:.....	33
APPENDIX A: Telephone Call Structure .....	35
APPENDIX B: Communication Styles Questionnaire .....	47

Appendix C: Resource Toolkit: ..... 52

## Welcome to the Telephone Assessment Programme

### Programme Outline:



- **Workshop 1**

Preparation for the call, your workspace, your documentation and structure, your body and mind set.

- **Workshop 2**

The Call –working with a call structure and communication skills over the telephone, follow up – concluding the call, your own self-development and action planning

### Learning Outcomes:

By the end of this programme you will be able to:

1. Be aware of how you can adapt your transferable skills in face to face assessment to providing effective telephone assessment to our customers
2. Be able to use a range of enhance auditory and oral communication skills to compensate for the loss of observational skills when holding an assessment
3. Apply a call structure to your telephone assessment calls assessment
4. Be confident in applying the security and compliance checks required at the start of each call
5. Be confident in closing the telephone assessment with appropriate 'Follow up' procedures

## Workshop One – Preparation

Preparation can be broken down into three key areas:

- Your surroundings
- Systems and documentation
- Yourself – body and mind



### Your surroundings

Make sure you have set up your work areas as far as possible in line with the H&S Guidelines for working from home: [Temporary Homeworking Guidance for Colleagues](#)

Preparing your surroundings is essential when making calls outside of our usual working environment, things to consider:

- Set up a designated work station
- Minimising noise interruptions such as Washing Machines/Dishwashers etc.
- Find a quiet room – remember confidentiality
- Maintaining a tidy workspace
- Complete a Desk Assessment
- Are you able to move freely and comfortably
- Is the room is well lit
- Are you in a comfortable seating position
- The temperature

- Wherever possible find a quiet room where you can work alone – remember you will be discussing confidential customer information.
- Consider what could distract you from fully attending to a claimant. What can you do to remove these distractions?
- Have a glass of water to hand. Make sure you have a glass of water to hand to refresh yourself if your mouth or throat becomes dry mid-assessment



## **Systems and documentation**

The next preparation steps are around the set-up of systems and the relevant documentation needed to achieve the best results during your calls:

- Do you have the call structure to hand?
- Try and have any documents you will need to refer to on a document stand so you do not need to frequently move your head, neck and shoulders around to check on documents
- Are you familiar with the mandatory security checks for identification?
- Have you reviewed all of the evidence available to you
- Have you logged into the required systems?
- Is the equipment plugged in to a power supply?
- Is your system due any updates that could launch during a call?
- Test your headset/handset and ensure the sound is working both ways
- Check that you have a strong signal to avoid getting cut off mid-assessment

### Top Tips - Some checks to undertake before making your first call:

- Test with someone else in a call – is your usual speaking volume and speed appropriate, clear and understandable – in general you will need to speak more slowly and may need to speak at a higher volume
- Try recording and listening back to your own voice. How would you like to adapt your voice for telephone assessments?
- Check how noisy your keyboard is in the background – is it impacting the other person ability to hear what you are saying
- If you are not using a headset check on the impact on what you are saying if you do need to move your head around to check on documents – this can cause a variation in clarity and volume

### Yourself – Body and Mind

During these challenging times it is important for your own self-care to have a winning mind set and some daily routines to help give focus and structure to your day – here are just a few tips and hints for achieving this:



- ✓ Have a clear focus and plan for each day
- ✓ Write a daily to do list and have a personal preparation checklist
- ✓ Set yourself some small goals for each day
- ✓ If working from home prepare yourself as you would if going into the Assessment centre – getting dressed for work can be beneficial and separate your work time from your personal time
- ✓ Know when to step away from your work station
- ✓ Ask for support when needed
- ✓ Stay in conversation with your colleague

## Emotion Contagion:

In these difficult and challenging times all of us, to some degree or another, are moving through the bereavement curve as we face restrictions and changes to our way of life, liberty and a loss of community. This can trigger strong emotions in each of us.



Emotional contagion is the phenomenon of having one person's emotions and related behaviours directly trigger similar emotions and behaviours in other people. Emotions can be shared across individuals in many different ways both implicitly or explicitly.

In the company of someone else who is displaying the same emotional response that we are feeling then emotional contagion can happen.

You can prepare yourself for the enhanced emotional states of customers that you might find yourself dealing with by:

- Regular daily resilience techniques and activities to strengthen your emotional stability
- Good self-preparation before calls
- Regular self-scanning to check your personal state of wellbeing
- Breathing and focusing exercises
- Ensuring you have the release valve of someone you can talk to after a particularly difficult call

For more information click on this link to read this interesting article:

[Protect Yourself - Emotional Contagion](#)

## HALT – Self-care

Halt stands for Hungry, Angry, Lonely, or Tired. The model was first developed to help addicts in recovery see when they were at their most vulnerable to relapse due to a lowering of physical or mental well-being.



Since then it's been useful for other people as well – both in the workplace and in their personal lives as a quick self-scanning exercise to check their state of body and mind before putting themselves into a physically or mentally demanding situation.

Always do a personal scan/check and be aware of being Hungry, Angry, and lonely (alone, feeling unappreciated or unloved), Tired.

We can't avoid some of them and on bad days all of them!!! But do a quick mental scan and do what you can during the day or before the next call.

- Drink plenty of fluids
- Eat regularly to keep your energy levels up (has anyone ever experienced being Hangry?)
- Speak briefly to a colleague
- Call a friend during a break
- Stretch out
- Grab a breath of fresh air
- Take a brisk walk at lunchtime
- Get a good night's sleep

## The Effects of Posture – Self-validation Theory

- Your posture can have a significant effect not just on your physical well-being but also on your self-evaluation of your emotions and how positive, confident and in control you are feeling.
- Experiments have been run looking into this theory
- Results from studies proved in favour of the self-validation theory. Participants' attitudes when placed in a hunched posture reported were more likely to feel stressed compared to participants who assumed a relaxed position.
- Ensure you can sit in an upright but relaxed position with no hunching up of your shoulders –use a headset to ensure you don't hunch your shoulder to support your phone.
- Try some power posing at the start of each day

## Smiling:

“One way to positively affect the inflection in your voice is to smile, especially when you first answer the telephone. The reason is not psychological but rather physiological. When you smile, the soft palate at the back of your mouth raises and makes the sound waves more fluid. Smiling helps your voice to sound friendly, warm and receptive”

## The Naked Scientists

### Smiling Affects Your Vocal Tone

When you smile while talking, your voice automatically sounds more positive and friendly. Don't believe it? Try saying something negative while smiling. You'll notice that your tone is more upbeat and positive than if you were saying it with a straight face or a frown.

### A Positive Attitude Is Infectious

When you make a point to be positive during a phone interaction, the person on the other end of the line often takes your cue. Starting with a smile helps you achieve that.

### Smiling is a Great Mood Booster

Studies have shown that even forced smiling can trick your brain into feeling happy and boost your mood. Smiling spurs a chemical reaction in the brain, releasing specific hormones, including dopamine and serotonin which are known to improve mood.

