



**Helplines**  
Partnership

# Responding to challenging calls

Support materials for EURORDIS  
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## Stages of the call process

### **Beginnings**

Establishing an appropriate helpline relationship with the caller



### **Exploration**

Enabling the caller to communicate the nature and purpose of the call



### **Clarification**

Checking with the caller that you understood what you've been told



### **Identifying next steps**

Discussing different options available and actions for each of you to take



### **Endings**

Finishing call to your satisfaction and that of the caller



### **After the call**

Looking after your own welfare and completing admin tasks before taking next call

## Active listening skills

<b>Active listening (phone)</b>	Ensuring the caller knows you are paying attention. Using appropriate “uhms” and “ahs” and other verbal cues.
<b>Questioning</b>	Asking appropriate open, exploring, closed and hypothetical questions. How and when you ask questions may be different over the phone and in written communication. In responding to emails, you may want to keep questions to a minimum to limit continued exchanges - you may need to ask clarifying questions but you cannot be sure that you will get a reply.
<b>Reflecting back</b>	Repeating back to the helpline user what they have said in <b>their own</b> words, mainly for an emotion. Used mainly on the telephone. You may in practice use some reflecting within a paraphrase (verbal or written). Reflecting back is limited in that it doesn't show the other person that you have necessarily understood them.
<b>Paraphrasing</b>	Repeating back the key points of the service user's issues and feelings they have expressed using <b>your</b> own words. A very important skill which is applicable and relevant to all helpline channels.
<b>Clarifying</b>	Checking you have understood, often by asking a question. You may need to ask some clarifying questions on any channel, although clarification may need to be presented in a different way where the communication isn't happening simultaneously.
<b>Summarising</b>	On a telephone call or IM, repeating what has been discussed or agreed up to this point in the conversation. This can help bring these contacts to a close.
<b>Exploring</b>	Using active listening, reflecting, paraphrasing and questioning to help a helpline user to explore their issues and concerns.
<b>Focussing</b>	Sensing the key issues for the helpline user and helping them to focus on these.
<b>Holding</b>	Enabling the helpline service user to feel safe to reveal feelings or disclose challenging information.
<b>Bracketing</b>	Putting one's own issues to one side while staying focused on the helpline user's issues.

## Active listening skills

You need to be clear about the context in which you are listening, the purpose of your service and your role within it. You will need to use a range of listening skills as well as asking appropriate open questions to help callers clarify their needs.

The key characteristics of good listening are:

- Setting your own experience, opinions and emotions aside and focusing on the caller's experience and feelings
- Focusing on what the caller is saying, not what you will say next
- Paying attention to the 'soundscape' – and not being afraid to be silent
- Checking out with the caller your understanding of what you are hearing and listen to their response to your assumptions
- Staying with painful, distressed feelings: simply being heard can be of value in itself
- Focusing on the person, not the problem – the speaker may not know what the problem is or the presenting problem may conceal underlying issues
- Not interrupting or finishing the caller's sentences
- Avoiding the jump to an instant solution. It's your job to help the caller to identify options for themselves. If asked 'what would you do?' by the caller, tell them that it would not help to say what you would do as your choices may be very different from theirs.

The key characteristics of good responding are:

- Using your voice as a tool in the 'soundscape'
- Using plain English, avoiding jargon, specialised or technical terms (unless the caller is using them) and avoiding words or phrases that are specific to a regional dialect
- Using appropriate questioning techniques
- Using reflecting back and paraphrasing skills to feed back the key points of the caller's situation and feelings
- Demonstrating acceptance of the perspective that the caller has. You do not need to agree with their views or their way of expressing them to show you understand where they are 'coming from'
- Being clear with the caller what you are doing if you need to put them on hold, and going back to them to let them know about any delay

- Allowing enough time depending on what you can realistically offer and, if appropriate, tell the caller how much time you have got to listen (eg if you need to bring the call to an end).

## Effective questioning techniques

On a helpline, questions should serve a purpose.

The key purposes of questions asked by helpline workers are:

exploration - enabling the caller to communicate the nature and purpose of the call.

clarification - that you have understood correctly.

Questions can be closed or open.

### Closed questions

Closed questions require a 'yes' or 'no' type answer (e.g. 'Is this question a closed question?') or a very limited range of responses (e.g. What day of the week is it?)

