

## Chapter 3

# FRAMEWORK: NUTS AND BOLTS OF BOUNDARIES

### Framework:

The logistics by which we define ourselves as professional and create a safe atmosphere for our clients. Framework includes the ways that we present ourselves in advertising, the preparation of the physical setting, our policies on fees and time, and such ground rules as keeping the focus on the client.

*Framework details are the nuts and bolts of good boundaries.*

**Framework** issues can seem dry and dull. Who wants to talk about the joy of starting sessions on time and the delights of clean sheets? But it is in those details that we define our practices as professional. As discussed in previous chapters, our clients are vulnerable; they need good boundaries to trust us. Framework details are the nuts and bolts of good boundaries.

Many somatic practitioners' careers have suffered because of carelessness about the finer points that make clients comfortable. Clients care about those issues more than we may be aware.

Here's an eye-opening conversation I had with a friend:

I asked my old friend Robbie what made her a loyal client of her massage therapist. "She's very competent," she said. Since Robbie is an art history professor and doesn't know effleurage from petrissage, I was curious how she came to that conclusion. She thought for a minute and said, "Her tapes are long enough."

She meant that the massage therapist was careful to have music that lasted for the whole session, so she didn't have to fumble around with changing tapes and interrupt the flow. She added that the room is always clean and tidy, the table is heated, and the therapist doesn't talk unless Robbie initiates a conversation. Also, Robbie felt the therapist never gives a massage by the numbers but always homes in on where Robbie's aches and pains are that week.

Our clients know little about the technical part of our work. Our offices are foreign territory to them. The only way they can judge our competence and caring is by our professional behavior and whether they feel safe with us. The ability to create an atmosphere within which clients can make use of our work is crucial. We may rush to learn the latest techniques and pride ourselves on our sensitivity, but our effectiveness may depend on whether or not, in a manner of speaking, our tapes are long enough.

If you work at a spa or in a doctor's office, you may have limited control over some aspects of framework discussed below, such as the decor of the treatment room or how clients are scheduled. However, other guidelines, such as not discussing clients' treatment with them outside of your work environment, are relevant no matter where you practice.

## The Need for Framework: Holding the Space

Some practitioners call it “holding the space.” Others call it “creating a container.” They recognize that clients need to have a special environment that is focused solely on their well-being. Attending to framework is more than simply buying massage oil and soothing music; we need to take care of all the details that make us professional. Careless framework can interfere with the therapeutic process. A colleague reports:

I used to be a massage therapist in a holistic center in which no one had an assigned office. Instead, we used whatever room was available at the time. Sometimes my client and I had to wait 10 or 15 minutes until a room was free. We rarely worked in the same room two times in a row. The other practitioners and I often talked about how uptight our clients seemed to be. Now I see that their difficulty letting go was probably a response to our erratic setup. How could they relax in such an unstable environment?

When the framework isn't stable, sometimes clients are uncomfortable without knowing why. They just feel out of kilter. They may be more demanding or more tense than they would be if they felt safe and attended to. Practitioners also are affected by unreliable framework. Not only are we more likely to be dealing with cranky clients, but also we can be drained by the lack of stability in our work lives.

There *are* good practitioners who are careless with framework yet seem to have healthy practices. Clients sometimes forgive other omissions if the practitioner has a terrific personality or great technical skills. Yet even in those cases, clients notice and respond positively if those practitioners start attending to framework issues. And the practitioners find they have fewer “difficult” clients and more energy at the end of the day.

A popular massage therapist worked for years out of a room in her home that was less than neat—in fact, it was a cluttered mess. Despite that, she was successful because she was a good listener and a sensitive body-worker, plus she was professional in every other way. Recently, she complained that her work seemed to take more and more energy over the years. I suggested that she try simply tidying up the room. I thought that she wouldn't have to work as hard to create a professional atmosphere if the room said it for her. It was a small change, but she reported that cleaning up the room made a difference. She looks forward to her work more in this neater, more professional office and reports that new clients seem to settle in and relax faster.

Some practitioners have great personalities or amazing skills. For the rest of us, the majority, who are charismatically impaired and less-than-dazzling technicians, attention to framework balances our shortcomings. Consistency, care for the client, and the ability to set limits well can go a long way toward a solid, satisfying practice. And we will last longer in this profession.

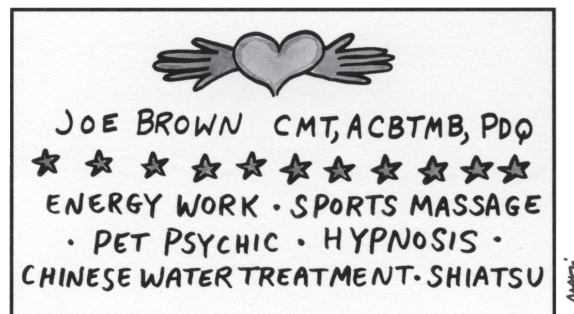
## Framework Basics: Setting the Stage

Our work with clients begins long before they walk through the door. It starts with the first phone call, the first time they meet us, or even the first time they see our business card. We need to take care of how we present ourselves from the very beginning. With every detail, we need to consider the basics of the professional therapeutic relationship. For instance, any advertising—whether it’s putting up a business card at the health food store, running an ad in the newspaper, or creating a website—should involve clear and honest information about who we are and what we do. Ads are the beginning of educating clients about what to expect from us.

### *Business Cards*

Business cards usually won’t make or break a practice. Some practitioners with successful practices have unimpressive-looking cards. However, your card is one more piece of information about you; you want it to give clients a favorable impression and perhaps a sense of your personal style.