## Winning Mind Set – Breathing Exercises:

- Deep breathing is one of the best ways to lower stress in the body.
- This is because when you breathe deeply, it sends a message to your brain to calm down and relax.
- The brain then sends this message to your body
- Breathing exercises are a good way to relax, reduce tension, and relieve stress
- If you are concentrating on a breathing exercise including counting this also requires you to focus on the counting which can be a form of mindfulness and enable your conscious brain to take over and subdue some of the whirring thoughts from your sub-conscious enabling you to gain some clarity of thought, perspective and helps with problem solving
- Additionally intentional and deep breathing - particularly with a longer outbreath forces more oxygen into your lungs which is transferred via the bloodstream to the brain – for added mental functioning, and an increase in the removal of carbon dioxide from your body on the out breath



There are many breathing exercises associated with Yoga and Pilates all of which are great to use. Here is one simple technique for you to try:

### Intentional breathing

Simply put it involves taking slow, deep, full breaths through the nose releasing the breath through your mouth – and holding your breath twice in the cycle

- Breath in for a measured count of 4
- Hold the breath in your body for the count of 4
- Using your diaphragm to force the air out in a slow controlled way for the count of 6
- Hold your breath for a count of 4
- Then repeat as many times as you feel the need to
- Not only is this form of focused breathing good for clarity of thought it is also very relaxing and calming and is good to do every day

## Workshop Two – The Call

- The Telephone Call Structure and follow up
- Communication skills

### The Telephone Call Structure:

**See Appendix A for the full Telephone Call Structure – this should be read in conjunction with the Covid 19 WCA telephone Assessments – Guidance for HCPs**



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## Security and Compliance:



When you conduct a telephone assessment, you will be responsible for carrying out the identity check on your own; this presents a challenge as you cannot verify a physical ID (such as their passport or bank card). You will therefore need to carry out specific checks to verify the person you are talking to *is* the customer.

Please ensure you follow the guidance in the:

### **Covid 19 WCA telephone Assessments – Guidance for HCPs**

## The role of a Companion:

As per WCA Handbook Guidelines, the role of a companion can be vital to offer the claimant support and especially where there are issues with insight, the information they provide can be essential for effective information gathering.

It may therefore be useful if a claimant has a companion in person present who lives in the same household, to instruct the claimant to use “speakerphone” facilities.

If the person does not live in the same household, it may be possible for them to be dialled in through the phone line, however; this may not be technically possible in all cases.

Without non-verbal cues it may be more difficult for the companion to know what's expected of them and when/how much they should be contributing.

Here are some pointers around making this explicit:

- In the introduction: “This phone call will focus on <customer name> and the answers they give, but in terms of the role you can play in this call there are two important things you can do:
  - Firstly, you can add extra insight and detail to the information <customer name> is giving me, please add this at any time during the call.
  - Secondly, you can provide valuable support to <customer name> so please feel able to speak to <customer> at directly any point during the call if you think it would help them in any way.”
- Throughout the assessment, regularly asking the companion for additional input.
- Ask companion for their input if they are struggling to get input or clarity directly from the customer.

## Empathetic Listening and Building Rapport

As an HCP you use these skills and techniques on a daily basis but we hope this guide will provide you with a useful reference source and also some background to understand why some of the things we do or say work for us.

If we know why a technique works then we can knowingly use it where appropriate and also develop and enhance it because we understand the value it brings to the outcome of that conversation – and in this case the report..

In this guide we will be covering communication styles, empathetic listening, rapport building and questioning techniques.

## Communication Styles



Almost all of us will have a preferred sensory preference or primary system that we prefer to another when it comes to communicating. Of course we are able to communicate on a day to day basis perfectly adequately with most people regardless of our, or their, preferred system or style. But at moments of pressure and stress – such as difficult conversations, interviews, presentations, speeches we tend to return to our preferred style.

It is this style through which we process most information, what we perceive (take in, see, hear, feel), it is the method by which we store that information in our memory, how we retrieve it and how

we communicate with others. This is of course a generalisation, yet it will give you a clue as to what might be going on for yourself and for others.

This preferred system can be determined through our physiology (body language and facial expressions, eye movements) and the predicates used in a conversation. Predicates are words and phrases (primarily verbs, adverbs and adjectives) but also sayings, proverbs and idioms we use and which can give clues as to the communication style we feel most at ease with.

Knowing the preferred representational system of someone is useful in virtually any context. Initially developed to support therapists in communicating effectively with clients and patients, application of this knowledge (part of a wider group of practices known as Neuro Linguistic Programming or NLP) can assist anyone involved in sensitive or complex communications. It can help you to gauge the other person's style and to adapt your own approach, non-verbal and verbal, so as to easily and quickly establish a rapport. Where this is achieved you will often hear people use phrases such as: you are "on the same wavelength"; "talking the same language" as them; "understanding where they are coming from"; or simply that you "get them".

**VISUAL** is the preference dealing with the sense of sight.

It can be internal or external. Often people with visual style use words like see, picture, sight, looks, view, overview, focus, clear, hazy, vision, twinkle and phrases like an eyeful, it appears to me, take a look at, beyond a shadow of a doubt, dim view of things, get a perspective on, mind's eye, rose tinted glasses, tunnel vision, big picture thinking.

Visual people look at the world through visual images and understand by making pictures of the meaning. They are often gazing over your head or off to one side; this is because they are literally looking at the pictures or movies they are creating while you are speaking.

Looks are very important to visual people. When dealing with them, remember the old saying: "a picture's worth a thousand words". These are the people who really do form first impressions.

In general, visual people will tend to speak very fast, move their hands on shoulder or head level, sit bolt upright and give big importance to their visual appearance.



**AUDITORY** is the preference dealing with the sense of hearing.

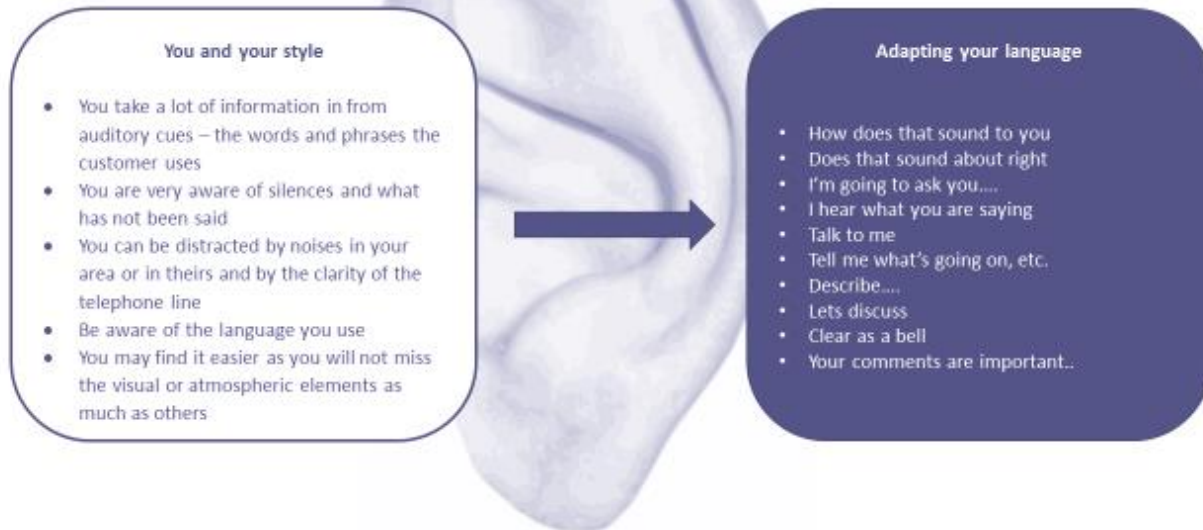
It can be internal or external. Lowering your voice, slowing it and speaking in, for example, a rhythm, will cause an activation of the auditory system. The auditory system is also activated by tone, speed and emphasis.

