

Communication and Counseling Over the Phone: Topic of the Month

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In the WIC Program, we communicate with current and new participants every day. When counseling over the phone, it may be challenging to hear participants clearly or fully understand what they are trying to share. When you know a person well, it is easy to fall into a comfortable dialogue; with someone new, communication may be more challenging. Good communication is not just part of customer service; it is the most important part of customer service. This memo will focus on tips and techniques to effectively communicate and counsel over the phone.

Starting off right

When getting ready to make calls, start by setting up your workspace for both security and comfort. Privacy is key; we need to ensure confidentiality for all our participants. We can ensure the privacy of our conversations by being in a secure location where we cannot be overheard. Choose a room that is separate from others and has closed doors or use a headset that allows for controlled hearing. When working from home or in a public space, it is the staff member's duty to ensure that privacy is maintained.

Another consideration is comfort. Choosing a location that is quiet, well-lit, and free from distractions will allow for [active listening \(PDF\)](#). Be sure that your environment allows you to listen effectively to the participant. Having a well-lit room will also keep you alert while allowing you to take notes or read information as needed.

The last step in preparing for the call is to do your homework. Read through the participant's history (notes/alerts/goals) and determine what you will need from them and what you may need to share. You can also help the participant prepare by sending a text or written reminder of the appointment date/time and what they will need to be ready.

Engaging the participant

Right from the start, the conversation must be two-sided. Whether answering a call or being the caller, be sure to identify who you are and get the caller's name. Once you have their name, use it whenever possible to start to build a connection.

Examples:

- "Minnesota WIC program, this is Eric. Who am I speaking to?"
- "Hello, my name is Sally. I am calling from the Minnesota WIC program. Could I speak to Sarah?"

With most people using cell phones, it may be helpful to anticipate connection issues. Let the participant know that if you get disconnected for any reason, they can call back, or you will return their call.

Example:

- “Cammy, if we get disconnected for any reason, please wait 5 minutes before you call back. More than likely, I will try you first.”
- “Cammy, I hear some static on the line. Please let me know if you are having any trouble hearing me.”

If you need to transfer a call, let the participant know what you are doing and what to expect. Be sure to also let the staff member you are transferring to know what is going on; a brief scenario can help make the transition smooth. Remember, you are working as a part of a team, and you can support one another with these extra steps.

Example:

- “Jamie, I am going to transfer you to Melissa, she will be able to best support you with your breastfeeding concerns.”
- “Melissa, I have Jamie on hold for transfer. She has concerns about latching on the right side. Baby is Sammy. Sammy is doing well on the left side but is refusing the right breast. I can transfer Jamie to you now.”

Building rapport

Once you have established contact, now is the time to start building rapport with the participants. The best way to make a good first impression is by setting the stage for the conversation. Let the participant know why you are calling, how long the call may take, and what to expect during your time together.

Example:

- “Sarah, is this a good time to talk?”
- “Great, I am calling today to complete the appointment you scheduled for Johnny. It looks like I will need to get a little information from you. We can chat about how things are going with Johnny’s eating, and then I will be able to look over your food package before we wrap up. I think this may take about 20 minutes. Does that sound okay?”

You may also want to address their environment to ensure active participation on both ends. The parents may be at home with their children in the background, and as this may be a distraction for them, we can be sensitive to that from the start. Recognizing where the participant is at, regardless of the situation, will go a long way towards building trust. Ask if this

is a good time to talk, allow them the space to address their child's needs, or even include the child in the conversation at some points, which can help put them at ease.

Example:

- "Nikki, can I ask, is Josie there with you right now?"
- "Please let me know if you need a minute to address Josie's needs during our conversation."
- "It is okay, if you would like, to have me on speaker so Josie can be a part of our conversation. I really miss seeing little faces in the clinic, it's sure nice to hear her voice."

Being empathetic will convey support and may help to show the participants that you respect their time and that you understand that this may not be easy for them. Additionally, it may help parents open up more, knowing there is no concern about the distraction.

Listen for non-verbal indicators

Active listening includes paying attention to non-verbal indicators while talking over the phone. You may recognize a pause or shift in the conversation, you may hear a change in their tone, a deep sigh, or it may just be that they suddenly became either very quiet or started talking quickly and loudly.

