



# Screening Your Clients

*Hands-on or virtual consults each have their advantages and disadvantages*

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Client screening is the process of evaluating potential clients to determine if they are a good fit for your business. It is important to screen clients before you start working with them to avoid problems down the road. Here are a few suggestions on how to determine whether a client/dog team will be suited to your specific skills and experience and in which venue – hands-on or virtual. First and foremost, are you qualified to take this particular case? A case is both a client and a dog with two very distinct entities. Each brings to the table their individual set of strengths and weaknesses. For example, are you comfortable handling an aggressive dog with a nervous client? An overbearing client with a fearful dog? If it is something you have never worked on, but you feel competent enough to try, make sure

you have a mentor available to help. If at any time during the training or rehabilitation process you are developing concerns, it is acceptable to get advice or even refer the case.

During the screening be aware of your initial reaction. Are you already tense just listening? Not all communication styles are compatible. Not all personalities are compatible. Will they take constructive assignments? Are they capable of changing their philosophy? Or do they just want you to confirm theirs? Can they follow instructions? Would your personality and skills be better suited to a different client? Would this case be better suited for another professional?

Overall, what is your gut feeling? Are you rationalizing your first impression such as, “This client might be difficult, but I really want to work with the dog”? Or, “This dog is going to be difficult but I really want to help this client?” Is this client giving the dog a last effort to assuage their guilt but really is not committed? Or, are they truly looking for help and will be receptive and willing to put in the work?

## SCREENING FOR CONSULTS: HANDS-ON TRAINING OR VIRTUAL?

The hands-on client is not necessarily the same as the virtual client. Each type of consult has its own inherent advantages and disadvantages. If you provide both, the initial screening will be the determining factor in deciding which will work best for this specific case. A less experienced dog parent with a cursory understanding of the problematic behavior(s) generally needs one-on-one assistance. They may need more “handholding,” guidance, confidence, and reassurance. They may learn “by doing” and blossom with small step-by-step guidance and demonstrations.

The one-on-one is also appropriate for someone who has experienced a traumatic event with his or her dog. This consult will require emotional support for both the dog and pet parent(s). Your listening skills will be much more important than theirs. They will need to talk! You will need to listen. This type of consult begins by first letting the pet parent(s), “talk it out.” Only then can they be ready to help their dog adjust post-trauma. We know that learning cannot take place when in a state of high arousal, whether it be a dog or a human. Your job is to first get the pet parent (s) into a state of calm and confidence, so they can do the same for their dog.

The client with a resistant partner may also need extra hands-on help; negotiating with a resistant partner and dealing with a dog’s behavior can be frustrating. Perhaps having a dog is a different priority for each pet parent? Explore this! In such cases, you might discover that they have different needs and expectations. How can you help them achieve a middle ground?

Sometimes making them aware of the dog’s life from the dog’s perspective (his *umwelt*) can increase empathy, and motivation to help, bringing a resistant partner into the fold. Your skills as a mediator and educator will be necessary to help diffuse this kind of situation. These are best done during a hands-on-consult.

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In some cases, your presence may be required to repair the canine-human relationship. (Notice, the word relationship is used, and not the word bond). A relationship and a bond are two very distinct emotional ties. A relationship implies a give and take among two parties. A bond is not dependent on receiving, it is unconditional no matter the behavior of the other party.

Early assessment of this is critical in developing your protocol. For example, even though the relationship is faltering, there is hope, if the bond is still intact. Even if the client does not trust or even like Fido at the moment, they are still committed. With a little hands-on guidance, their relationship can be put back on track. Pointing out the positive traits of Fido and showing them how smart he is, can jump-start the training or rehabilitation process. Demonstrations of even basic behaviors can make a pet parent fall “in love” again.

In some cases, a short separation can be what the pet parent needs to regain their emotional balance. This can be accomplished by arranging for overnight boarding or just a two-week play date schedule. In more serious cases, the dog remaining in the home is no longer an option. The pet parent who is no longer bonded needs help in exploring other alternatives. If the bond is broken, there is no longer a viable relationship. The state of the canine-human relationship and the level of commitment will need to be addressed before any rehabilitation or training can begin.

A virtual candidate is generally more experienced around and with dogs and has better-than-average communication skills. Being a good listener, motivated, and confident, are important for a virtual to be successful. Equally important is the level of commitment, as we know it is equal to the level of success; assessing this can be a good predictor! Are they willing to work as a team within the home, understand instructions, and are good at following through?

These are the foundations for a virtual consult:

**Compliance:** Compliance is a combination of motivation, listening skills, and the ability to comprehend the reasons for, and how to implement instructions.

**Motivation:** What is their emotional tone? Are they upset? Worried? Angry? Heartbroken? Frustrated? Pleading for help and will do anything? Are they already setting limits and caveats? Making excuses or rationales? Are they setting up roadblocks for success? Looking for a “way out” to relinquish the dog?

**Listening:** How well does this potential client LISTEN? This can be quickly assessed in the first interview. Are they talking, interrupting, jumping from one problem to the next? Will they be able to focus on the issue at hand and implement a management protocol? The client who in the first interview gives a litany of all the things they tried and did not work is probably not a candidate for a virtual consult. Are they blocking suggestions before ever beginning?

The client who offers reasonable explanations and takes responsibility for their dog’s behavior is an excellent candidate for a virtual. It is up to you to listen carefully and ascertain what type of consulting would best suit this human-dog team.

**Comprehension:** The client with any combination of the following: rudimentary knowledge of canine behavior, lack of confidence, difficulty following and or implementing instructions, certainly will need the hands-on help and is not a candidate for a virtual consult. However, the client that is fairly knowledgeable about dogs, takes individual responsibility for their and their dogs’ behavior(s), is a proactive pet parent, capable of managing the dog’s environment, and can implement lesson plans by themselves is an excellent virtual client.

### SUMMARY

These questions will need to be addressed in the initial interview or as early as possible in the consult. If your client cannot or will not follow through there is no point in proceeding. Maybe your personality would work better with a different client or vice versa? Do not hesitate to refer a client to another trainer. Being aware of your strong points and tolerance levels is equally important. Maybe your focus is primarily on the dog or is it the human-canine relationship? This is a question you must ask and answer.

Your focus can certainly change from case to case depending on both the pet parent and dog(s) behavior(s) in question. It is helpful to identify your reason before accepting. You may need to remind yourself why! Accurately screening the client and their needs will directly affect the outcome of your training or rehabilitation. You must be honest with yourself, if you need time to think about it take it. Keep in mind that if there is any hesitancy on your part... (you don’t always have to know why) trust this and decline. Having an attitude of excitement and optimism creates a positive and productive experience for everyone, especially Fido!



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