Auditory people use words like sound, hear, discuss, interview, listen, loud, remark, rumour, say, speechless, tune in and phrases like clear as a bell, sounds like, keynote speaker, purrs like a kitten, to tell you the truth, word for word.

Auditory people listen carefully to what people have to say and accept it if it sounds right. They remember events and experiences by the songs they were listening to at the time, or the tone of voice the person used. Often they will tilt their heads in order to line their ear up to receive the sound most clearly. These are the people who happily spend hours on the phone.

Auditory people will tend to breath from the middle of their chest, get easily distracted by noise, are medium to fast talkers, and gestures are usually on chest level.

## Is your style Auditory?



**KINESTHETIC** is the preference dealing with feelings and sensations.

It can be internal or external. Associated words include: concrete, emotional, sensitive, firm, flow, feels, touch, heavy, burdensome, hard, weighty, pressure, grasp, lukewarm, foundation, stress, structure, demonstrate and phrases like boils down to, get a load of this, heated argument, keep your shirt on, get a handle on, pull some strings and start from scratch, let's get busy.

Kinesthetic people like to get a feel for things and people. They need to feel the garment, squeeze the melon, brush away dust and pet hairs, picks things up and play with them. They need to be active and doing. They process information slower than the visual and auditory people, often looking down towards their stomach while you are talking to them- they are literally getting a gut feel for what it is you are saying

Kinesthetic people need to meet you in person. Talking over the phone can be more difficult for them as they want to meet you, shake your hand and get a feel for who you are and what you can do for them.

Kinesthetic people will tend to talk quite slow, have low breathing from the belly, stand quite close to whoever they are talking to, and have low and smooth gestures.

## Is your style Kinaesthetic?



## Advantages of applying the Communication Skills model in telephone assessments

In a telephone assessment situation where nonverbal clues are missing, the use of specific phrases and words and the responses you receive can be very effective in establishing verbal rapport. It can also demonstrate a depth of empathy that can make the other person feel more relaxed and at ease, more engaged in the assessment and more prepared to share information with you in a conversation.

The main advantage of applying the model is that once you recognise the specific preferences of your customer you can adjust your language and understanding according to their preferences. This will allow you to reach your customer more effectively.

It can also ensure that your customer feels understood and comfortable that they are talking with someone who is on their 'wavelength'

Use in conjunction with empathetic listening skills for powerful and effective one to one communication whether in person or over the telephone

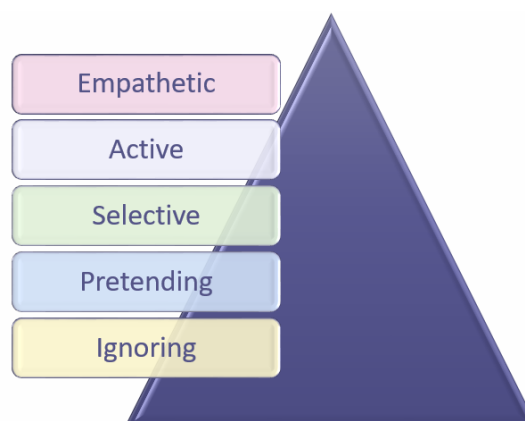
## Listening

“Listening is the ability to accurately receive and interpret messages in the communication process. Listening is key to all effective communication. Without the ability to listen effectively, messages are easily misunderstood. ... Effective listening is a skill that underpins all positive human relationships.”

### Source - Skills You Need

Take a few minutes to read this interesting article – **Skills You Need – Listening Skills** Included is a quick self-assessment test of your listening skills and some myth busters of preconceptions about listening skills. You can find the link in the Resources Toolkit in the Appendix.

## The Five levels of Listening



Source: Stephen Covey – The 7 Habits of Highly Effective people

### 1. Ignoring

The lowest level of listening is called ignoring – not listening at all. If you are distracted by anything while talking to a user, they can get the impression that you are ignoring them. For example, while the user is speaking, you start a conversation or interject a comment with another person in the room. You are ignoring your user.

### 2. Pretend Listening

Pretend listening is most easily explained in the face-to-face conversation. You're talking to the other person and they have that “backpacking in Brazil” look in their eyes. On the phone it

happens when you say things like “I see” and “OK,” etc. while working on an unrelated email or replying to a text. People can tell you’re distracted.

### 3. **Selective Listening**

During selective listening we pay attention to the speaker as long as they are talking about things we like or agree with. If they move on to other things we slip down to pretend listening or ignore them altogether.

### 4. **Attentive Listening**

Attentive listening occurs when we carefully listen to the other person, but while they are speaking we are deciding whether we agree or disagree, determining whether they are right or wrong. Instead of paying close attention to the other person, we’re formulating our response to what he or she is saying. At all four of these levels it should be evident that we are listening to our own perspective, and in most cases with the intent to respond from our experience.

## **Empathetic Listening:**

The fifth level of listening is **Empathic Listening**. Empathic listening, also known as empathetic listening, is the top level of listening. Empathic listening is the highest level of listening, and the hardest to accomplish.

Empathic listening does provide a number of distinct benefits to the effectiveness of a telephone assessment:

- It can have a therapeutic value for someone struggling with a health problem
- As the speaker hears himself talk, he gains more clarity about his problem and becomes better equipped to describe symptoms and effects to you which can help with assessment
- Additionally when someone feels heard, an emotional burden is lifted, and they feel less stressed and confused

As an empathic listener, you empower the speaker to greater self-esteem and self-awareness simply through your willingness to hear them.