Listening for non-verbal information is the more challenging part of phone conversations. The change in tone or variations in pitch may be the participant's way of conveying a deeper meaning. If we notice a change, we can ask open-ended questions that allow the participants to clarify what is happening.

Example:

- "Lizzo, I can't see your face, so please tell me what you are thinking."
- "Please let me know if there is something that I have shared that is unclear."

Listening for words that show expression can give us a chance to address things that are not being said directly. Using a slight reflection, we can dig deeper into the meaning. Be sure to use a neutral or positive tone in your reply, as it can make a difference in how the reflection is heard. Also, take care to avoid using language or tone of voice that may convey disappointment or judgment. A participant who feels judged is less likely to share the whole truth and may not be open to moving forward with the conversation.

Practice

Now, try practicing replying with the phrases below *in a variety of tones*; notice how it feels to you. Which reply would you prefer to use?

- **Participant:** "I feel like offering her vegetables with every meal is pointless."
 - **Staff Reply (say it with a frown):** "Why won't vegetables fit into your daily meals?"

- **Staff Reply (say it with a smile):** “Tell me more about why vegetables won’t fit into your daily meals.”
- **Participant:** “I like most of the foods on the food package.”
- **Staff Reply (say it with a frown):** “Which WIC foods would you like more information about?”
- **Staff Reply (say it with a smile):** “Trying new foods can be challenging. What additional information may help with shopping for and using WIC-allowed foods?”

It’s not what you say, it’s how you say it!

Communicating clearly and effectively means a better understanding on both sides. The way you speak and share information matters. Talking to participants the way you would hope to be talked to is a good rule of thumb. Using open-ended questions and reflecting on what you have heard will decrease the likelihood that a misunderstanding occurs. Read on for some tips on effective communication:

- **It’s all about the attitude:** Smiling while you talk will improve your tone when speaking.
- **Keep it casual:** Speaking slowly and softly (low tone or moderate volume) can be calming. This pace also leads to a better understanding.
- **Say their name:** Use the participant’s name whenever possible; build trust with a personal connection.
- **Be positive:** Words like “You got this” and “You are doing great” can go a long way to boost confidence.
- **Listen carefully:** When actively listening, you can empathize and respond more carefully.
- **Be sincere:** Words like “Help me understand,” or “I hear what you are saying,” and “Let’s see what we can do about that,” will help show you genuinely care.
- **Use reflections:** Ensure you are correct in what was communicated, “What I am hearing is you’re not quite ready to start weaning.”
- **Take the time:** Give the participant time to think and respond, pay attention to pauses, and don’t interrupt.
- **Use affirmations:** Show you are listening and hearing. This can make the participant feel good: “Wow, it is great that you are offering vegetables with dip at every meal; you are setting your family up for success.”

Cultural barriers

Whether you are talking with a participant with limited English proficiency or working with an interpreter, it may feel like an extra barrier in communication. Our responsibility is to treat all participants equally with dignity and respect. Below are some tips to consider:

- **Be intentional:** “Some participants feel more comfortable with a staff member or interpreter who speaks their own language. I can arrange that if it would be helpful?”
- **Take time to understand:** “Please let me know if you are having any difficulty understanding me. I am here to help any way I can.”
- **Use and accept descriptors:** “I am trying to picture the dish you are describing to me; it sounds delicious.”
- **Be honest:** “I have not heard of that tradition, please tell me more about it.” or “I am having a hard time understanding you. Would you be okay with me getting some help?”

It is very important to treat each participant as an individual and to avoid putting them in a category based simply on their culture. When considering cultural differences, it is also important to note that each ethnic group may have variations in pitch, context, and grammar. You may find that some words don't translate directly from one language to the next, while other words sound the same but have different meanings.

For staff, it may be helpful to speak in soft tones while enunciating. As with any participant, avoid imperative phrases that command, “Don't give your child the bottle,” and limit the use of slang words, “My bad, I can totally put cheese back on your food package.” Orient interpreters ahead of time so that they understand the importance of translating according to the WIC staff's intent. Reminders, such as maintaining the use of open-ended questions rather than changing them to “yes/no” questions as they interpret, can be helpful.

