

**IACP 20<sup>th</sup> Annual**  
**Celebrating 20 Years of Inspiration**  
**Enrolling Folks in the Collaborative Process**  
**Workshop #20; October 26, 2019**

**Outline**

2:00-2:05pm

➤ **Welcome & Overview**

- Goals for the day
- Housekeeping: Materials, Breaks, Restrooms, Wrap-Up

2:05-2:30pm

➤ **Attracting Collaborative Clients**

- First contact
- Understanding and reframing clients' goals
- Educational materials/resources; tools to help clients
- Obstacles and strategies to enrolling potential clients

2:30-3:00pm

➤ **Initial Client Interviews**

- Demonstrations: Prospective client meets with each professional
  - informed decision-making
  - critical points and obligations
  - understanding role of each discipline
  - common topics clients bring to the table
- Debrief: Observations and perspectives

3:00-3:30pm

➤ **Experiential Learning**

- Role-Play      Participants role-play Initial Client Interview
- Debrief        By profession (Lawyer, coach, child specialist, financial neutral)
- Small Group   Discuss your understanding of 'role of each professional'

3:30-3:45pm

\*\* Break \*\*

3:45-4:30pm

➤ **Q & A**

Concepts, approaches and takeaways

➤ **Initial Client Interviews – part two**

- Demonstrations: Prospective client meets with each professional
  - ethical considerations & practice protocols
  - enrolling the spouse, confidentiality, & ethical other considerations
  - working with untrained professionals
  - contacting other professionals; timing and purpose
- Debrief: Observations and perspectives

4:30-5:15pm

➤ **Experiential Learning**

- Role-Play      Participants role-play part two: Initial Client Interview
- Debrief        By profession (Lawyer, coach, child specialist, financial neutral)  
Review 'Obstacles to Enrolling' to assess comfort level

➤ **Wrap-up & Feedback**

*Tying it all together; professionals use different modalities*