Empathic listening is not an easy skill to master:

- Most of us would rather talk than listen
- Time constraints involved in completing a number of assessments a day
- Issues of telephony and technology, signal, equipment, clarity etc.
- Lack of observational cues to support what you are hearing
- The customer may be in a state of stress, pain, anger at the current situation and not initially listening themselves to what you are saying and how

**The Power of Empathic Listening** is a great article to read for some great strategies for empathic and compassionate communication. Follow the link in the Resource Toolkit

To achieve empathic listening:

- Slow down and take the time. Be patient
- Offer empathy and not sympathy
- Attention is not overtly verbal but it can be sensed by the claimant. Give them your undivided attention for the entirety of the telephone conversation.
- Verbalise non-verbal cues e.g. compassion, nods, appreciation, reassurance
- Talk less and listen more
- Explain to the customer that you will need to type while they are talking but assure them you will be listening.
- Create linkages – refer back to points raised earlier in the conversation to demonstrate you've been listening.
- Reflect and use 'acknowledging paraphrases' to reflect back what you've heard and the feelings you have noticed the claimant express e.g. "can I check I've understood you", "so, this is what I've heard..", "help me make sure I've got this right". This will:
  - signal that you are listening and trying to understand
  - help to identify any misunderstandings

- encourage the claimant to consider the accuracy of your understanding and elaborate or clarify further
- If the customer uses specific emotive or charged words or phrases do not change them when repeating back and do not add a question into your voice as it can appear you are doubting their use of the word, its applicability or veracity
- Use dangling questions to elicit more information
- Avoid interrupting even if you have something important to add. Wait until the individual has finished what they are saying, then repeat/reflect back and ask your further probing questions
- Summarise more regularly than you would do in a face to face assessment to ensure you don't overlook anything
- Do a short recap of what you have discussed, and any follow up on your part or the others part that is needed
- Allow for silence
- Be specific about follow up and safety netting

A great way to evaluate whether you're doing empathic listening or not is to ask yourself "WHERE IS YOUR FOCUS?"

As you think about the five levels of listening, think about the fact that the first four levels are self-focused, while the fifth level (empathic listening) is focused on the user. When your focus is completely on the user and not on yourself, your level of empathy and relationship will be much higher.

### **Tips on Listening for Telephone Assessment:**

Specifically when listening in a telephone assessment remember that:

- Observations can still be gathered from such verbal cues as:
  - tone of voice
  - did they seem in pain
  - were they breathless,
  - did they seem to get distracted

- were they upset/tearful during the call
- Remember to listen to what's not being said as well, if what the customer is reporting does not seem consistent with how they sound on the phone or level of function reported remember to gently probe into this e.g. "You sound sore, what have you done today and have you taken your medication?".

## Building Rapport:

Establishing rapport from the very beginning of the telephone assessment and throughout will really help you with putting the customer at ease sufficiently so that they can feel comfortable to answer fully the questions you are asking.

**For many customers a telephone assessment will be just as strange and unsettling (if not more so) as it is for you.**

Customers may be suffering from high levels of personal strain at the present time and want to vent – acknowledge and allow them some time to talk, express their feelings and frustrations before moving into the body of the call.

Asking the customer how they are will open up the conversation. This will help establish rapport and put the customer at ease. Say something simple like -

### **"How have things been for you recently?"**

Some simple techniques for establishing rapport include -

- Asking how the customer wishes to be addressed
- Increase the times when you reflect, summarise and repeat back what they have said
- Smile with your voice
- Use 'verbal nods' and respond in a professional and polite way – apply the same skills and techniques you would use in a face-to-face assessment (you may be doing this unconsciously!)

If the customer says they were not expecting your call, you should explain the purpose of the call and ask for their consent to continue. If they do not consent, inform the customer that someone will contact them in the near future to rearrange their appointment. If a situation like this arises you should end the call, document it, and inform your line manager at the end of the day.

## **Rapport and Communication:**

In a face to face assessment then body-language and facial expression count for 55% of the information that we each take in about the other. It is therefore essential that you use all your skills and techniques to establish a verbal rapport in the absence of visual cues for you but also for the customer.

In a face to face the customer takes in many visual cues about you – and these contribute to how relaxed and at ease they feel as you start the assessment. Without those observational cues for the customer, on a telephone assessment you need to add in additional verbal cues to establish and maintain a good level of verbal rapport.

Likewise for you – in a face to face assessment you have the first few minutes as you collect the customer from the reception area and get them settled into the assessment room to observe them. You will have been making visual observations of their body language, ease of movement, facial expressions, pallor/flushed face etc. but these visual cues are not available to you.

## **Questioning Skills:**

You already have great questioning skills that you use daily in assessments.

When we ask questions in a face to face situation we are looking for visual cues (in their facial expressions and in their body language) to indicate that the customer is ready and waiting for the next question, we can also observe how they react to a question - are they deep in thought planning their answer, or looking confused about what they heard and possibly have not understood the question

Questioning skills do not change when conducting telephone assessments but we do need to be more aware of the question structure that we apply to ensure that we keep the customer engaged, listening and responding. Two useful techniques to be aware of are:

- TED
- Question Hierarchy

## **TED – Tell, Explain, Describe**

This simple three step structure enables you move through a series of questions to get the information you need whilst feeling more like a conversation for the customer and less formal than a series of W&H questions (questions all starting with a W or H – who, what, when, where, why, how)

TED questions can be used at any point when you feel you have heard something that requires further exploration, and they are best used in between open questions and closed questions to probe for specific information

Some examples of TED questions include:

- Tell me, how does that affect you?
- Tell me, has this happened before?
- Tell me, how often does this happen in a typical day?
  
- Explain to me, what impact has this had on your...?
- Explain to me, how did this situation begin?
- Explain to me, what difficulties do you face when you try to...?
  
- Describe how you felt about that
- Describe how it looks
- Describe your.....

These probing TED questions help to pinpoint the relevant insight from a customer's open response. The style of wording helps to prompt the customer into giving you all the relevant information you need. By starting with these words you are essentially demanding an answer from the customer without them knowing that you are.

## Question Hierarchy:

Consider using a question hierarchy when on the telephone – especially as you cannot make eye contact and show empathy, encouragement and support via facial expressions:

- When, Where and Who are all questions that require straightforward factual answers and a good way to start a conversation and get some facts on the table before moving onto the next level of questions
- What and How – these questions start to allow the person answering them to respond with their own interpretation, assumptions and selective recall and so while you will get their version of what happened and how it came about that might not be all of the story – so you may need to then ask probing questions to find out more
- Why questions should always be asked with careful consideration as to what you hope to achieve. Questions that start with why have a judgemental element to them especially if you do not pay attention to where you place emphasis – as this can change the inference in the question and the outcome you get.
- Try saying this simple why question with the emphasis on a different word each time- think about how that might come across to someone who is awaiting feedback from you about their performance...
  - **WHY** did you do that?
  - Why **DID** you do that?
  - Why did **YOU** do that?
  - Why did you **DO** that?
  - Why did you do **THAT**?
- If you ask 'Why' questions too soon before you have established rapport and empathy then the person you are speaking with may close down and the discussion can easily turn into an interrogation:
  - They may be concerned that they are being judged.
  - They may be wondering whether they have they made the wrong decision, taken the wrong action, are they in trouble
  - This is not a conducive environment for giving feedback.