Participants who do not speak English as their first language should always be offered an interpreter, even for short communications such as scheduling an appointment.

For more information on working with interpreters: [11 Helpful Tips for Working with an Over-the-Phone Interpreter \(PDF\)](#).

When challenges arise

All of us have had conversations that do not go the way we planned or hoped they would. How we handle difficult conversations with participants can impact their next visit. Starting with effective communication is one way to avoid confrontation or frustration on either side.

If the conversation turns sour, it is important to remain calm and try your best to stay in control. You may allow the participant the freedom to express their concerns and then try to defuse the situation with a calming reflection and even normalize the situation if able. This will help to show you understand and empathize with their frustration.

Example:

- “I understand you are frustrated with the changes; you are not alone; many people find this to be challenging.”

If there was a misunderstanding in what was communicated, apologize, and try to see if you can clarify what went wrong. If you are unable to assist them, try to offer an adequate solution that will work for you both.

Example:

- “Tammi, I am really happy you made it today, and I am so sorry for the confusion. We had you scheduled for 1:00 today; however, give me a few minutes to see what we might be able to do for you since you’re here. Does that sound OK?”
- “Jamie, I would love to help you today. Would it work if I called you back at 3:00? I would have more time then, so we can talk about little Johnny without interruption. Will that work for you?”

If the participant becomes rude and you have given them space to vent, it may be clear that you cannot move forward with the call. You could ask another staff member to step in or if all else fails, you may need to end the call. Be clear with the participant, let them know what is happening, give them the option to move forward calmly, or let them know you cannot continue.

Example:

- “Tammi, I understand that you are upset. I would really like to help you today and finish your child’s appointment. However, it doesn’t seem like we’re able to do so calmly and respectfully. Would you like to try to call back and complete this at another time?”
- “Jamie, I am sorry, I did want to help you today; however, at this point, I am going to have to end my time with you. I encourage you to call back when you feel you are ready to complete the appointment.”

WIC equally values employees and participants; both must follow the WIC Program [Rights and Responsibilities](#). If you feel you have been harmed or threatened by a participant, notify your supervisor immediately.

Supervisors may refer to the MOM policy [Section 1.11: Potential Participant Violations \(PDF\)](#) and reach out to their State Consultant with questions.

Tools for review

Effective communication and counselling take practice. You may notice that over time, it becomes easier to work with participants over the phone. Below are additional tools to assist in building your skills.

- [Remote Nutrition Education](#): Guidelines for Phone Education and Phone Tips.
- [WIC PCS Webinars 2019/2020](#): Stay Connected: Techniques for Phone and Video Education in WIC- September 2019.
- [Minnesota WIC PCS Webinars-2016](#) Telephone Communication- October 2016.

Related policies for review

[Section 1.7: Data Privacy \(PDF\)](#)

[Section 1.10: Civil Rights \(PDF\)](#)

[Section 1.11: Potential Participant Violations \(PDF\)](#)

References- complete listing of hyperlinks

[active listening](#)

(https://www.oregon.gov/oha/ph/HealthyPeopleFamilies/wic/Documents/orwl/active_listening.pdf)

[11 Helpful Tips for Working with an Over-the-Phone Interpreter](#)

(<https://www.health.state.mn.us/docs/people/wic/localagency/program/civilrights/helpfultips.pdf>)

[Rights and Responsibilities](#) (<https://www.health.state.mn.us/people/wic/rights.html>)

[Section 1.7: Data Privacy](#)

(https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch1/sctn1_7.pdf)

[Section 1.10: Civil Rights](#)

(https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch1/sctn1_10.pdf)

[Section 1.11: Potential Participant Violations](#)

(https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch1/sctn1_11.pdf)

[Remote Nutrition Education](#)

(<https://www.health.state.mn.us/people/wic/localagency/edchoice/index.html>)

[WIC PCS Webinars 2019/2020](#)

(<https://www.health.state.mn.us/people/wic/localagency/training/pcs/skills/2019webinars.html>)

[Minnesota WIC PCS Webinars-2016](#)

(<https://www.health.state.mn.us/people/wic/localagency/training/pcs/skills/webinars/index.html>)

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