Business cards should be simple and eye catching. Avoid making a long list of the techniques and modalities you offer, especially if they are techniques that are unfamiliar to most of the public. Some cards look like a smorgasbord: “Mary Smith—Hypnotherapy, Past Life Regression, Acupressure, Sports Massage, and Palm Reading.” That hodgepodge of services can be bewildering to the public, and prospective clients could also be skeptical that, unless Mary Smith is 103 years old, she can’t be really good at all of those things.



*Long lists on business cards can be confusing.*

Beware of using only your first name on a business card. It may look as though you have a reason to hide your identity, and it's also the way that sex workers advertise in the newspaper. Not a good idea. You might also think twice about using cute names, such as "We Knead U." The tone is friendly and humorous but could be seen as making a joke of your work.

Having a business card shows people that you're serious about your work; people expect professionals to have business cards. Also, the process of designing a card often helps you clarify what tone you want to set for your business and what you want people to know about you.

### *Advertising and Reaching the Public*

If you wish to advertise, there are some basic guidelines to follow. It may sound obvious, but first decide what population you want to reach and then figure out how to contact them. It's a good idea to talk with colleagues and more experienced practitioners in your area to see what has worked for them. As with business cards, advertising needs to be simple and attractive. Massage is such a personal service that you may not receive many calls from impersonal advertising alone, but it does help prospective clients to begin to associate your name with your business.

Speaking to groups about massage is one good way to advertise. Once people have met you (assuming you appear friendly and professional), they are more likely to feel comfortable making an appointment. Such presentations can include a short talk on the benefits of massage or your particular kind of massage, followed by a brief demonstration. The demonstration can be, for instance, a foot massage on a clothed volunteer. It helps if people can see the care and concern with which you approach your clients. Your talk can include enough technical detail or anatomical references to show people that you know what you are doing; however, keep in mind that most people just want to know if you can help them feel better.

### *Websites*

For those in private practice, having a website has become practically a necessity for connecting with prospective clients. Unlike business cards and ads, websites give you room to explain your kind of bodywork, beliefs, credentials, fees, and answers to typical concerns. You can put your website's address on your business card and give prospective clients the opportunity to find out more about you. A website doesn't need to be elaborate and large—just attractive, professional, and informative. It's another way to convey your own style and values. As with any advertising, it's a good idea to get feedback from colleagues and mentors before making it official.

### *Phone and Voice Mail Guidelines*

If clients call you directly to set up appointments, what they hear when they first call your business phone number is an important part of setting the stage. Very few somatic practitioners have an office with a receptionist. Most have various ways—such as beepers, voice mail, and answering machines—for people to contact them and leave messages. No matter what your preference, you want to be easily accessible, sound professional, and provide privacy for your clients and prospective clients. This is often the first contact the public has with you, and you don't want it to be the last.

Right from the start you can demonstrate the elements of a professional relationship. For instance, to be client centered in your first contact, put yourself in the client's position. What kind of message would you want to hear if you were calling a stranger to ask her or him to work with you in a highly personal way?

*For clients' confidentiality, you need to have a way that they can leave a message that only you can access.*

Other boundaries come into play here. For clients' confidentiality, you need to have a way that they can leave a message that only you can access.

If your phone line is shared with colleagues, family members, or others, it is fairly inexpensive and easy to have a separate box to your answering system and a message of "Press 1 for Susan Jones." Alternately, a voice mail service or cell phone exclusively for your business is a good choice. These options also avoid the boundary problem of giving clients an unnecessary glimpse into your private life. Even if you live in a small town and everyone knows a good deal about your personal life, prospective clients will be comforted to know that you keep your business separate and guard your clients' privacy.

It's unprofessional and a violation of confidentiality to allow client's messages to be heard by your family members or anyone other than staff members who are trained to keep confidentiality. Even the fact that someone is your client should be guarded. A colleague reports:

I once worked with a small group of therapists and bodyworkers in a situation where everyone shared a phone line, and each of us could hear the others' messages as they looked for their own. More than once, I heard parts of private messages from people that I knew (and sometimes didn't know were in therapy with one of the counselors) that I'm sure the person wouldn't have wanted me to hear. Just the sound of a client's voice when that person is feeling needy is too personal for your colleague, partner, or family member to hear.

Your phone greetings should be warm but businesslike and to the point. There's no need to try to be clever and say something like, "This is John's answering machine." Everyone knows by now that a machine isn't really talking on its own. And does anyone really enjoy having to listen to a musical

prelude when they reach someone's answering machine? Prospective clients usually appreciate a short, relevant, friendly message.

If you take and return business calls from your home, make sure the television isn't blaring in the background and your children needing attention. For incoming calls, use a screening device such as a caller ID so you can choose when to answer. Allowing friends and family members to answer your business calls can lead to problems. For instance, a boyfriend answering the phone may send out more information about your life than the client needs. And a small child answering the phone might be endearing but also annoying. Even one minute of repeating "Is your mommy home?" may give new clients second thoughts about making an appointment with a new practitioner. They may wonder if the practitioner's family life will interfere with her professional life in other ways.

### *The First Conversation*

The therapeutic relationship starts with the first conversation. If you have a private practice, the first conversation will usually be on the phone. In a spa or a doctor's office, it will generally be in person.