## **Tips on Asking Questions in a Telephone Assessment**

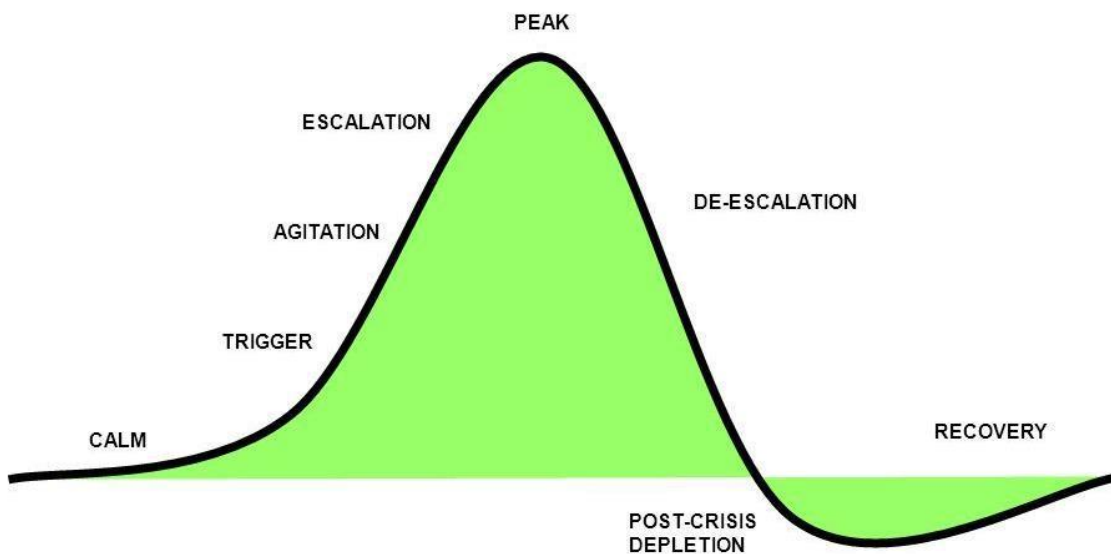
- You may have to adapt your normal questioning style
- If you do not get a response you may need to;
  - repeat the question
  - check if the customer heard you
  - check that they understood the request
  -

## **Interruptions:**

This is a nuanced area of communication skills as it is so sensitive to context. Given the absence of supporting visual cues, it also plays a more heightened role on a telephone conversation. One way to summarise the advice might be:

- As a general rule of thumb try not to interrupt as it can be damaging to empathetic listening. Allow pauses and don't rush to fill silences.
- You may have to lay some ground rules at the start of the assessment i.e. I am going to ask you some quite specific questions then later on we will go into how these affect you in more depth
- There may be situations when interrupting is necessary e.g. if the claimant is over-talking, digressing. In these situations a polite explanation is required as to why you are interrupting.
- There may be situations when you inadvertently interrupt the claimant. In these situations apologise and attempt to recover the flow e.g. "sorry, I cut you off there, please carry on", "forgive me for interrupting you there", "sorry, were you about to say something more" etc.
- Avoid interrupting even if you have something important to add. Wait until the individual has finished what they are saying, then repeat/reflect back and ask your further probing questions

## The Escalation Cycle (or Loop)



- Angry or emotional situations do not always start with angry or emotional behaviours. Even a benign conversation can become acrimonious and destructive.
- The first person's language, tone, and behaviour can trigger an aggressive response in the second person. This process and the resulting escalation cycle is familiar to most of us from conversations and situations with family and friends – people who can easily “push our buttons” and particularly at times when we are already feeling stressed, anxious, uncomfortable.
- The customer can rapidly get more and more frustrated and abusive. In a typical escalation cycle, the employee responds by over-reacting, which in turn, increases the anger of the customer. If the cycle is not interrupted, the situation becomes an out-of-control crisis situation and develops its own head of steam.
- Escalation doesn't have to happen.
- It is important that you are aware of your own behaviour, language, tone, assumption and triggers and how these contribute to this cycle, particularly because you may then bear the stress problems that a crisis can bring.
- In many cases the cycle can be prevented from starting by excellent customer service skills

- It can most certainly be stopped from worsening by stepping back from the situation, by not taking the bait, moving to use defusing techniques. It is a lot easier to prevent hostile behaviour than deal with it and the ramifications once it's full blown.
- If the customer is abusive, try explaining to them what you are doing, don't let things escalate remain calm and keep your voice tone low. If the situation cannot be resolved the assessment will have to be terminated. Follow normal UCB process if needed.

### **Defusing Techniques:**

- Empathy, patience and calm: Especially in the current circumstances
- Affirmation: Wherever possible affirm that what the customer tells you is correct
- Customer choice: Wherever possible give the customer choices even if it is in how you address
- Active listening: Apply excellent active listening techniques
- Acknowledgement: Acknowledge that the customer has the right to be angry/upset/sad
- Limits: Set limits for the reasonableness of the customer's behaviour and stick to them. But without using the words – "I am warning you...."
- Reaction - Do not react. Ignore challenging questions or comments

## **More Tips and Hints for Telephone Communication Skills**

### **Here are some more useful tips and hints for effective telephone assessments:**

- Pick up on cues and the use of strong and highly emotive language – reflect these back with a question
- Expect and allow pauses in the conversation – do not jump in to fill the silence by repeating the question, or rephrasing it
- Allow the caller sufficient time to respond and frame their answer – they may find it more difficult to put what they want to say into voice when they cannot see a look of encouragement on your face

- Check regularly that the caller can still hear you clearly – in case they have a hand free phone and have wandered away from it.
- Speak clearly and slowly and avoid the use of medical terminology or jargon unless necessary to do so
- Regularly demonstrate verbal empathy, acceptance, sensitivity and support
- Summarising and signposting need to be exaggerated to clarify transitions between open and closed questions, topics of discussion and the flow of the assessment
- Check understanding regularly

### **Things not to do and say during Telephone Assessments:**

- × Using a tone of voice over the telephone that is too business-like, impolite or unprofessional.
- × Not checking your volume and speaking with a volume that is either too loud or too quiet.
- × Enunciation – slurred, mumbling.
- × Using a monotone voice without any light and shade or warmth
- × Speed –being too rushed and quick and not allowing the customer time to think and answer fully
- × Try not to use of filler words e.g. um, uh, er, like, sort of, you know. These can undermine the professional tone of the call.
- × Do not bombard the claimant with too much information at once – whilst it is important to give a full introduction, make sure the information is given slowly in small chunks so that it can be easily digested.
- × Avoid jargon – use precise, straightforward language.
- × Multi-tasking – inattentiveness will be experienced by the claimant as awkward silences and a distracted tone of voice. This risks damaging rapport because it could be interpreted as a lack of respect and credibility.
- × Jumping to conclusions – making and/or documenting assumptions that you have not evidenced and cannot justify is a signal that you need to refocus your attention on what the claimant is saying.