Closed questions help establish facts. For example, for particular agencies, it might be appropriate to ask:

*Do you have any children?*

*Is anyone else living in your home with you?*

### Open questions

Open questions will enable the other person to give an almost unlimited number of responses and to talk about specific experiences, behaviour and feelings. Open questions can assist the helpline worker to avoid making assumptions which can be implicit in closed questions. Open questions usually begin with one of the following words:

*How? What? When? Who? Where? Which? (Why?)*

Open questions are used for exploring facts and feelings:

*What can you tell me about...?*

*How long has this been going on?*

*When this happened before, how did you deal with it?*

*How do you feel about this?*

Open questions can also be used for clarifying:

*When you say...what exactly do you mean?*

Some open questions explore hypothetical situations:

*If you did tell him, what do you think would happen?  
If you do that, what effect do you think it would have?*

## What to avoid

Don't ask too many questions - keep questions to a minimum unless you are asking the caller for specific information or you need to get the caller to open up in order to give information. Be careful, however, about 'pushing' the caller to open up an area that he or she is not comfortable with discussing. If asked too many questions, callers may feel that they are being interrogated – try using reflecting back as an alternative prompt for them to say more, or using paraphrasing as an alternative means of clarification.

Avoid use of 'why' questions. Strictly speaking, these are open questions, but they can come across as judgmental (e.g. 'Why did you do that?'). Also avoid other questions which contain disguised judgments as the caller is likely to react to the judgment, not the question.

Finally, avoid asking leading questions. These are closed questions that imply a particular response from the caller - usually that the caller agrees with you!  
Examples of leading questions are:

*Didn't you find the side effects of the medication a problem?*

*Don't you find bringing up twins exhausting?*

*Weren't you afraid of finding out the results?*

## Your voice as a tool

As a helpline worker, you can make the most of your voice to make up for the lack of other non-verbal communication available on the telephone. This includes:

- Speaking, if you can, with a lowered volume, which can convey that you are trying to gain an understanding of their situation
- Using verbal encouragers or nods such as “mmm”, “uh-huh”, “yes” and “right” shows you are still there and listening without interrupting the caller’s flow
- Being aware of the speed at which you are speaking, and avoiding speaking too quickly, especially if you are reading out information
- Ensuring you are careful about the emphasis you put on certain words. For example, changing the emphasis on certain words when asking the question “What do you mean?” can alter its meaning entirely. In the same way, the phrase “that’s all I need” can sound positive if you emphasise ‘need’ but desperate if you emphasise ‘all’.

There may be some aspects of your voice that are difficult to control, so you should be aware that the following may irritate a caller:

- A voice which is monotonous, either being too low-pitched all the time or too high-pitched all the time
- A voice which varies too much in pitch and is too ‘sing-song’.
- Raising the pitch at the end of a statement as if you are asking the caller to check or agree with what you have just said
- A strong accent from a region or country may cause the caller to make inappropriate assumptions and judgments about you.

If a caller hears a lot of background noise, they may not be able to hear you properly or you them and it does not create an impression for the caller that they have are speaking confidentially. So you should also be aware of background noise in the helpline room. Ask your colleagues to reduce the noise they are making such as conversations. Look for ways of laying out the room so to give the most space between helpline workers, and keep printers, photocopiers, mobile phones and radios out of earshot.

## Responding to different types of service users

### Abusive callers

There may be occasions when it would be appropriate to end a call before it reaches a natural end. This is called 'terminating a call'. No helpline worker should have to deal with threats and abuse, and the caller needs to know that their behaviour is unacceptable. You should provide the caller with an opportunity to change the behaviour as in *"I am not able to continue with this call if you are swearing at me /being abusive/ threatening me"*.

If appropriate, invite the caller to continue and accept any apology offered. If the abuse continues advise the caller that you are terminating the call and do so: *"I am going to end the call now"*.

If appropriate and within your helpline's policy, tell the caller that they can call again but that, if they behave in a threatening or abusive way, then the call will be terminated again.

What you are trying to communicate to the caller is acceptance of them but not the behaviour.

## Working effectively with distressed service users

If a helpline user is very distressed, being a good listener can feel supportive even if the helpline worker feels they didn't 'do' anything.

When people are distressed, they may find it difficult to find the words to explain their situation and how they are feeling. In a telephone call or IM, it may take some time to establish a clear picture of the helpline user's situation and it is important to allow for this and to go at the service user's pace.