*The therapeutic relationship starts with the first conversation.*

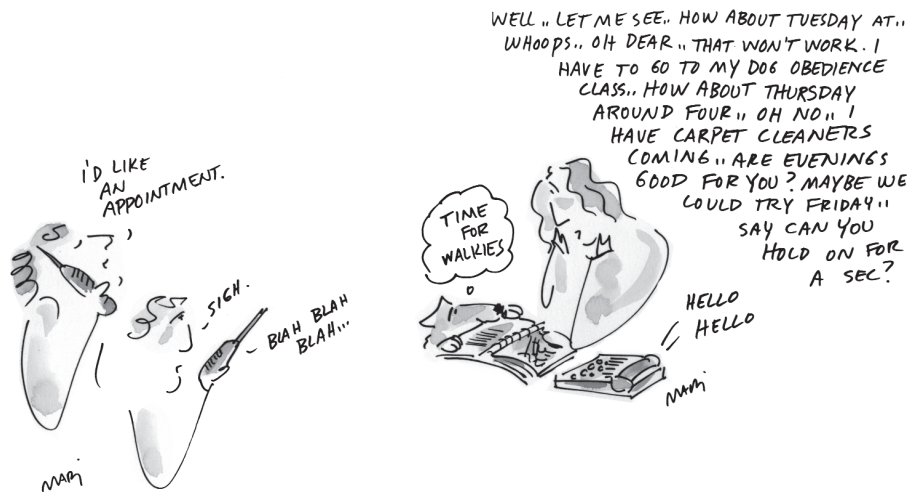
#### PRIVATE PRACTICE: THE INITIAL PHONE CONVERSATION

When a prospective client calls to ask about your work, be informative and reassuring, but don't sound as if you're reading from a set speech. Know ahead of time how you want to answer the usual questions: your fees, your hours, and the particular benefits of your modality. (Chapter 8 gives tips about how to deal with clients looking for sexual services as well as how to advertise to avoid such misunderstandings.) Because commonly asked questions may vary depending on the modality or even what region of the country you live in, it's a good idea for new practitioners to ask more experienced colleagues in their area for advice about this first phone call. Also, you don't want to stumble around when prospective clients ask you the benefits of your work. Rehearse with a friend.

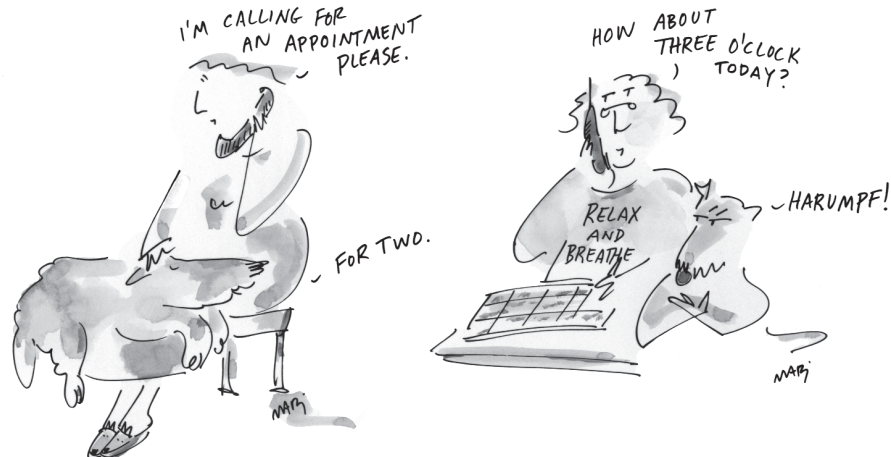
Much can be learned about clients in the initial phone call. Do they, for instance, want to share a great deal of personal information or ask for advice? You can start setting boundaries in that first call by letting them know that some issues are best dealt with during office visits. Be careful about letting people take up an unusual amount of time on the phone; it sets a bad precedent. Even with these earliest contacts, it's important to be aware of setting limits to protect yourself.

If a client asks for an appointment tomorrow at 3:00 and you don't have that opening, you don't need to apologize and ramble on, as if to a friend, about why you can't see them then. Clients simply want to know what appointment you *do* have open.

## 34 THE EDUCATED HEART



Instead of this . . .



Try this.

The first phone call is a great opportunity to educate the client. You can set the stage for the session:

Arnold Katz, a massage therapist in Boston, says that even in the first phone call, after a client has made an appointment, he explains what will happen in the session very thoroughly so there's no mystery. He takes clients through the session step by step from the minute they



come in the door—that he will take a physical history, that he will then leave the room so that they can get undressed, that they will lie under a sheet and be draped at all times, and so forth. He lets them know from the beginning that if they are uncomfortable in any way, at any time, he wants them to speak up right away.

Aside from honoring clients' right to informed consent, letting new clients know what to expect can help them be more at ease when they arrive for their first session.

#### WORKING FOR AN EMPLOYER: THE FIRST IN-PERSON ENCOUNTER

If you work for a spa, physician, or chiropractor—basically any setting in which the client has been assigned to you without first meeting you—you may have only a brief time in which to orient clients to the setting and put them at ease, perhaps only the moments between meeting a client in the reception area and walking him or her to the treatment room. Still, that's time enough for you to establish the beginnings of trust.

Remember that most clients may be unsure about what to expect; they may not have been to your spa or place of employment before and they may never have had a massage. As much as possible, spell things out for them: "I'm glad to be working with you today. We'll go back to the treatment room and I'll tell you more about what to expect." One massage therapist at a spa noticed that clients seemed wary when she closed the door to talk with them. When she started explaining to new clients, "I'm closing the door to keep the noise out while we talk," that settled them down.

Simple and clear explanations are helpful: "This is the private room where I'll work with you. In a minute, I'll leave while you undress and get under the sheet. But first, I want to know if you have any particular place that is hurting you, like your shoulders or back?" Remember that this can be a foreign setting for many people and the issue of nudity can make them anxious. Explain to them that they will be covered with a sheet during the massage, except for where you are working, and that they can fully undress or leave on underwear for their comfort. Most people want to do what's appropriate. They just need to know exactly what you expect.

### Framework Basics: The Setting

A therapy room that feels safe and inviting to clients will benefit your practice and be a joy for you to work in.