## Post Call – looking after yourself



If you feel particularly affected by the call, take a 'timeout'. Take a few minutes to:

- Get up and move around
- Stretch
- Make a drink
- or anything else

...before you prepare for the next call

If you are finding it difficult to 'reset', contact your line manager for support. You may wish to contact the EAP if you have experienced a very challenging call. Do not be afraid to reach out to others. Remember: these are unprecedented times and you need to look after yourself to be able to look after our customers.

Create a personalised 'timeout list' which you can keep on their desk/pin to your wall (or any other place in your home) which you can refer to after a difficult call.

## Toolkit of Resources:



- Please see the toolkit that accompanies this programme
- All resources can be accessed easily
- Resources cover the communication skills elements of the programme
- Most resources are on Percipio
- For details on how to access to your Percipio account please see [Accessing Percipio Digital Platform](#)
- Other resources include on-line articles and TED Talks

## Self-development and Action Planning

- Please take some time to reflect on what we have covered in this programme and any lightbulb moments
- Do remember to maximise the toolkit for further resources
- Your facilitator will be available to provide further support on a 1:1 basis
- As you gain more experience with this new way of conducting assessments note your own successes and best practices and share these with your colleagues

## Appendix:

- A. The Telephone Call Structure
- B. Communication Style Questionnaire
- C. Resource Toolkit



## APPENDIX A: Telephone Call Structure

STAGES OF CONSULTATION	WHAT YOU NEED TO DO	HOW TO DO IT	RATIONALE , SUGGESTIONS and NOTES
<b>Review customer file</b>	Prepare for the call	<p>Read the questionnaire, all supporting FE in file, any previous reports either face to face or scrutiny outputs, Med 3, FRR2's and FRR4's.</p> <p>Make sure you are in a confidential space and your work station is set up correctly.</p> <p>Make sure all equipment is fully working and fully charged.</p> <p>Have a glass of water on hand as you may be on the phone for some time.</p>	To ensure you are prepared for the call and fully informed of the client requirements. Make sure you have reviewed all evidence. If the evidence suggest possible support group focus on this area first.
<b>Step 1: Greeting</b>	Identify the customer Introduce yourself	<p>"Good Morning /Afternoon</p> <p>I'm X from the Centre for Health and Disability Assessments and I would like to speak to Mr/Mrs/Miss/Ms etc. (use Full Name of claimant)".</p> <p>"This is a message from the Centre for Health and Disability for Mr/Mrs/Miss/Ms XXXX. We have been</p>	<p>Ensure you are speaking to the customer</p> <p>How to record a message on an answer machine if</p>

<p><b>Answering machine</b></p>          <p><b>Identity Checks</b></p>	<p>If the customer is not available</p>	<p>trying to contact you to commence the appointment you agreed to on (date and time). I shall attempt to call back in xx minutes. Otherwise if you now cannot commence this appointment please contact our Help Desk on (local tel number)</p>	<p>the customer is not available</p>
	<p>Conduct an Identity check</p>	<p>"I just need to check I am speaking to the right person....</p> <p>Could you please tell me your:</p> <ol style="list-style-type: none"> <li>1. DOB</li> <li>2. NiNO</li> <li>3. Postcode</li> </ol> <p>"I am one of the Healthcare Professionals providing advice to the DWP on your claim to benefit, I need</p>	<p>It is essential to carry out an identity check to ensure you are speaking with the customer directly.</p> <p>Complete the POID 1 form (this will have been filled out by a CSR but we still need to confirm identity as per process.</p> <p>Highlight ‘telephone assessment’ on the form.</p>

	<p>Explain purpose of telephone assessment and consent to proceed</p>	<p>to get some details about your health problems and how they affect you day to day is this ok?"</p> <p>Are you somewhere where you can hold a private conversation and not be overheard? ‘Is there anyone else in the room with you? And are you on a speaker phone?’</p> <p>Note: If there is someone in the room, ask: “Can you give me their name and relationship to you?”</p> <p>Note: Remember to add their details into the social history.</p> <p>‘Are you happy to continue?’</p> <p>Do you have a glass of water to hand? If not, would you like to get one? I’m happy to wait. If the call is disconnected, I will call you back straight away.’</p> <p>Equally, if the call is disconnected at any point during our conversation, please keep the line clear</p>	<p>Ensure the customer is ready and prepared for the call</p> <p>This is an opportunity to assess if the customer is capable and willing to continue the call.</p>
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<p><b>Step 2: Empathetic Listening</b></p> <p><b>Step 3: Building Rapport</b></p>	<p>Develop a 'relationship'</p>	<p>and I will call you back. If I cannot get hold of you on this number, do you have an alternative number I can call?</p> <p>The Department for Work and Pensions (DWP) has temporarily suspended all face-to-face assessments for health and disability-related benefits. This is to protect people from unnecessary risk of exposure to coronavirus (COVID-19) during the current outbreak.</p> <p>As an interim measure, we are doing Work Capability Assessments by telephone. We may not be able to get as much information as we could from a face-to-face assessment and we may not get enough to make a recommendation. However, we are doing our best to make recommendations where possible.</p> <p>The purpose of this call is to identify people who should be getting a higher rate of benefit, where we can. Please be reassured that you will not lose your benefit as a result of this call.'</p>	<p>Allow the customer time to talk, express their feelings and frustrations. They may have been isolated for some time</p>
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		“How have you been recently?”	and/or struggling with ill-health
<b>Step 4: Assess capacity (obtain consent)</b>	Identify if the customer has the capacity to proceed	<p>Note: As you open and progress through the call (greeting, identity check, opening the conversation) use your clinical expertise to assess if the customer has capacity to continue with the call.</p> <p>If at any stage the claimant is not happy to proceed the call should be terminated and ESA/UC 85A min completed detailing the circumstances.</p> <p>If any claimant is unreasonable or verbally aggressive on the phone this is unacceptable and the standard processes should be followed.</p>	
<b>Step 5: Set expectations, and reaffirm consent</b>	Clarify the purpose of call, how long it will take, and what will happen after the call ends.	“During this call I will be typing as we go along and collating what you say. This is to ensure I have accurate details of your medical conditions and how they affect you on a daily basis.	Clarify and establish expectations for the call.

		<p>It is likely you will hear me typing during our conversation. If it is difficult to hear me, or you need me to repeat something, please let me know.</p> <p>The call should take around one hour to complete. If at any point you need to take a break, please let me know, I am happy to wait.</p> <p>At the end of this call, I will summarise what we have discussed and write up a report for you.</p> <p>Are you happy to continue?"</p> <p>Note: If the claimant is not happy to proceed the call should be terminated and ESA/UC 85A min completed detailing the circumstances.</p>	<p>This provides an additional opportunity to assess if the customer is capable of continuing the call and they wish to continue the call.</p> <p>If the answer to either of these questions is the file will be returned to the BSC for assessment at a later date.</p>
<b>Step 6: The Assessment</b>	Obtain information as you would during a face-to-face assessment:	The format of the assessment will be the same as face to face but you will need to adapt your questioning style as per the workshops.	To gather medical information to allow you to complete the assessment.

