

Counseling for Business & Industrial

Telephone Counseling

10.1 History

Telephone and telephony go back to 1876, to the patent obtained by Alexander Graham Bell for the electronic transmission of sound to a distance. He made the telephone a well-known and reliable instrument and medium. The novelty nowadays intervenes with options such as: teleconference, dial-up Internet, caller ID, market competition regarding the calling rates, etc.

Telephone counseling has a tradition going back to emergency medical calls. Such professional communication was used in cases when: · no direct emergency medical assistance can be offered;

- 1) the doctor must change the course of treatment for patients at a distance;
- 2) experts outside the region or country must be consulted on urgent matters;
- 3) triage.

Since competition and the attempt to break the state monopoly on infrastructure and services causes a continuing drop in the costs of telephone calling facilities in more and more countries all over the world, medical telephone counseling proves its efficiency today as ever.

Another element marking the development of this sector is the emergency psychiatric help, launched in 1960 with the suicide hotlines. They were then and still are today highly efficient. Shortly after, the hotlines were made available for rape victims. If in emergency situations specific social intervention instruments were created, career counseling has also extended its sphere towards alternative means and practices for the benefit of clients proactively making their way in life, who are in psychological difficulty, emotional impasse, in need of information regarding the world of education, training and labour, etc.

When AIDS spread in the United States in the beginning of the 1980s, AIDS Hotline was founded in California, operated by volunteer agents, to inform and guide the victims of the disease. Ever since, the Public Health Department in San Francisco signed a contract with the new organization, so that it would also offer limited educational services. This was the birth of TDD (Telecommunications

Device for the Deaf) with separate telephone lines for Hispanic and Haitian clients. The number of calls made in 2005-2006 was no less than 70,000.

In the UK there is Learndirect – a service using a call centre and web technologies in communication regarding training, career and business for young people over 16. Teleconference is rather widespread in the UK in the rehabilitation programmes for young people who have committed crimes and are serving a sentence in prison. Before being released, they meet with a personal counselor who will coach them back in civil life (CNROP, 2005). Total control on behalf of the authorities is replaced by the presence of the counselor, already in the detention centre, who helps the young people re-enter social and vocational life.

The Hessen Land in Germany has recently opened in Giessen the first regional telephone centre for clients *KuZ – Kundenzentrum* (in *Bundesagentur für Arbeit – The Federal Employment Agency* – www.arbeitsagentur.de/). *KuZ* tackles over 80% of the requests that would have been otherwise addressed one-on-one with counselors in the agency (information on facilities for the unemployed, appointments for individual counseling sessions, etc.); counselors are thus freed of administrative and/or routine tasks and can deal with individual cases coming to the centre.

10.2 Theoretical Background

Part of the family made of media and technologies for distance communication, telephone counseling stands out by a series of characteristics describing it as an accessible, relatively inexpensive method requiring a certain protocol / language on the part of users, and that can be applied at variable time moments: previously, during or consecutive to direct meetings between the counselor and client.

Telephone has found its maximum practical efficiency in other fields than psychological or vocational counseling. Entire sectors in television and radio industry, sales and advertisement have been taken over by operators trained to manage the relationship with beneficiaries over the telephone. This is why we watch or listen to interactive shows (information, talk shows, entertainment) where just because the caller is paying for the call makes him/her entitled to expressing an opinion and to expecting satisfaction. In fact, by merely dialing, the caller admits to the importance, the means and rules of the interaction proposed.

The living space of modern people is populated by many preoccupations, among which the essential and permanent ones (career, private life, social circle) require physical presence; for the past decades, progress has been made – hard to imagine

occasionally – in promoting a kind of involvement from a distance, giving the possibility of covering several areas of activity without actually attending in person the human gatherings.

Examples of this kind are e-commerce, tele-shopping, self-employment, online matchmaking. Guidance counselors renew their communication channels with clients without forgetting the relevance of direct relationships. In case the client's home is far located from public institutions that could help solve his/her needs, or maybe going there in person even for one single time would pose insurmountable difficulties, or there is a personal reluctance to engage on troublesome matters with a perfect stranger, telephone counseling is the answer. We are not implying telephone counseling to be superior to traditional methods; it is merely an **alternative** with proven pragmatic effects in a number of situations.

Cognitive research by Broadbent (1958) shows that in processing information the cortex acts as a unilateral communication system when input level or intensity to a certain receptor surpasses the impulses transmitted to other receptors. What happens is that the brain temporarily retains information on all the stimuli, which rapidly erode at the impact with the consciousness level and can be stored for further recovery only by the short-term memory.