Being patient (on calls and IMs) and allowing the helpline user to let the emotion out is important. Interrupting may block the release or make the helpline user feel unheard, frustrated and possibly angry.

Helpline workers need to distinguish between the service user's feelings, what belongs to them, and how hearing the helpline user's distress makes them feel personally. As a helpline worker, it is important to develop awareness of how you react to distressed helpline users and your own limitations so you keep your own boundaries and can focus on the helpline user.

You will also need to be clear about the role and boundaries of your service for consistency. It may help to remind yourself that you are not the cause of their distress or responsible for their feelings.

### **Other skills include:**

- Giving verbal encouragers (e.g. 'mmm') on the phone in a soft voice. This will let the caller know you are with them.
- Acknowledging any evident distress. Conveying that you are aware of how distressed the helpline user is shows empathy. In written communication, it is vital to use sensitive but unambiguous wording and avoid potential misunderstandings.

- On the phone, if a caller apologises for crying, saying it's OK to let it out and that they can take their time.
- If appropriate, ask the helpline user what has triggered the distress and what has prompted them to make contact now.
- Don't ask too many questions. Trying to get too much information from the helpline user can make them feel their emotional state is being ignored. They may start to feel frustrated and angry.
- On calls and IMs, hold back from providing information or signposting on until you have given the service user a 'good listen'. Check that the helpline user actually wants to receive information.
- Don't answer any questions that a distressed person may understandably ask about what you would do in their situation. Steer clear of advice, instead focus on how they might deal with their situation.

It is good practice to discuss the communication with a colleague afterwards. Be aware that helpline workers will differ in terms of their reactions to exposure to distress and in response to different things they hear or read. Some may have a delayed reaction. They may not feel emotional at the time but feelings may filter through later on.

## Distinguishing between frustration, anger at worker/service and abuse

Many service users will feel angry about a situation they find themselves in. Many angry contacts arise because the service user feels powerless to resolve a situation or has tried unsuccessfully to resolve it. For example, an exhausted carer may feel that they have been given little or no support by statutory services. The carer could be feeling very frustrated by not being able to speak to the relevant people, feeling let down by services and feeling powerlessness in terms of getting their needs met. This may be expressed as impotent rage. An empathic approach that shows that the helpline worker has listened and understood their views and their frustrations and that doesn't take the anger personally may enable the service user to explore ways of getting their needs met more effectively.

However, a few people may just want to express their anger and do not necessarily want you to help them or to deal with their problem, even if you have the means to do so.

If a service user is angry with your helpline service for whatever reason, whether they have cause to be or not, then the service's complaints policy may be relevant. As with the above example, it would be important to give an angry helpline user a good listen so that they feel 'heard'. They may express anger with you as the representative of that service and it is important to distinguish between someone who is angry and someone who is actually being abusive and directing their abuse at you. In this circumstance, no helpline worker should be expected to put up with abuse and the helpline needs a clear policy that limits such behaviour (see below).

The aim is to identify effective strategies so that service users who are angry with their situation feel heard and don't turn their anger on you/the service or become abusive; to deal effectively with service users angry about the service; to manage abusive behaviour effectively.

## Strategies for managing anger in a phone call or IM

Keep calm yourself. Most callers who are angry will calm down eventually if you stay calm.

Let them 'let it out' and have their initial outburst, don't interrupt as this could turn the anger against you. Give the caller time to run out of steam or pause.

Respond only when the helpline user has paused or run out of steam - be prepared to take a step back if this is premature

Acknowledge what the caller is angry about using phrases like 'I can appreciate why you are so angry'

If the caller is angry with you or the service, do not be defensive – this may make the helpline user even angrier. Instead, offer an option for the user to take up contact with a supervisor or manager.

Explain what you **can** offer, whether it is looking something up or passing the caller on to someone else. It is better to offer more than one option.

In an email or SMS which expresses anger, use paraphrasing to acknowledge the emotional content.

## Strategies for managing abusive service users

Some helpline users may only be able to express themselves through language which may be offensive to you. The language we individually find acceptable and unacceptable will vary. But it is important to distinguish between a helpline user's ways of expressing themselves (e.g. swearing) and abuse that is directed at the worker. As part of a helpline's duty of care to its workers, no worker should be expected to put up with abuse.