### *Private Practice: Home or Office?*

Where to locate a private practice is a personal choice that depends on several factors, including cost and convenience. If you can afford it, working out of an office rather than a home is generally more professional and will feel safer both to you and to your clients. A client reports:

When I first started getting bodywork, I made an appointment with a male practitioner I didn't know. Even though he'd been well recommended, I was uncomfortable because he worked out of his house. When I went for that first appointment, I actually gave a friend the practitioner's address and said, "If I don't call you in 2 hours, call the police." The session went fine, but I want bodyworkers to know that their business can be affected if they work out of their homes.

If you choose to work out of your home, use a room that's set aside just for your professional work. The message to clients is that this is a space solely for clients. There's also an advantage to being able to shut the office door at the end of your business day and focus on your private life without reminders of work concerns.

When working out of your home, the best arrangement is to have a separate entrance for clients or a way for them to access your office without getting a view of your private living space. Having a separate bathroom for clients is also ideal.

Whether your office is in your home or outside it, you want it to feel warm and inviting to your clients but still professional and not overwhelmingly personal. If you work out of your home, you don't want your office space to look like a bedroom with a massage table in it—eliminate bedroom-type furniture and large numbers of personal pictures and items. There's no harm in having a couple of family pictures in the room—in fact, it can be reassuring to clients to see that a practitioner is married or has children. Also, a picture of the practitioner's partner or spouse may discourage a client from making romantic overtures.

Practitioners need to avoid making their offices into displays of their personal beliefs—political, spiritual, or otherwise. Clients may feel excluded if they don't share your beliefs, or they may have judgments about your beliefs that will affect how they feel about you.

### *Preparing the Room*

Wherever you work, clients love coming into a room that's all set up for them—neat, warm sheets on the table and everything ready to go. Ready rooms are an immediate sign of your professionalism and caring.

Clients won't feel comfortable in unclean rooms or surroundings. Make sure the treatment room and the bathroom clients will use are clean. With so many new viruses and bacteria popping up these days, people are concerned about catching something. Find a balance between a room that smells antiseptic and one that feels as though germs may be lurking in every corner. (Also, remember to wash your hands before and after you work with a client. Although that sounds obvious, if doctors forget to do it—and studies show that they do—manual therapists probably do, too.) The need for order and cleanliness in the environment can go deeper for some clients. After all, some people grow up with ideas about their bodies being “dirty” and may feel a heightened sensitivity when they come for bodywork. Clean, orderly surroundings help clients relax.

There's a saying, “Heaven is in the details.” Professionalism calls for an angelic attention to the finer aspects of how you present yourself and your work and how you welcome clients into your practice.

### *Draping*

Appropriate draping of clients is required for privacy and comfort. If a client asks not to be draped, advise the client that it's part of your professional standards that every client be draped. There's no really good reason to allow a client not to be draped. The manual therapy profession is still striving to separate its public image from that of sex workers, and appropriate draping is an easy way you can define that difference.

### *Basic Session Framework*

Erratic framework affects both client and practitioner. Clients may feel nervous or fussy in a confused framework, and practitioners may respond by being harried or drained by the end of the day. For instance, imagine being careless with just one aspect of framework, such as starting and ending on time. How would you feel if you ran late all day? Imagine how it would feel to be the client of someone who was never on time.

The following framework guidelines provide a solid structure for your work. (These guidelines were adapted from Narboe N. *Working with What You Can't Get Your Hands On*. Portland, OR: Narboe, 1985.) If these guidelines sound too much like rules, try thinking of them as small acts of kindness toward vulnerable clients. They are also small acts of self-discipline that will make your work life run more smoothly. If you aren't already using these guidelines, you may want to try them out and see if you notice a positive difference. (Practitioners who have been scattered about framework in the past will need to be consistently careful for some time before noticing a difference.) If you work for someone else, you may not have control over the implementation of some of these guidelines. Therefore, you

may want to seek clarification about a prospective employer's policies, particularly on such issues as informed consent and confidentiality.

- Clients know what to expect and what is expected of them.
- Sessions start and end on time.
- Sessions occur at the same time and place at regular intervals.
- Nothing interrupts a session.
- Practitioners avoid casual discussion of treatment or sessions with clients outside office boundaries.
- Practitioners carefully safeguard clients' rights to privacy and confidentiality.
- Clients are unaware of each other.
- Practitioners don't ask clients to attend to their needs.

### *Clients Know What to Expect and What Is Expected of Them*

Before you begin the hands-on work, you need to receive the informed consent of the client. If you are in private practice, you can ask the client to sign a consent form that explains your credentials, the nature of the treatment, and the possible benefits and side effects. All massage therapists would be wise to advise the client in written or verbal form about any consequences of the treatment such as muscle soreness or light-headedness. Assure clients that they have the right to refuse any procedure at any time. Clients should also be advised during the session when you want to introduce any treatment procedure not previously agreed to and also when you are going to be working near the breasts, anus, or genitals.

The agreement the client signs should also give details about fees and cancellation policies and any other financial policies, such as procedures for bad checks. If you work for someone else, your employer is responsible for financial agreements.

Procedures regarding confidentiality should be part of the initial intake of those in private practice and are discussed under "Practitioners Carefully Safeguard Clients' Rights to Privacy and Confidentiality," later in this chapter.

### *Sessions Start and End on Time*

Time boundaries help make a safe container—they define the professional situation as different from a social one and put limits on the nature of the relationship. Obviously, if you're in private practice, you'll have more control over the time variables; however, those who work for others can do their best to provide good time boundaries within the structure provided by their employer.

Starting on time is respectful of both your time and the client's. For instance, if a client shows up early for an appointment, you still want to start the session at the appointed time. Don't let a client cut into the time you've set aside to rest or return messages. If a client with a 3:00 appointment arrives at 2:45, you can greet her with a smile and say, "I see you're early. Just have a seat in the waiting area. I'll be ready for you at 3:00."