Lester (1995) proved that the tendency to reduce visual exchanges between the counselor and the client is not new. In traditional psychoanalysis, the helpers place themselves outside the clients' view, which also means that the persons "on the couch" do not see them. Similarly, the confessional in the Roman Catholic Church requires the physical separation of the priest from the person coming for a confession. The parallel is that the lack of direct physical presence of the two interlocutors better safeguards the person's intimacy and only the problem itself is submitted to common attention.

10.3 Method Presentation

Telephone counseling yields results in a series of contexts such as: *depression, job abandonment, stress, grieving, anxiety, low self-esteem, sexual dysfunction, alcohol, tobacco and drug abuse, obsessions, post-traumatic disorder, transition difficulties, relational discomfort at workplace, anger management, parental approach to child discipline, life style counseling.*

Sometimes an assessment of medication treatment may be needed beforehand (e.g.: anti-depressives), followed by a referral to a specialist. There is even a telephone counseling procedure that is part of weight losing programmes; clients

who purchase various slim products (extremely costly) benefit from the “free advice” of a personal trainer. The relatively large number of web sites promoting / “*guaranteeing*” successful interventions in these situations speak of the public impact of psychologists and therapists who have changed their way of performing to include telephone counseling (with technological aids like the e-mail, voice-mail, or their own Internet page for appointments).

The first contact over the telephone is conditioned by paying the supplier, either by credit card or *PayPal* (www.paypal.com/), bank transfer or *Moneybookers* (www.moneybookers.com/app/). In order to protect individual privacy and also to ensure tax deduction for telephone counseling, some counselors recommend to clients not to declare “*mental health services*” on the annual income statement, but the name and contact information of the practitioner. The advertisement sells a few free counseling minutes in a telephone service package, the cost of which varies between 40-100 USD an hour.

A client seeking telephone counseling may be a person who has already been met with a counselor and feels safe to use the latter’s expertise again. If the first contact was made in a climate of trust and openness, then the client will feel free to come back and prefer a certain counselor or approach.

In principle, the counselors will try to structure any telephone session into the following 6 stages:

- 1) Greeting – after about 3 rings (giving the client time to get used to the idea of making a valid telephone call and at the same time giving the counselor the certainty that the client really intends to call), the counselor will pick up and introduce himself/herself in connection to the counseling organization.
- 2) The counselor’s voice should be natural, calm and firm, with good and distinctive pronunciation adapted to the caller’s rhythm of speech and problem, with his/her contribution should not exceeding the client’s, except perhaps in the case of shy or hesitant clients. The counselor thus conveys the idea of appropriate place and interlocutor for a caller unaware of what / who is there at the other end.
- 3) Information – identifying the client type and needs, making priorities and defining the problem.
- 4) Discussion – unfolds after a protocol meant to encourage clear and concise expression, tracing the origin and evolution of the issue up to the present

moment, assessment of options, formulating arguments pro and con in relation to the options that appear valid, identifying the persons and organizations that could be used as a resource for the procedure intended. Key moments promoted by trainers in marketing for *telephone coaching* can also be adapted to telephone counseling at this stage: starting from the **situation** stated by the client, the ideal and reasonable **aims** are set, the necessary **process** is outlined and then the success is **assessed**.

- 5) Temporary agreement – a framework is formulated for further communication, the details of the next contact, the steps for the client to take in the sense agreed during the conversation, and possible future action.
- 6) Ending the conversation – just like in the first stage, it is good to be moderately emotional to convey the client a sense of comfort, reliability, and self-trust.

The contents, duration and methodological requirements mentioned above for each stage are situational and extremely flexible, according to the circumstances of the call being initiated, the client's personality, the practitioner's style, the nature of the problem, the urgency and complexity of the solution, or other factors.

The information disclosed by the client should be written down as it is given, right during the call; in difficult case however the counselor may take notes after the call, based on the recording. No one calls a counselor to hear a message of the kind they use in customer service: *"To improve the services we provide for you, this conversation may be recorded. Your holding the line represents your agreement with the procedure."* Clients seek non-uniform, individualized treatment, alternatives, new ideas, reversed perspectives, denying a suspicion or double-checking on a supposition.