It is important to reject the behaviour not the helpline user.

Formulas such as *I find your language/behaviour disrespectful. If you continue to use abusive language I am going to have to end the call/IM* can be helpful.

A warning gives the helpline user the option to change their behaviour. But if they do not do so, let them know you are going to end the conversation and then do so calmly.

It is important that all workers across the all channels of the service act in a consistent manner. A helpline user who has difficulty behaving appropriately may exploit any weaknesses in the service boundary.

## Support materials - Strategies for responding to different types of contacts (1)

Call type	Dos	Don'ts
A caller who is angry	<p>Allow time to let off steam.</p> <p>Once the caller calms down, focus on what the caller wants and expects and be clear about the limits of the helpline in relation to those expectations. Keep your voice lower and slower.</p>	<p>Start arguing with the caller</p> <p>Raise your voice to the caller – this is likely to make things worse</p>
A caller who is complaining about the service	<p>Give the caller the opportunity to let off steam.</p> <p>Acknowledge – using paraphrasing – that something has gone wrong and the impact of this. Ask open questions about what they were expecting and what went wrong.</p> <p>Ask closed questions to check facts and times.</p> <p>If appropriate, ask an open question about what the caller would like to happen.</p> <p>Facilitate - provide options for taking this forward in accordance with the helpline's complaints procedure. Depending on your service, you may be able to problem-solve if you have the resources and authority to rectify a specific problem.</p> <p>Thank them for the call and the feedback.</p>	<p>Interrupt or try to talk over the caller.</p> <p>Rush to the defence of the helpline and/or colleagues</p> <p>Question the validity of the caller's complaint</p>
A caller who is abusive	<p>This is different from the 'angry' caller.</p> <p>You should not as a helpline worker have to tolerate abuse.</p> <p>Make it clear that the behaviour is unacceptable - <i>If you continue to use abusive language, I am going to have to end the call</i>'. If the abuse continues, let the caller know that you are now going to end the call and end the call calmly.</p> <p>Get some support after the call.</p>	<p>Let the abuse continue.</p> <p>Become abusive back or start an argument.</p> <p>Hang up immediately.</p>

## Support materials - Strategies for responding to different types of contacts (2)

Call type	Dos	Don'ts
A caller who expects you to make a decision for them that you can't make	<p>Facilitate – don't problem-solve or rescue</p> <p>Acknowledge, via paraphrasing, that they may find it difficult to decide</p> <p>Use hypothetical questions (If you did or didn't do this, what do you think would or wouldn't happen?)</p> <p>Ask questions about previous experience (What have you done in similar situations in the past?) Re-statement of what the service can and can't do</p>	<p>Make the decision for them ('you must, you ought to, you should ...' etc)</p>
A caller who is unsure about what they want and may not be forthcoming	<p>Facilitate! Use open questions to draw out information (e.g. what is it that made you want to call us today?)</p> <p>Use reflecting back and paraphrasing as a prompt for the caller to say more</p> <p>Identify any concerns or worries that the caller may have about proceeding to tell their story</p> <p>If appropriate, reinforce the valuable step that the caller made to day in making contact</p> <p>Give appropriate reassurances about how anonymous and confidential the helpline is and how they can take their time</p>	<p>Use closed questions</p> <p>Hurry the caller up</p> <p>Expect to be able to problem-solve</p>
A 'circular' caller who keeps going over the same ground	<p>As early as possible, point out that it seems like there is a lot to go through in detail here, and that the helpline is only able to spend a certain amount of time on this call.</p> <p>Interrupt to acknowledge that the conversation doesn't seem to be making much progress.</p> <p>Use 'we / us' language (e.g. 'we have been talking about this for a while now. Let's look at what action could be taken ...') Focus on future. Ask a question like 'What would you like to happen'?</p>	<p>Interrupt to tell the caller that they must shut up</p> <p>Let the caller go on indefinitely</p>

## Looking after yourself

- Stand up when talking to an angry or abusive caller. This may enable you to be more assertive in your response to the caller and will highlight to your colleagues that you're taking a difficult call.
- If you feel that you're starting to panic in response to what a caller is telling you, slow down your breathing. This will help you to stay calm.
- If you know that there are issues which are likely to press your 'crumple buttons', write them down on a piece of paper with a capital B for BREATHE next to each one to remind you to breathe through those particularly difficult calls.
- If a caller is going round in circles and you want to end the call, put your hand out in a 'stop' motion as you wind up the call.

