Activity 2.1   How to Establish Rapport

Purpose
The purpose of this activity is to identify and explore the skills and strategies used to build and maintain rapport and a trusting relationship with a client.

Who should participate?
Especially important for all clinic staff because it is about basic communication skills, rapport building and establishing a welcoming and accessible clinic environment.

Time
15–20 minutes

Preparation
Review the following:
- Module 2 Preview & Preparation
- Activity 2.1 Handouts

Materials

Handouts:
Make one copy for each participant (or re-use copies printed for Module 1):
- Contraceptive Counseling Process Guide
- Principles for Providing Quality Counseling (optional)

Supplies:
- Large paper to stick/tape to the wall — 3 sheets, labeled with “Look,” “Voice,” and “Beginning”
- Markers

Resources
Have at least one printed copy available for reference:
- Providing Quality Family Planning Services (QFP): Recommendations of CDC and OPA, Appendix C
Detailed Instructions

1. **Introduce the activity:**

   *The purpose of this activity is to talk about how we welcome and develop rapport (both verbally and non-verbally) with our clients. We know that how we communicate with our clients is essential to providing high quality and consistent contraceptive services. This activity will give us a chance to talk about how we do this and will set the stage for talking about a communication model (called OARS) that gives us a short checklist on using communication skills and how to use these skills with intention.*

2. **Lead a group brainstorm** about specific ways to welcome a client.

   Have participants call out responses to each of the questions in *bold.* (If participants are struggling to come up with ideas, you might also ask the bulleted questions underneath.)

   **Encourage specific responses.** For example, if someone says “look welcoming,” ask, “Exactly, what does that look like?”

   As participants respond, **take notes on the large papers** you prepared.

   **How do you look?**
   - Is your body relaxed?
   - Do you smile easily?
   - What mannerisms are you aware of that might distract? (e.g., hair twisting, leg bouncing, etc.)
   - What does your face look like when you are concentrating?
   - How would you describe your “professional” appearance?
   - How do you show that you are listening? (e.g., nodding, appropriate eye contact, etc.)

   **How is your voice and voice tone? (in person and on the phone)**
   - Are you speaking clearly? Slowly, so others can understand you?
   - Are you speaking gently and softly (confidentially)?
   - Do you avoid using slang (e.g., “whatever…”)?
   - Do you explain any abbreviations you use?
   - How do you show that you are listening? (e.g., restating what you heard from the client)

   **How do you begin your client interaction? (in person and on the phone)**
   - How do you introduce yourself?
   - What words of welcome do you use? (“How can I help you today?”)
   - What questions do you ask?
   - How do you ask these questions?
   - How do you show respect?
   - How do you build trust?

---

**At a Glance**

**Introduction**

*Purpose:*
- Developing rapport
- Verbal and nonverbal
- Communication is an essential part of high quality services

**Brainstorm**

How can you greet or welcome a client?

**How do you look?**

- Look

**How is your voice/tone?**

- Voice

**How do you begin?**

- Beginning
3. **Lead a group discussion** about ways to assess and improve your rapport-building skills.

   - How can we — as individuals — assess how we’re building rapport through our nonverbal signals, our words and our voice tone, and the messages we communicate at the start of a client interaction?
   - How can we — as a team — help each other improve our rapport-building skills? How can we give and receive feedback in this area?

4. **Review the “Beginning” section of the Contraceptive Counseling Process Guide.**

   Note that the bulleted list in that section includes rapport-building strategies like those the group just brainstormed, as well as skills related to the OARS model, which you’ll go over in the next activity.

   **Trainer Tip:** Activity 2.2 The OARS Model — Essential Communication Skills will offer a simple framework of skills that can help participants build a trusting relationship with clients.

   Ask participants:

   **Why do you think the Process Guide says that these communication skills are for the “Beginning (and throughout)”?”**

   Pause for responses.

   *Establishing rapport is something that is important for us to do intentionally at the beginning of a visit, and then continue to do throughout. If we take time in that first moment when a client walks in the door to invest in the relationship and build rapport, that investment will pay off throughout the visit as a client becomes more comfortable in sharing their needs and goals.*

   However, it is possible to lose trust that you initially built, which is why it’s important to apply good communication skills throughout the visit to help maintain rapport and a trusting relationship.