Ending on time is just as important. "If you don't end your session on time, your client will never trust you," says Sandra Wooten, director of Rosen Method Center Southwest. Clients like to know what to expect and schedule other parts of their lives based on those expectations. Unpredictable practitioners can make clients uneasy. If you go long one session because the client is in pain, she may think you'll go short next time if she's not and may begin to come up with a new pain at the end of each session.

Being consistent about time has many advantages for practitioners. If you're usually consistent but find yourself always wanting to go over or under the usual amount of time with a certain client, this can be a sign that you need to look at why you are treating that client differently. It also makes it easier to monitor yourself in other ways. If you want to take extra time with every client, you may be trying too hard, and if you want to cut the session short with every client, you may be approaching burnout.

Even if clients are still experiencing intense emotion or pain, ending close to the agreed-on time can provide comforting structure. Lengthening sessions a great deal because there is still pain or emotion could tell clients that you think you are responsible for their pain rather than that your job is to do your best within a certain time limit. It may also show that you don't trust that the work you've already done will have results or that your clients have other resources as well.

If you have any clients who have a pattern of requesting additional work at the end of a session, it might be a good idea to inform them how much time is left, perhaps about 10 minutes before the end of the session, and ask if they have any areas that need special attention during the remaining time.

What "ending on time" means varies from practitioner to practitioner. Many somatic practitioners don't schedule precisely on the hour or half hour; they allow for a little extra work time on the table, gathering-up time for slow-moving clients, or breathing room for themselves. The amount of time varies from practitioner to practitioner, but 15 minutes is usually enough leeway. Those who are doing emotionally oriented bodywork, such as practitioners of the Rosen Method or the Rubenfeld Synergy Method, are careful to end after an hour because more precise boundaries are needed for work that deals with deep emotional issues.

Being consistent about time doesn't mean that you need to be rigid; sometimes a client is in an unusual crisis. A massage therapist told of taking an extra 30 minutes with a client whose mother had just died. (The therapist

wasn't disrupting other clients' schedules by doing so.) A bodyworker said she scheduled extra time with a client who had come a long distance to work with her. Also, if you are late to a session, you want to make up that time to the client, either that day or at a later time.

It's also a good idea, even if your practice isn't full, to schedule and end sessions on time as if you were solidly booked. It's good discipline, and it shows clients that you value your time. Your practice will run much more smoothly, and your clients will be more secure.

### *Sessions Occur at the Same Time and Place at Regular Intervals*

Although you're not in control of whether your clients come back regularly, be aware of the importance of consistency and try to keep clients in the same time slot. If you have to bounce a client out of a regular time or if you're relocating your practice to a different office, you want to be aware of keeping the other parts of the framework on an even keel. Moves and changes can upset clients without their fully realizing it.

If you work for a spa or a doctor's office, you might try to educate your employer about the importance of consistency for clients. If you felt comfortable doing so, you could let your boss or the scheduler know that you'd like to work with regular clients in the same therapy room each time, for instance.

When you do have to see clients at a time other than their usual one or when you move to a new office or work out of a different treatment room, you may notice that clients behave differently—they may be pickier, more off-balance, more insecure in some way. You may have to make an extra effort to help them feel comfortable. You could make a comment to show them that you understand how unsettling such an adjustment can be. For instance, if they're acting rattled, you could say, "It must feel strange to come in at a different time (or be in a new office)."

### *Nothing Interrupts a Session*

All of these guidelines are based on the central idea that being professional means that the focus is on the client. Clients are paying for your time and attention. You don't want your pager going off, the doorbell ringing (if you work at home), or any other kind of interruption. There are very few good reasons to respond to your cell phone during a session. (Perhaps if you knew that the Nobel Peace Prize committee was going to call during that hour, but even so, you would need to warn the client of a possible interruption!) Make sure you have turned off all your phones and pagers (and whatever other communication devices modern technology comes up with) and ask your clients to do so as well. Some clients will balk at that, but you can at least

make a strong suggestion, letting them know how counterproductive it can be for their pager to go off when they are deeply relaxed.

Practitioners who work at home need to keep the environment as free of interruptions as possible—for example, put a “Do Not Disturb” sign on the front door and advise friends not to drop by and family members not to interfere.



If an interruption is unavoidable (the sink is stopped up, and the plumber is coming), let clients know before the session starts that there may be a brief interruption and that you will make up the time lost. If you know before the appointment time that a session may be interrupted, you can even call clients and forewarn them.

Practitioners should do their utmost to see that no one walks in on a session. Clients will be startled by that, no matter who the intruder is. A friend relates:

One of my most uncomfortable massages was from a woman who worked out of her living room and had a 3-year-old child. Throughout the massage, whenever I opened my eyes, I'd see the curious little girl peeking in. She didn't say anything or actively take her mother's attention, but just having her there took away my privacy.

### *Practitioners Avoid Casual Discussion of Treatment or Sessions with Clients Outside Office Boundaries*

It's a boundary violation to initiate casual conversation with a client about his or her treatment outside a session. When you see clients in another setting, you may be tempted to talk about their last session: “Is your back still sore?” or “I hope you're feeling better.” These may seem like innocent remarks, but when you carry your therapeutic role to another setting, you confuse the boundaries. The safety of your office setting allows clients to relax and show

sides of themselves that they might not ordinarily show, both physically and emotionally. Aside from showing their unclothed bodies, they may, for instance, show a more dependent or needy aspect of themselves that isn't usually part of the face they present to the public. When you see clients at the grocery store and say cheerfully, "Hi, how's your back?" you've just, in effect, dragged their naked and vulnerable body into the store.