The private and apparently anonymous nature of the telephone exchange is the most distinctive aspect of the method. Monitoring telephone counseling is absolutely necessary to ensure quality in a demanding and restrictive professional environment. Audio and/or video recording of the practitioner at work make reference materials (with a special status) for team learning, collegial help, expert consulting. Other instruments of asserting the client satisfaction with the service received (e.g.: questions at the beginning or end of a new conversations, questionnaire sent by (e-)mail, feedback from significant others) complete the image of the practitioner's telephone competence. Internal assessment in the

counseling organizations offering exclusive telephone service or integrated with face-to-face counseling must take place periodically (weekly is recommended), so as not to let accumulate a volume of work impossible to follow through.

On the average, counseling telephone calls last 9.6 minutes⁷. The most frequently asked questions (22.7%) refer to general information on certain work sectors, and then less and less for help with materializing certain ideas, employment, support for already made decisions, assessment of alternatives, issues on other countries, implementing decisions.

The percentage of second calls is 38%. The data above must be read under the reserve that the practitioners who contributed to this statistics are not primarily telephone counselors.

10.4 Interpersonal Communication

In interpersonal communication, whether traditional or mediated, there are several conditions to be met (Dinu, 2004). We have adapted them for the use of telephone counselors. According to the data collected by a research made for the “Distance counseling by telephone” project, on a sample of 230 practitioners in eight European countries.

- 1) ***Frankness*** – the counselors must act in honesty, not conceal the fact that only partial or no help might be provided, be consistent with the employer’s policy and leave no room for misunderstanding.
- 2) ***Helpfulness*** –the counselors should express the intention to offer help, with an energy that goes beyond formal politeness and actively moves in client’s favour.
- 3) ***Empathy*** – being one with the client regarding the psychic (thoughts, feelings, will). This allows the counselors to understand their interlocutor sooner and better, not to judge and find the arguments that are likely to resonate with the each particular client.
- 4) ***Positive attitude*** – in terms of unconditional offer of professional help, encouragement of self-confidence, positive feedback, assessment of how the client has reacted to what has been said so far.
- 5) ***Equality*** – the two interlocutors must communicate from compatible positions, as well as contribute equally to the dialogue.

The fact that non-verbal elements are completely shut out in telephone counseling, what is essential is the language and the way the practitioners use it to maximize

the counseling effort. Personalizing elements of the counseling discourse in this case are:

- 1) Key-words, accents, silence, interruptions, sighing.
- 2) Paraphrase, summary, helpful phrases.
- 3) Questions – that must be asked according to the client's personality: if timid, confused, aggressive, discouraged, undecided or else the counselor may ask warming-up questions, clarification, motivating, reflexive, focused, descriptive, alternative, control questions, but not too many at the time or not too insistent so as not to give clients the impression that pressure is being put upon them.

Since web service companies (e.g.: *Yahoo, MSN, Google*) have recently introduced instant voice messenger, individual and group web counseling sessions can be held. Preliminary conditions: both / all partners have a chat user account, are present at the same time in front of a computer, have headphones and microphone, are able to type and use the programme and be interested in abstract, virtual interaction.

10.5 Career & Professional Development

The range of counseling services has diversified as a consequence of the more sophisticated needs of the target groups. Career and professional development is an increasingly important part of the life of modern people who are to a new society at a fast pace, the fundamentals of which are dissimilar even from that of a decade ago.

The changes on the workforce market (ageing, professionalization), as well as the emergence of new specialties in indirectly productive sectors (stock market, real estate speculations, multilevel marketing) make people require advice, guidance, information, counseling so as to improve the workers' professional role and status.

Traditional education and training cannot cover the plethora of opportunities that *pupils and students* have nowadays when deciding on continuing their education or taking up employment. This is why they can learn over the phone about the opportunities for grants, jobs, benefits and obligations related to their enrolment in a certain educational or professional programme, special requirements for access, throughout the programme or before the graduation. In addition, young people can be helped to better understand their current situation, perspectives and viable options.

Parents may call on behalf of young people undecided regarding what employment course to choose, whether in state-owned or private enterprises or institutions, whether to remain in the country or go abroad, about their compatibility with the position, motivation, satisfaction, income, etc.

Telephone counseling is also destined to *working adults* who desire a career adjustment and are in need of information on how to approach a certain employer, organizational culture in a given sector; the same, *people in need of a job* and who do not have access to other information sources, comparable experiences, and have no time or capacity to explore on their own, or are in psychological / emotional difficulty.

Management and administration staff may turn to counselors specialized in human resources. The advice expected is a personalized answer to urgent or postponed problems of those who must face new or unusual situations, on the condition they prefer to consult a third party rather than their direct supervisor or boss.