	<p>Medical conditions, condition history, social/occupational and Typical day</p>	<p>Summarise regularly to make sure you have accurate information.</p> <p>You may have to adapt you normal questioning style.</p> <p>If you do not get a response you may need to;</p> <ul style="list-style-type: none"> <li>• repeat the question</li> <li>• check if the customer heard you</li> <li>• check that they understood the request</li> </ul> <p>Use your listening skills to pick up non-verbal cues: is the customer breathless, do they sound tired/fatigued, can you hear them moving around as if they are in pain. Listen to the tone of their voice for pain, fatigue and breathlessness.</p> <p>Listen to what's <u>not</u> being said as well. For example, are they saying they are well, but they sound unwell? Gently probe into this area – for example “You sound sore, what have you done today and have you taken your medication?” Remember reliably, repeatedly and variability.</p>	<p>To ensure you are applying a logical approach to history taking and the customer experiences a smooth journey.</p>
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		<p>You may pick up noises in the background, someone asking them if they are ok.</p> <p>Although we cannot do formal observations we can still document how they sounded.</p>	
<b>Dealing with an emergency situation</b>	Identify any immediate concerns	<p>As per any clinical situation you may identify an immediate concern.</p> <p>If the customer sounds clinically unwell and you have immediate concerns i.e., chest pain, short of breath that is different from normal then you may have to phone for an ambulance.</p> <p>If you have immediate concerns about their mental health and feel they are in imminent danger, i.e. voicing current suicidal intent with a firm plan you will have to phone for an ambulance and possibility involve the police.</p>	<p>To follow process if there are any concerns regarding the customers' health</p> <p>To ensure the customer gets a fair and accurate assessment.</p> <p>If this occurs the case will not be actioned and the case will be returned to the BSC for appointment at a later date.</p> <p>Please fill in a UE1 to let the GP surgery know what has happened and</p>

			add an FRR4 or advice minute to file to explain situation.
<p><b>If you are unable to proceed with the call due to customer behaviour or concerns regarding understanding during call.</b></p> <p><i>This will be a very rare occurrence as cases will have been sifted prior to identifying them for telephone assessment</i></p>	<p>Try all normal de-escalation techniques explaining why you are calling and what your expectations are during the call.</p>	<p>If the customer displays unacceptable behaviour on the call and you have not been able to de-escalate you will need to terminate the call and follow the normal UCB process. This would also include if you feel the customer is intoxicated or under the influence of drugs.</p> <p>If you have concerns over the customers' level of understanding and do not feel they have the capacity to give you the level of detail you need to complete the call you will need to terminate the call and explain to them that they will be assessed at a later date. You may have to give this detail to a 3<sup>rd</sup> party, unless they have an appointee with them during the call.</p>	<p>To follow process if the customer's behaviour is unacceptable or you feel you cannot get an accurate picture of the level of disability.</p> <p>To ensure the customer gets a fair and accurate assessment.</p>
<b>Step 7/8/9:</b>	Close the call, explain next steps, questions	Thank you for your time today	To ensure you have covered all the salient points of the assessment,

Closing the call		<p>I have asked all the questions I need to ask in relation to your assessment</p> <p>Do you have any questions you want to ask me?</p> <p>Following this call, your report will be reviewed and you will be contacted by letter in relation to the next steps.</p> <p>As I said at the beginning, the purpose of this call is to identify people who should be getting a higher rate of benefit where we can. When I review your report, I may not be able to make a recommendation about your capability to work without seeing you face-to-face. If this happens, <b>you will continue to be paid your current rate of benefit</b> and we will invite you to a face-to-face assessment as soon as we can once they resume. <b>Please be reassured that you will not lose your benefit as a result of this call.</b></p> <p>In the meantime please do not hesitate to contact the DWP if there is a change in your circumstances, for example if you have a new health condition or if there is a change in your existing condition.</p>	<p>and the customer understands what will be summarised in their report.</p> <p>Give the customer an opportunity to discuss</p>
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		<p>Is there anything further you would like to discuss before I end the call?</p> <p>Thank you again for the time today.</p>	<p>anything else on their mind, or that they want to share with you. Customers sometimes say they feel 'rushed' at the end of an assessment, so give them extra time.</p>
<b>Step 10: Follow up</b>	Complete any further procedural issues – UCB, Unexpected Findings, Safeguarding, Follow up/Welfare	<p>If any UCB issues have been identified during the call <i>but</i> you have been able to complete the call – follow the normal UCB process.</p> <p>If you believe a UE1 is required, ensure you have explained this to the customer and obtained consent, where possible. Refer to the UE1 guidance located on the intranet for full scope. For any unexpected findings that did not require immediate action - follow UE1 guide.</p> <p>If any Safeguarding issues have been identified during the call – follow the Safeguarding process and raise with your QAL.</p>	<p>Ensuring we are completing the follow up needed in order to protect our customers.</p> <p>Following the call you may want to reflect on the call and make sure you have completed any necessary follow up.</p>

		<p>Remember we are working in unprecedented times; customers may be reluctant to phone their GP so you may pick up incidental findings.</p> <p>Any welfare issues during COVID 19, social isolation, lack of basic essentials and concerns for vulnerable customers may require a follow up – use guidance from QAL support. If a claimant reveals details such as extreme financial difficulties where the DWP may be able to assist, please notify the DWP – follow the procedures outlined in “Protocol for Illness VCC” available on the knowledge library.</p>	
<b>Step 11: Post call</b>	Take a short break before your next call	<p>Take a few minutes to:</p> <ul style="list-style-type: none"> <li>→ Get up and move around</li> <li>→ Stretch</li> <li>→ Make a drink</li> <li>→ Anything else</li> </ul> <p>...before you prepare for the next call</p>	Looking after yourself = looking after your customers

## APPENDIX B: Communication Styles Questionnaire

Complete the questionnaire by selecting the response that is most like you from the three options and recorded the number of the chosen response in the Answers column. If none of the responses are at all like you please give the Answer column blank.