When clients see you outside the office and initiate a conversation about the last session or their physical symptoms, it is a great time to practice setting limits. "You broke your toe? Oh my goodness, that's too bad. Give me a call, and let's set up a time when I can see you." Or as you slowly back away smiling, "Oh, how interesting. We can talk about that next time you come in."

Of course, if clients contact you by phone or e-mail and have questions or concerns about previous sessions or their responses to them, you need to answer their questions and address their concerns. You want to set aside time in your workday to respond to such calls. However, you should avoid talking with clients about treatment concerns at public places or social gatherings or any time or place outside your office or outside the time you have set aside to answer or receive business calls.

The Internet has opened up new areas for boundary complications. Some Internet providers have "instant messaging" features that enable customers to know when another customer is online and then "chat" with him. Despite the seeming anonymity of socializing online, Internet boundaries should follow the same guidelines as in-person boundaries. Avoid exchanging anything but minimal social greetings with clients outside the office, even if the connection is electronic. Also, you don't want to send clients e-mails without their permission.

### *Practitioners Carefully Safeguard Clients' Rights to Privacy and Confidentiality*

Nothing that goes on in your sessions—either what clients say or their physical situation or reactions—should be conveyed to others. You shouldn't give others information about a client without the client's (usually written) permission, nor should you repeat anything a client says in a session, no matter how seemingly insignificant. If you are in private practice, the fact that someone is a client should be kept as private as possible. (Situations in which you can make exceptions to confidentiality rules are discussed in Chapter 5.) If you work in a situation where clients will see each other in the reception area, obviously total privacy can't be safeguarded.

The Health Insurance Portability and Accountability Act (HIPAA) sets forth strict confidentiality guidelines that apply to practitioners who use electronic means (faxes and computers) to send information about clients to



insurers for billing purposes or who obtain information about clients from medical practitioners.

It is beyond the scope of this book to discuss these guidelines in detail, and practitioners to whom the HIPAA requirements apply should seek more complete guidelines. However, all practitioners need to be aware of procedures for obtaining permission and guarding privacy.

### OBTAINING PERMISSION

If you work for yourself, along with getting the client's consent for treatment during the intake process, you should have the client sign a permission form that enables you to obtain information about the client from other health-care practitioners and give information about the client to other health-care practitioners, as needed. If you plan to discuss your clients in supervision or consultation, you should also have written permission from the client to do so. Keep in mind that the client has the right to refuse to give permission. You should also give clients a written statement of your privacy and confidentiality policies, letting them know that you will safeguard all information about them. Ideally, if you work for someone else, that establishment should maintain good policies on confidentiality as outlined in this section and the following one on guarding privacy. However, once you take a job, you may not have control over such policies.

For reasons of their privacy, you or your employer should have clients' permission to call or send e-mail or regular mail to their home or office. Let them know that on some occasions you may need to cancel or change an appointment and ask them how they would like to be contacted. If you are trying to reach a client and must leave a message with someone other than the client or on a shared answering machine, do not identify yourself as that person's massage therapist (or polarity therapist, etc.).

If you send marketing pieces or special offers in the mail, it's best to get written permission from your clients to send them material. Use a form that the client can sign for all of these permissions so that you can keep a clear record of them.

### GUARDING PRIVACY

It's important that no one else has access to information about your clients without your consent. Keep all information about clients in a locked file or some place that others cannot get into, and keep your appointment book and clients' checks out of public view. Staff members such as receptionists also need to know how to keep clients' information private.

Respecting confidentiality also means that arrangements should be made so that people walking by your office door can't overhear the talk during a session. An easy way to block sound is to use a machine that makes white noise. You can also use a solid door, a double door, or a door with

soundproofing at the bottom and top. Double doors—adding another door that hinges on the other side from the one already there—are also helpful for privacy. In a busy office, they give you a way to come and go without accidentally giving someone in the hall a glimpse of the client.

### *Clients Are Unaware of Each Other*

Some therapists who do classic psychotherapy or psychoanalysis arrange their schedules and office entrances and exits so that clients don't see each other. One client leaves from one door at 10 minutes to the hour, and the next one comes in a different door on the hour. The goal is to maintain clients' privacy and cut down on the potential for their imaginings about the therapist's relationship with other clients.

I know of no somatic practitioners (and few psychotherapists) who separate clients' entrances and exits. Most don't even think to schedule clients so that they arrive and leave without seeing each other. But it's a good idea. You don't know how it will affect one client to see you being warm and friendly as you say good-bye to the previous client at the door; it may mean nothing, but it may stir up the client's insecurity.

A colleague reports:

Waiting to get a session from a much-loved bodywork teacher, I saw him walk out of his previous session with his arm around his client, chatting in a friendly way. I felt great annoyance and dismay and watched myself spin off into a negative internal monologue: "He doesn't do that with me. He likes that other client better than he likes me. He probably doesn't like me at all."

Because my colleague had a solid history of trusting that teacher, her reaction didn't last and the situation didn't interfere with the session, but it could have been disruptive. It could have been one of those sessions when the practitioner didn't understand why the client was being "difficult."

Arranging for clients to leave without bumping into someone else is also considerate of the fact that, as they leave your office, they're not always in a frame of mind to deal with other people. They may think their hair looks messy, or they may be tearful or not in a state to want to make polite chitchat.

Depending on your work situation, you may not be able to isolate clients from each other. Keep in mind that the main goal is for clients to be unaware of your professional relationships with other clients. For this reason (and for confidentiality), you don't name your clients to each other. Even if you don't say another client's name but give information about her, it gives the impression that you are loose with clients' privacy, and it takes the focus off the present client. Occasionally, it might be reassuring to a client to hear that others have

the same kinds of problems. For instance, you could say, “I’ve noticed that many of my clients seem more tense during the holidays.” However, in deciding whether to make such a comment, you should be motivated by what is best for the client. Create a setting in which each client knows that he or she is the most important person in your (work) life for that hour. There’s probably not a client in the world who is interested in seeing his practitioner warmly embrace another client or hearing him talk about another client. Why run the risk of stirring up something that will interfere with the client’s trust?

