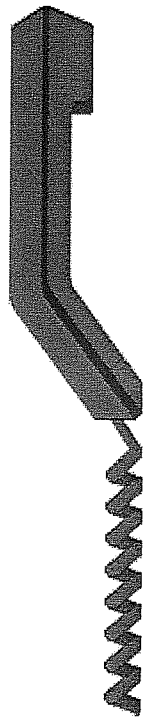


## Tips to Conduct Interviews by Telephone

**A thorough and timely exchange of information between a food stamp customer and a well-prepared eligibility specialist, with little or no inconvenience to either party -**



**- That's the definition of a telephone interview as described by the Pennsylvania Department of Public Welfare (DPW) to its eligibility staff.**

DPW conducts telephone interviews for all recertifications (through a waiver from the Food and Nutrition Service) to simplify the process for customers and eligibility staff.

Kevin Fedors of DPW's Staff Development designed an extensive training package on interviewing by telephone. The materials were based in part on suggestions from the Excellence in Service Committee (DPW staff members of different levels and classifications, whose mission is to ensure the best quality service for customers and eligibility specialists).

Kevin walks us through a typical training session on this alternative to the face-to-face interview.

The training session begins with an exploration of the impact telephone interviewing will have on the work of the eligibility specialists and their customers.

The objectives for the training are to enable the trainees to state the value of an effective telephone interview; prepare the customer for an effective telephone interview; prepare himself or herself for an effective telephone interview; and conduct an effective telephone interview.

Throughout the day-long training, ideas that make telephone interviewing easier, more effective and efficient for the customers and the eligibility specialists are identified and discussed.

*The Good, the Bad and the Excellent*, a video starring staff members of the Philadelphia County Assistance Office, provides a springboard for discussion. One segment depicts a face-to-face interview in which everything has gone wrong. The trainees are asked to record their observations of the video. They discuss the ways in which the incidents in the video could affect the customer/eligibility specialist relationship during future encounters. The trainees also look at what would have happened if the interview had been conducted by telephone.

The other segment of the video presents a telephone interview, and the trainees are asked to judge whether different is better.

The trainees are reminded that time, energy and unnecessary work can all be saved *only if* the eligibility specialist prepares in advance to ensure the best possible telephone interview. Proper preparation involves the eligibility specialist, the workspace and the customer.

### To prepare yourself

- Advise peers of your interview schedule. (This will help to eliminate most distractions and interruptions and allow you to concentrate on what the customer is saying. Your colleagues will be respectful of this - they also will require the same consideration from you when they are interviewing.)
- Prepare your desk and mind to be clutter-free and organized during the interview.
- Remove all other records from your workspace.
- Have the necessary materials at your fingertips, i.e., case record, application, forms, narrative, pens, pencils, etc.
- Have the computer screens up and running.
- Keep a list of on-line verification sources available, if needed.
- Have your prepared questions and needed verification list nearby.
- At the conclusion of the interview, take the time to walk away from your desk and focus on the next interview.

### To prepare your customer

- Explain how the process will differ from the face-to-face interview.
- Ask the customers to post the time and date of the interview in a place where they will see it and remember it.
- Remind them to set aside ample time for the interview so the interview will proceed more effectively without interruptions.
- Explain that you will send a detailed list of everything they should send before the interview.
- Explain the importance of them returning these items by the deadline indicated in the letter.
- Ask them to conduct the interview in a quiet part of the house, turn off the radio, televisions, pagers, etc.
- Ask them to give children something to do during the interview.
- Ask them to have a pen and paper on hand to take notes or write questions.
- Ask them to prepare a list of questions prior to the interview.
- Remind them to ask questions if they do not understand what is being discussed.

### To conduct the interview

- Accept the fact that you will no longer be able to rely on visual cues but will need to listen for tone and the actual content of the customer's words.
- Use a script to open and close the interview to ensure that all questions are discussed and relevant points are made. Practice your script with another eligibility specialist and in your mind before the interview starts.
- Build a "mental movie" of how the interview will progress.
- Insulate yourself as best you can from outside interruptions during the interview.
- Use active listening techniques. Provide feedback after an applicant answers a question; use statements such as, "This is what I'm hearing..." and "Help me to understand..."
- Listen for inconsistencies, which can be indicated by delayed responses, long pauses and "um" and "ah" in conversations, and ask follow-up questions.
- Confirm understanding by asking questions until clear on all issues, and ask the customer to confirm your understanding by repeating it to you.
- Be clear and ask open-ended questions. Don't be afraid to ask multiple questions about a particular subject, especially if there is doubt or confusion.
- Identify and only request information necessary to determine eligibility.
- At the conclusion, ask, "Is there anything else you need to tell me?", or "Do you understand what we have accomplished today?", or "Do you have any questions for me?"
- Use a wrap-up checklist.
- Be specific and consistent about deadlines for verifications.

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