

Entry

Purpose

Much can be communicated or left unsaid during the initial contact with a client, donor, or family member. While we may be eager to take on new work or feel compelled to help in any way we can, it's important to learn as much as we can upfront and establish a consultative tone (as opposed to an expert or sales tone) and course of action.

Objectives

- To learn the significance of going slow to go fast
- To set that tone with a client before contracting
- To engage in active listening techniques
- To roleplay having these conversations and asking questions to solicit the information you need to arrive at the purpose of the engagement
- To move from expert to consultative approach

Facilitation Observations

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