Examples, case studies, exercises

The caller is a young man who has found out that his position is about to be affected by a cutback. The young man is worried because he does not seem to be able to keep a job for long.

The counselor asks him about his marital status and his situation at home; she finds out that he is “the head of a family”, has two small children, rents his apartment and has loaned money for purchasing durables, such as home appliances.

The objective situation is that the company must give up the IT assistant position the client had earned a year before. The certificate obtained by taking specialty training and the professional certificate from the local technical high school had ensured this position, but there are no guarantees for him to be kept in the field.

The counselor wants to know what skills the young man has and what he likes to do outside his profession. The client mentions electronic repairs, and music industry as his hobbies, from which he has gotten satisfaction since adolescence. Emotionally, the young man blames himself for the insecurity of his family, he is afraid of his wife silent contempt for his failing to provide for them. He had hoped for more from his profession, he knows how fragile the labour market is in their town, but had considered that punctuality at work would recommend him for long-term employment or even promotion.

On the counselor asking him about his initiatives and contacts made at work, the young man realizes he has nothing, instead he has always obeyed to the existing protocols. The young man is aware of some talent in fields where innovation, unusual ideas, improvement suggestions are appreciated, features that bring astounding progress in electronics and music. It is then proposed that the young man turn from the IT sector to service for electronics and/or household appliances, or local disk jockey. Asked what benefits he expects from a next job, the young man says he expects similar social prestige and some financial stability. That ruled out the DJ idea...

The counselor recommends that in the next two weeks (along with his notice) he let people know (friends, former school mates) he is comfortable with that he is actively looking for a job. At the same time, he should carefully study the labour market (newspapers or websites he knows as an IT professional) and send his CV to envisaged employers. During this period, by telephone or in face-to-face appointment the client and the counselor will be able to discuss the structuring of a letter of intent and how the young man should conduct himself in an interview, once he retains advantageous offers.

Method Evaluation Advantages:

Telephone counseling offers the following advantages compared to face-to-face counseling:

- a) most homes or institutions have a telephone set ensuring access and call privacy;
- b) time saved by not going to the counselor's office, no need to arrange child care, to postpone personal obligations;
- c) avoiding possible embarrassment in meeting people who are not aware of the essence and benefits of counseling (e.g.: in the waiting room);
- d) opportunity of working with a specialist who is not otherwise available;
- e) costs for the client and counselor significantly below the face-to-face counseling (between 25 and 150% lower), more so with toll-free numbers;
- f) additional chance for physically disabled clients to benefit from counseling;
- g) for emotionally ambivalent personalities, with interaction difficulties, in need of keeping a safe distance, who feel justified or apparent guilt (Grumet, 1979). For them, the telephone is "a strategic combination of privacy and security";
- h) anonymity confers a secure framework for self-revelation and thought as well as emotional expression;

- i) for some clients there is an increased possibility to grow into exercising control over the counseling process, compared to the presence in an office and in the proximity of the counselor;
- j) taking part in TSG – *telephone support groups* – and including clients in self support networks;
- k) in some follow-up studies evaluating telephone counseling, most clients appreciated being listen to and getting feedback, understanding and compassion, support and unconditional guidance (Lester, 1995);
- l) quick appointment and delivery;
- m) flexibility of circumstances (in the comfort of one’s home, during lunch breaks, during car trip);
- n) clients receptive to the counselor’s methodology learn the approach and can take the steps to apply it adequately in solving other unpleasant life situations;
- o) ending the conversation in an action plan.

Disadvantages:

- a) inapplicable on clients poorly equipped or with no motivation for face-to-face confrontation or exchange;
- b) on the one hand the counselor loses the opportunity to impress clients by means of his presence or his office, diplomas, certificates and other references displayed, charisma, etc.; only the quality of the communication and the emotional impression prove the counselor’s competence;
- c) persistence in the common knowledge of a stigma attached to counseling or therapy, and to the people requesting such help directly or indirectly;
- d) impossibility to make sure of a client who seems to be in urgent need of hospitalization or treatment;
- e) difficulties in staying both involved in the case and critical of the service quality the counselor provides during telephone counseling;
- f) although the communication codes are known, information traffic cannot be controlled, nor can the final destination of the data exchanged through systems like *Skype*. Some European companies have already forbidden them from being downloaded or used, due to the virus threat;
- g) the risk that the counselor’s discourse might become conversational and lose its healing and formative role;
- h) the increased incidence of obscene or interrupted calls since the client does not feel obligated to hold on to a “*counseling contract*”.