WISE COACH®
Conducting Effective Client Consultations

The **WISE COACH®** acronym reflects a relationship where the veterinarian is an experienced, knowledgeable guide who educates and encourages clients, respecting their individuality while seeking the best outcome for the patient.

Welcome the client and patient
- Review information and adjust emotional tone to situation before entry
- Introduce self with good eye contact and thank client for their patience prn
- Clarify client and patient names and use them throughout the interview
- Greet and compliment the patient
- Assess and ask about visit-related fear or stress – offer treats prn
- Establish equal eye level with client (ideally sitting) and avoid barriers
- Ask non-medical question(s) to connect on a personal level
- Explain the process and mention that cost will be discussed
- Demonstrate warmth, respect, and interest

Investigate history
- Begin with and incorporate open-ended questions
- Use attentive and reflective listening without interruption
- Solicit for other client concerns and, if necessary, establish an agenda
- Be aware of your and the client's non-verbal signals throughout the interview
- Investigate signs, severity, frequency, progression, palliation, etc.
- Investigate client goals, beliefs, feelings, and concerns
- Ensure note taking, whether typed or written, is minimally intrusive

Summarize information
- Summarize key information and client concerns
- Express authentic empathy and support throughout the interview
- When appropriate, compliment the client
- Signpost steps and transitions – "Next I'd like to…."

Explore for more details
- Ask about lifestyle
- Ask about past history, preventive care, diet, allergies, and behavior
- Ask about current medications and supplements
- Perform systems review

[Perform Exam]
- Partner with client to minimize fear, anxiety, and stress
- Build rapport by commenting on and talking to patient
- Narrate key elements of the physical exam

Convey exam findings and your thoughts

- Share findings with confidence, clarity, and sensitivity
- Determine prior client knowledge related to findings
- Describe impact of findings on patient well-being
- Share information in manageable chunks and check client understanding
- Avoid or define medical terms
- Use visual methods to convey information

Outline a plan

- Suggest an optimal plan or, if that is unclear, describe options
- Take client's lifestyle, perspective, beliefs, and abilities into consideration
- Explain benefits and possible risks to patient, including risk of NOT proceeding
- Discuss patient comfort and goal to minimize patient distress
- Confidently discuss costs and payment options before seeking approval
- Notice and respond to non-verbal signals of concern

Ask for feedback

- Check client's understanding, feelings, and acceptance of the plan
- Help the client feel in control – avoid pressuring
- Offer alternatives as needed
- Find common ground – "We both want…"
- Obtain and document informed consent

Clarify expectations

- Recap the plan and verify agreement
- Set realistic expectations for care and communication
- Provide written and/or on-line resources
- If appropriate, suggest plan to reduce patient distress on future visits
- Ask if all client concerns have been addressed
- If appropriate, schedule procedure or follow up

Hold both client and patient interests in mind

- Act as patient advocate while respecting client perspective
- Build positive relationship with both client and patient throughout process