## Providing support to helpline workers

It is important to give helpline workers a safe environment in which to express themselves, let off steam and discuss their feelings about the contacts they are taking and to prevent stress and burnout.

Helpline workers should also have a chance to:

- admit if they think they've made a mess of a contact
- check that what they did on a contact or said to a helpline user was OK
- check if other helpline workers have had this type of contact or helpline user
- be reassured (if necessary) about how they handled challenging contacts, or get some tips to handle them better in the future.

A supervisor, team leader or an experienced peer can provide support and can:

- respond briefly to any questions on policies or procedures
- provide practical tips on contact handling to improve practice in the future
- provide the helpline worker with any urgent information relevant to the helpline
- take action in cases of contacts requiring any immediate follow-up that cannot be undertaken by the helpline worker

Support should be available, within reason, as and when it is required. Helpline workers should have the opportunity to debrief, including in mid-shift after a challenging contact just in case they are unable to continue for the rest of the shift. A helpline worker should be able to 'switch off' and should not take the emotional impact of the work home with them. Any feelings of stress should be acknowledged.

Although they have some things in common, support is not supervision. Support can be brief, informal and operational, whereas supervision is usually concerned with performance over a reasonable time period and looks forward to future development needs in line with those of the organisation.

You need to provide a safe and confidential space for the helpline worker to talk about how they feel. It is important that helpline workers don't feel judged if they are honest about how they feel. So what you are really aiming to do is to listen empathically to them, just as they will have been handling helpline users. The helpline worker may have had to put their own beliefs and views aside in order to handle a helpline user, but the worker may need an outlet after the contact to express how that might have been difficult for them.

A mature helpline worker who feels secure enough with their de-briefer should be able to tell you if they think that the dynamics of the contact were or might have been adversely affected.

If the helpline worker is being unnecessarily self-critical about a contact they handled, you can ask '*What do you think you could have done differently?*' Sometimes exploring this will

elicit that there wasn't anything they could have done. At other times, something may emerge which could have been done differently, so this can become a learning experience and/or identify a training need that can be taken to supervision.

## Picking up on feelings

If you are listening to people who are emotional, you can pick up those emotions. Debriefing can be useful to enable the helpline worker to explore: *'Are these feelings to do with me or are they to do with the nature of the contact I have handled?'*

Things in our personal lives may resonate with things the helpline user tells us and make us more vulnerable to be affected emotionally by particular contacts. We will all experience significant life events at some point.

Debriefing can help to spot any patterns or trends in terms of our individual vulnerability. The guideline on reflective practice that follows can be used to encourage and support a helpline worker to reflect on their work.

## Reflective practice

Reflective practice involves the helpline worker viewing the helpline contact and their involvement in it as if they were an external observer. For this reason it is sometimes referred to as 'helicoptering'. It encourages helpline workers to develop awareness of the dynamic relationship between the helpline worker and the helpline user. It is more effective when supported by someone who is non-judgmental and familiar with the situation.

A debriefer can use the following guide to support a helpline worker to reflect on the call or IM.

- 1. Nature of the contact** – a debriefer can encourage the helpline worker to describe briefly:
  - Key features of the call / IM
  - What happened when - the dynamic relationship between the service user and the helpline worker and any assumed cause and effect
  - Possible outcomes of contacts – many helpline workers rarely know these
- 2. Personal involvement** – a debriefer can encourage the helpline worker to consider:
  - How did I react?
  - Why did I say or do what I did?
  - What was I trying to achieve?
  - How did what I said or did affect what I was trying to achieve?
  - How did it affect me?
  - What did I think or feel at the time of the call / IM?
- 3. Factors which created the results** – a debriefer can encourage the helpline worker to think about 'what influenced me?'
  - Organisational policies?
  - Personal factors?
  - What factors did I not consider?
- 4. Alternative approaches** – a debriefer can encourage the helpline worker to explore:
  - What could I have done differently? (What other choices or responses – if any - were open to me?)
  - What might have been their consequences, if so?
  - How would I respond if I got this type of call / IM again?
- 5. Learning and growing** – a debriefer can encourage the helpline worker to think about:
  - How do I feel about the call / IM / situation now?
  - What have I learned?
  - If unclear, what advice, feedback, information or procedure might help?