### *Practitioners Don’t Ask Clients to Attend to Their Needs*

It’s never appropriate to ask clients to take care of you—even in the smallest way. A practitioner might be tempted to ask for such care in an obvious way, such as trying to get sympathy about a difficult divorce or asking for advice about a client’s area of expertise. Also, practitioners with good intentions may have the misguided idea that it’s friendly or somehow helpful to clients to be open with them about personal issues. Actually, it can be a distraction in what is *their* time. What is truly helpful to clients is giving them your full attention, not bringing your personal life into the session and not asking paying customers to give out emotional support or free advice.

*It’s never appropriate to ask clients to take care of you—even in the smallest way.*

There are subtle ways you may be asking clients to take care of your needs. You might say things such as, “Boy, I’ve had a rough day,” “I don’t like this hot weather,” or “I was up so late last night.” Even these subtle messages can create problems. Maybe you’ve had a hard day, but so have they—they’re counting on you to help their day be easier. When they hear something that sounds like you’re not up to snuff that day, it can interfere with their ability to let go and focus on their own experience, and they may fear they’re not going to get their money’s worth.

Clients are paying you to put aside your personal needs and do what’s best for them. Personal revelations from the practitioner can be off-putting. They may begin to see you, in small ways, as needy and inadequate to handle their problems. They may also get the mistaken idea that you want to have a personal relationship with them.

You’re not being deceptive when you keep your personal needs out of sessions; it’s just good professional manners. You’re not arrogantly pretending that you don’t have needs; you’re simply being appropriate to the professional setting.

### *Framework with Clients at Different Stages*

When is framework important? Although clients may be at different stages in their relationships with us or have particular needs, the importance of framework doesn’t change. As the following examples suggest, framework is important to all of our clients.

### *New Clients*

The first appointment is crucial for setting a professional tone. Clients put off by sloppy framework in the first session simply don't come back. There are no second chances. With a regular client, if you are late, have a messy office, or make an inappropriate comment, the client will probably dismiss it as a momentary lapse. But with a new client who can judge you only by that one appointment, such carelessness can imply indifference or incompetence.

### *Regular Clients*

Regular clients get used to their routines, and their hour may feel like a safe haven. Avoid taking clients out of their patterns. If you have to change the framework—move offices or raise fees, for example—be sensitive in presenting those changes. You need to give clients ample notice (a month or two) about major changes. If your employer is in charge of the framework and makes changes, it can be helpful for you to mention to the client that you notice that things are different and then ask them how the change is affecting them.

### *Clients of Structural Bodywork or Deep Emotional Work*

In deep structural bodywork, when clients' physical (and emotional) patterns are shifting, they need a stable therapeutic environment. The same holds true for psychologically or emotionally oriented bodywork. The more you expect the client to access deep emotional material, the more care you need to take with framework.

### *Mentally Disturbed Clients*

If you're working with clients whose internal process is chaotic, you need to be more attentive to external boundaries. This can be difficult because these clients' own sense of boundaries is usually so scattered that they tend not to honor yours. They may want special exceptions, as in the following case:

A colleague working with a mentally unbalanced woman reported that his limit-setting abilities were challenged when the client requested that he lower her fee, give her a ride to the session, and work only with one specific area, even though the practitioner's methods called for a whole-body approach.

Some mentally unbalanced clients will be outside your abilities to work with, and you will need advice from a mental health professional to help you refer them on. However, with others, gentle firmness and consistency are enough to settle them down.

### *Clients Who Are Traumatized or in Pain*

Fear and pain make us more sensitive to orderliness and kindness in the environment. Clients who have experienced a good deal of trauma in their lives may be vigilant and watchful, expecting danger at every moment. Clients frightened by chronic physical pain are like wounded animals that have retreated into a corner. Both kinds of clients can be hypersensitive to any perceived imbalance in the therapeutic relationship. Small framework errors or lapses in attention can make them think we are incompetent or indifferent. Such clients are grateful for good boundaries.

### *Clients with Whom You Have Another Relationship*

You can be tempted to be careless about framework with people you know: “I don’t have to have the room ready—it’s only my buddy Bob.” You actually need to be *more* crisp with your boundaries in such cases, to help friends with the confusion of switching roles.

### *Clients Who Have Been Sexually Abused*

Extra attention to framework is necessary for clients who have been sexually abused. At the same time, because their own boundaries may be confused, they may push the edges—being flirtatious with you or asking for special treatment. To keep your boundaries safe enough for these clients, part of your framework should include supervision from a mental health professional.

## **Ending the Professional Relationship: Achieving Closure**

You want to do your best to end your professional relationship with clients on a positive note. Leaving clients with negative feelings could color how they evaluate their entire time working with you or leave them with bad feelings about the profession in general.

### *Contacting Clients Who Quit*

Sometimes when regular clients suddenly stop making appointments without giving a reason, you may wonder whether to contact them. You may be concerned that you have somehow offended them or made them uncomfortable. Generally, when clients stop coming and you have decided to contact them, it’s a good idea to write a note (handwritten, not e-mailed) and say that you’ve noticed their absence and that you hope they’re doing well. If you have reason to believe you’ve offended them, you can say that you hope that you haven’t inadvertently offended or upset them and that you’re open

to talking about any concerns they might have. A note is less confrontational than a phone call and easier for both practitioner and client to handle. If you work for someone else, you will have to follow their policies about contacting former clients.