	Question	One	Two	Three
1	When operating new equipment for the first time I prefer to	read the instructions	listen to or ask for an explanation	have a go and learn by 'trial and error'
2	When seeking travel directions I..	look at a map	ask for spoken directions	follow my nose or maybe use a compass
3	When cooking a new dish I..	follow a recipe	call a friend for explanation	follow my instinct, tasting as I cook
4	To teach someone something I..	write instructions	explain verbally	demonstrate and let them have a go
5	I tend to say..	"I see what you mean"	"I hear what you are saying"	"I know how you feel"
6	I tend to say..	"show me"	"tell me"	"let me try"
7	I tend to say..	"watch how I do it"	"listen to me explain"	"you have a go"
8	Complaining about faulty goods I tend to..	write a letter	Phone	go back to the store, or send the faulty item to the head office
9	I prefer these leisure activities	museums or galleries	music or conversation	physical activities or making things

10	When shopping generally I tend to..	look and decide	discuss with shop staff	try on, handle or test
11	Choosing a holiday I..	read the brochures	listen to recommendations	imagine the experience
12	Choosing a new car I..	read the reviews	discuss with friends	test-drive what you fancy
13	Learning a new skill	I watch what the teacher is doing	I talk through with the teacher exactly what I am supposed to do	I like to give it a try and work it out as I go along by doing it
14	Choosing from a restaurant menu..	I imagine what the food will look like	I talk through the options in my head	I imagine what the food will taste like
15	When listening to a band	I sing along to the lyrics (in my head or out loud!)	I listen to the lyrics and the beats	I move in time with the music
16	When concentrating I..	focus on the words or pictures in front of me	discuss the problem and possible solutions in my head	move around a lot, fiddle with pens and pencils and touch unrelated things
17	I remember things best by..	writing notes or keeping printed details	saying them aloud or repeating words and key points in my head	doing and practising the activity, or imagining it being done
18	My first memory is of	looking at something	being spoken to	doing something
19	When anxious, I..	visualise the worst-case scenarios	talk over in my head what worries me most	can't sit still, fiddle and move around constantly
20	I feel especially connected to others because of	how they look	what they say to me	how they make me feel









21	When I revise for an exam, I..	write lots of revision notes (using lots of colours!)	I talk over my notes, to myself or to other people	imagine making the movement or creating the formula
22	When explaining something to someone, I tend to..	show them what I mean	explain to them in different ways until they understand	encourage them to try and talk them through the idea as they try
23	My main interests are	photography or watching films or people-watching	listening to music or listening to the radio or talking to friends	physical /sports activities or fine wines, fine foods or dancing
24	Most of my free time is spent..	watching television	talking to friends	doing physical activity or making things
25	When I first contact a new person..	I arrange a face to face meeting	I talk to them on the telephone	I try to get together to share an activity
26	I first notice how people..	look and dress	sound and speak	stand and move
27	if I am very angry..	I keep replaying in my mind what it is that has upset me	I shout lots and tell people how I feel	I stomp about, slam doors and throw things
28	I find it easiest to remember	Faces	Names	things I have done
29	I think I can tell someone is lying because..	they avoid looking at you	their voice changes	the vibes I get from them
30	When I'm meeting with an old friend..	I say "it's great to see you!"	I say "it's great to hear your voice!"	I give them a hug or a handshake









<b>TOTALS</b>	<b>Underneath each column please enter the number of times you choose this option</b>			
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## Appendix C: Resource Toolkit:

Type of Resource	Communications Focus	Link/Location
	<b>Communication Skills</b>	
	Channel - Communication Essentials – courses, books and audiobooks	Percipio Digital Platform
	Video - Telephone Customer Service: Minding Your Tone	Percipio Digital Platform
	Video - Telephone Customer Service: Focusing on the Customer	Percipio Digital Platform
	Video - Telephone Customer Service: Mirroring Language	Percipio Digital Platform
	Course - Interacting with Customers	Percipio Digital Platform
	Communication Skills World – various articles	<a href="http://www.communicationskillsworld.com/communicationskills_tips.html">http://www.communicationskillsworld.com/communicationskills_tips.html</a>
	The Total Communicator – There's a message in your voice – how to use your voice effectively	<a href="http://totalcommunicator.com/vol2_3/voicemessage.html">http://totalcommunicator.com/vol2_3/voicemessage.html</a>
	Bradford VTS Consultation Skills Telephone Consultations	<a href="https://www.bradfordvts.co.uk/communication-skills/telephone-consultations/">https://www.bradfordvts.co.uk/communication-skills/telephone-consultations/</a>
<b>TED</b>	Celeste Headlee – 10 ways to Have a Better Conversation	<a href="https://www.ted.com/talks/celeste_headlee_10_ways_to_have_a_better_conversation?language=en">https://www.ted.com/talks/celeste_headlee_10_ways_to_have_a_better_conversation?language=en</a>
<b>TED</b>	Julian Treasure – How to Speak so that People want to Listen	<a href="https://www.ted.com/talks/julian_treasure_how_to_speak_so_that_people_want_to_listen?language=en#t-9928">https://www.ted.com/talks/julian_treasure_how_to_speak_so_that_people_want_to_listen?language=en#t-9928</a>

	<b>Questioning and Listening Skills</b>	
	Top Tips to Improve Listening Skills on the Telephone	<a href="https://www.callcentrehelper.com/ten-tips-to-improve-listening-skills-on-the-telephone-1534.htm">https://www.callcentrehelper.com/ten-tips-to-improve-listening-skills-on-the-telephone-1534.htm</a>
	Back to Basics – Listening Skills on the Phone	<a href="https://www.oralhealthgroup.com/features/back-basics-listening-skills-phone/">https://www.oralhealthgroup.com/features/back-basics-listening-skills-phone/</a>
	Channel – Listening – courses, books and audiobooks	Percipio Digital Platform
	Video - Telephone Customer Service: Showing You Are Listening	Percipio Digital Platform
	Julien Treasure – 5 Ways to Listen Better	<a href="https://www.ted.com/talks/julien_treasure_5_ways_to_listen_better?language=en">https://www.ted.com/talks/julien_treasure_5_ways_to_listen_better?language=en</a>
	Skills You Need –Listening Skills	<a href="https://www.skillsyouneed.com/ips/listening-skills.html">https://www.skillsyouneed.com/ips/listening-skills.html</a>
	The Power of Empathic Listening	<a href="https://www.google.co.uk/search?source=hp&amp;ei=LjyUXoQlqpZoifiQ-As&amp;q=The+power+of+empathic+listening&amp;oq=The+power+of+empathic+listening&amp;gs_lcp=CgZwc3">https://www.google.co.uk/search?source=hp&amp;ei=LjyUXoQlqpZoifiQ-As&amp;q=The+power+of+empathic+listening&amp;oq=The+power+of+empathic+listening&amp;gs_lcp=CgZwc3</a>
	Practical Tips for Effective Questioning and probing techniques	<a href="https://www.callcentrehelper.com/practical-tips-for-effective-questioning-techniques-9045.htm">https://www.callcentrehelper.com/practical-tips-for-effective-questioning-techniques-9045.htm</a>

## Document Control

### Summary Table

<b>Guide Title</b>	Managing Performance		
<b>Approval Date</b>	22/04/2020	<b>Review Date</b>	22/04/2020
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### Document History

Date	Document Version	Document Revision Description	Revision Author	Approver
09/04/2020	V0.1	Initial version	H. Reen	KM and DA
20/04/2020	V.02	Review	T&D Partners	S. King

### Useful Contacts

Contact	Email	Phone

### Additional Resources

- n/a