5. **Wrap up the activity,** sharing summarizing comments such as:

   *This quick activity was aimed at describing and clarifying the qualities and skills we use when greeting and welcoming our clients. Could you each share with the group one specific way you intend to increase your skills in building rapport?*

   Remember: our non-verbal actions and voice tone are an important part of effective communication.
Contraceptive Counseling Process Guide

### Process

#### Beginning (and throughout)

**Establish and maintain rapport with the client**
- Warmly greet the client by name and introduce yourself
- Be genuine, showing respect and empathy
- Ask about the client’s reason(s) for today’s visit, plan and prioritize visit
- Explain private and confidential services
- Ask open-ended questions
- Respectfully affirm what you see and hear (showing interest, support and cultural awareness)
- Show that you care by listening (verbally and non-verbally)
- Reflect on what you observe and hear, to gain a deeper understanding
- Summarize key points throughout with a focus on the client’s goals
- If using EMR, position the monitor to keep eye contact

#### Middle

**Assess the client’s needs and personalize discussions accordingly**
- Review and update the medical, sexual and social history
- Explore client preferences regarding method characteristics: frequency of use, effectiveness, how to use, menstrual changes, side effects, and benefits
- Ask about client knowledge and experience with birth control methods
- Address pregnancy and parenting intention/ambivalence along with STD/HIV protection
- Respectfully explore client beliefs and feelings, including ethnic, cultural, and/or individual factors that may be relevant to their birth control method decisions and method use

**Work with the client interactively to establish a birth control method plan**
- Ask open-ended questions about concerns or possible barriers relevant to method choice
- Explore the client’s method preferences, and if appropriate, offer additional information about the most effective methods
- Help the client to optimize method choice by assisting the client in aligning their preferences with their method selection
- Reflect back important thoughts or feelings you hear from the client and/or feelings you sense from the discussion
- Clarify partner involvement and the role of others who may be important to the client’s decision making and method use
- Affirm and support the decision making process with a respectful, nonjudgmental approach in helping the client make a plan

**Provide information that can be understood and retained by the client**
- Provide balanced, unbiased, tailored information about method characteristics in an interactive conversation
- Provide accurate information (correct use, effectiveness, benefits, side effects, potential risks, STD/HIV protection)
- Use clear, understandable words, images, materials, models and/or sample methods
- Use numbers and comparisons that are easy to understand
- Assess and address myths and misinformation in a respectful and affirming way
- Include information about STD protection and emergency contraception

#### Closing

**Confirm client understanding**
- Ask the client to tell and show what was learned (teach-back) and provide additional information, as needed
- Address any possible barriers to a successful plan and method use
- Confirm the client’s plan for correct method use and follow-up, including what to do if dissatisfied with the method, back-up method, and emergency contraception, as needed
- Provide contact information and future opportunities for follow up, other methods or services
- Summarize with key points and provide a friendly close
Principles for Providing Quality Counseling

Counseling is a process that enables your client to make and follow through on decisions. Education is an integral component of the counseling process that helps clients make informed decisions. Providing quality counseling is an essential component of client-centered care.

Your client is the primary focus when providing counseling related to reproductive and sexual health decision making about preventing or achieving pregnancy and supporting healthy behaviors. Using client-centered skills, you tailor the interactive counseling and educational encounter to meet the unique and culturally appropriate needs of your client.

**PRINCIPLE 1:**

Establish and maintain rapport with the client

- Create a welcoming environment — greet the client warmly, show you care. Listen to and engage your client by asking open-ended questions. Explain privacy and confidentiality to help build a climate of safety and trust that will encourage questions at every stage of the client encounter.

**PRINCIPLE 2:**

Assess the client’s needs and personalize discussions accordingly

- Tailor your questions and conversation so that your client’s clinical needs, personal life considerations and psychological concerns are integrated into important education and decision making discussion.

**PRINCIPLE 3:**

Work with the client interactively to establish a plan

- Address your client’s personal goals by interactively exploring decision making and readiness for behavior change if needed. Help establish a plan that will allow the client to achieve personal goals.

**PRINCIPLE 4:**

Provide information that can be understood and retained by the client

- Provide an opportunity for your client to learn medically accurate information that is balanced, nonjudgmental and in accordance with your client’s plan at this time in her or his life.

**PRINCIPLE 5:**

Confirm client understanding

- Use an interactive teach-back process to give your client an opportunity to say — in his or her own words — the important information shared during the encounter. The goal of using a teach-back approach is to clarify any client misunderstandings to ensure your client’s success in their reproductive health choices.

Source: Providing Quality Family Planning Services: Recommendations of CDC and the U. S. Office of Population Affairs, 2014; Appendix C