When a regular client stops seeing you abruptly, your decision about what to do may be influenced by your personal feelings. You may, for instance, feel angry, rejected, or just plain disappointed. If you're confused about what to do or say or if you have many feelings about this client's leaving, it would be a good time to talk with a trusted teacher or colleague in a confidential setting to help sort out your feelings. You might even consult with a professional who is knowledgeable about interpersonal dynamics—such as a counselor, psychotherapist, or bodyworker who has psychological training—to help you clarify your response to the situation. (Such a consultation wouldn't involve delving into personal issues as you would in psychotherapy. It would only help you with smoothing out issues that get in the way of good relationships with clients.)

### *Moving Out of Town and Ending Your Practice*

If even small changes in framework are disruptive to clients, what is it like for them when you leave town or end your practice? If you terminate with clients carelessly, you may leave them with a bad feeling about the whole experience of working with you.

You want to give clients adequate notice so that they can get used to the idea of their sessions ending and have time to express their feelings, whether those feelings are anger, rejection, gratitude, or some combination. If you are able, 2 months is a good amount of time to give notice. You can send notes to clients who don't come in regularly so that they don't have a rude surprise when they call for an appointment. Also, be prepared with names of other practitioners to whom you can refer them.

For practitioners too it's often emotionally difficult to leave; you may be grieving the loss created by the change or feeling guilty, as if you were abandoning your clients. During this time, getting support from trusted teachers or a professional trained in psychological dynamics can help make the transition smoother so that you can more effectively help clients—and yourself—weather the change.

### *Bending Framework: A Red Flag*

A good reason for being consistent with boundaries is that you will be more inclined to notice when you alter them. It's a red flag when you step outside your usual framework. When you bend your professional boundaries, you encourage others to treat you as if you're not a professional.

When boundaries become like Swiss cheese, clients can fall through the holes. Les Kertay, clinical psychologist and former chair of the Rolf Institute's ethics committee, says that making special exceptions for clients is always a red flag for practitioners. One of the main ways people get into big trouble with clients (ethics complaints, for instance) or even small trouble (the client doesn't come back or becomes a "difficult" client) is through treating the client as special in some way.

*When boundaries become like Swiss cheese, clients can fall through the holes.*

A colleague relates:

There has been only one time in my 20 years of practice when I didn't get paid—and it was a client for whom I had made exception after exception. I allowed my judgment to be clouded for several reasons: she had a large area of scar tissue on her chest and neck from a traumatic childhood injury, she said she was in a great deal of pain, and she was a struggling single mother.

Rushing in to rescue her, I discounted my fee substantially and would see her at times when I didn't usually schedule sessions. She never seemed to get relief from the pain, and that would double my desire to fix her. The last time I saw her, I agreed to work on my birthday, although I had planned to take the day off. To make it worse, I was giving her a discount. At the end of the session, she said she didn't have any checks with her and that she would mail me the fee. That was the last I heard from her. Stuffed on my birthday—it's a lesson I remember. I had created a framework disaster.

Would it have been hard-hearted not to make an exception for a client in great pain? You want to distinguish between a client who is sincerely in a crisis and a client who has a pattern of being manipulative. That can be a difficult judgment call, but there are often clues. For example, a client may call and say that she is in terrible distress and must be seen right away. If the practitioner says, for instance, "I can't see you Sunday, but I have an opening at 10 a.m. on Monday," and the client responds, "Oh, I can't then. That's when I get my hair cut," or needs to take the dog to the vet, or provides another seemingly flimsy response, the client isn't being straightforward. Other clients may describe awful pain and want to be seen immediately, but when the practitioner asks how long they've had the pain, they'll say, "Six years." Their pain may be real, but you may not need to rearrange your schedule to see them right away.

You don't do clients a favor when you let them hook you into ignoring your own framework policies. You also don't need to judge clients who want to be treated in a special way. The client in the case above who didn't pay was simply dealing with a difficult situation in an unhealthy way that she'd learned a



long time ago. It was a mistake for the practitioner to continue to treat her in a special way, and it wasn't helpful to the client. People heal best when they have a safe container, and this client never knew where the boundaries were.

If someone has been injured or is in emotional crisis, depending on the circumstances and your schedule, you may want to make an exception for him or her. Special exceptions need to be carefully considered and consistent. Experienced practitioners develop their own guidelines about what circumstances will warrant bending the standard framework, and they then avoid going outside their own rules. Firm framework saves energy and stress and provides comfort for both practitioner and client.

### Framework Matters

What individual clients need to feel safe varies. There are guidelines, such as confidentiality, that are universally part of a professional code. Others may lend themselves to flexibility. For instance, in some cases, because of either the practitioner's personality or the client's, a cluttered treatment room may not make a difference. In other cases, messiness could make a client uncomfortable. The ultimate authority for framework is the client's experience. Does what you do make your clients tense or help them breathe easier?

Maintaining a stable framework also benefits you. An inconsistent framework—variations in how long sessions run or special deals with fees, for instance—is energy consuming for practitioners.

Although you want to be consistent and stable in your framework, experienced practitioners know that total consistency is an ideal rather than a reality. The point is not to become rigidly locked into rules but to know that framework matters and to thoughtfully consider the ways you manage the nuts and bolts of your practice.



### QUESTIONS FOR REFLECTION

- 1 As a prospective client of a somatic practitioner (or other professional), has your decision regarding whether to make an appointment ever been strongly influenced, pro or con, by the practitioner's demeanor during the initial phone conversation? What made the difference?
- 2 Has the appearance of a manual therapist's office or work environment ever been off-putting for you? What made you uncomfortable?

- 3 In your work life, have you ever made an exception for a client or customer and then been sorry you did? What happened, and what motivated you to make that exception? What did you learn from that experience?
- 4 Why do you think we need consistency in this work?
- 5 Have you ever chosen one professional (or any kind of service person such as a plumber or car mechanic) over another because of their attention to framework details?