

Strategies for Managing Challenging Interactions



Team members who assist individuals seeking help with Medicare and related services can experience emotionally charged or complex interactions. Individuals contacting assistance programs may experience a range of emotions, including frustration and confusion. It could be that their provider is no longer in their plan's network, or that they received a bill from a doctor for a service they thought was covered. They may be experiencing financial stress, health concerns, or difficulty navigating benefits, such as with Medicare and Medicaid. These circumstances can lead to difficult conversations that require strong communication skills, empathy, and clear professional boundaries.

This tip sheet highlights practical strategies for navigating difficult interactions, maintaining professionalism, and supporting well-being. The approaches outlined here draw on practices used across aging and disability network programs, including SHIP and SMP counseling programs, as well as community navigation services.

Understanding Challenging Interactions

While many individuals appreciate the assistance they receive, challenging interactions sometimes occur. These interactions generally fall into two categories: difficult and abusive situations.

Difficult Situations

In these situations, a person's emotions or behavior stem from a stressful circumstance rather than hostility toward a team member. For example, a person may express:

- Frustration or anger after contacting multiple agencies or organizations without receiving help
- Emotional distress or crying
- Anxiety about coverage, costs, or eligibility changes
- An urgent personal or crisis situation

Abusive Situations

In some cases, behavior becomes abusive toward staff and volunteers, such as:

- Derogatory remarks about a team member's identity or personal characteristics
- Sexually inappropriate comments
- Threats or harassment

Challenging vs. Abusive Situations
A difficult interaction may reflect the stress someone is experiencing. Abusive behavior, however, crosses a line and requires clear limits and organizational support.

Agencies and organizations should have policies and procedures to address abusive interactions and support team members in maintaining safe and respectful communication environments.

Resetting Expectations

A key part of SHIP and SMP work is helping individuals understand what services or benefits are realistically available. People may contact programs expecting a specific outcome, such as direct assistance with an application or immediate resolution of a potential fraudulent claim. In some cases, programs may not be able to provide the exact service the person expects.

The goal of the conversation is to help individuals connect with the most appropriate and realistic service or benefit available to them. Strategies for resetting expectations include:

- Clearly explaining the program and your role
- Being transparent about what can and cannot be provided
- Avoiding false promises or unrealistic timelines
- Focusing on available alternatives and next steps

Tip: Even when you cannot provide the service someone expects, offering clear next steps can help maintain trust and reduce frustration.

Success in difficult conversations often means helping someone move toward the best available option—even if it isn't the option they originally expected.

Preparing for Difficult Conversations

While we generally do not know whether a call or interaction will lead to a challenging situation, preparation helps a specialist remain calm and focused when one arises. Consider the following strategies in advance of a hard conversation.

- Have a plan. Think through how you'll respond or react if a conversation becomes emotional or confrontational.
- Gather information. Identify what you already know and what you still need to learn.
- Listen to understand. Active listening helps people feel heard and respected.
- Validate emotions. Acknowledge the person's experience without agreeing with inappropriate behavior.
- Focus on the goal. The goal is to connect individuals with the best available service or options based on their situation.

Example validating statements:

- “It sounds like you’ve been dealing with a really frustrating situation. It’s understandable why this would feel overwhelming.”
- “I can see how important this is to you.”

If you do not know the answer to a person’s question, let them know you would like to research the issue. Ask if you can call them back and schedule the day and time to follow up.

Having a plan for difficult situations helps counselors and other team members respond consistently and confidently.

Balancing Empathy and Boundaries

Many individuals seek help during periods of vulnerability, crisis, or uncertainty. SHIP and SMP work requires balancing compassion with professional boundaries. Healthy boundaries help ensure that individuals receive accurate information, that counselors and other team members remain within their roles and program guidelines, and that services are delivered consistently. SHIP and SMP team members may find it helpful to ask themselves:

- Is this in the individual’s best interest?
- Is this within my role and program guidelines?
- Would a colleague handle the situation the same way?

Using Empathy to De-Escalate Conversations

Empathy can help calm tense interactions and keep conversations productive. One effective approach is **cognitive empathy**, which involves recognizing another person’s perspective while maintaining professional composure.

Effective empathetic communication includes recognizing and acknowledging emotions; remaining calm and respectful; and redirecting the conversation toward solutions.

Examples:

- “I hear that you’re frustrated. Let’s look at what options might be available.”
- “That sounds like a difficult situation. Let’s walk through the next steps together.”

Setting Limits During Difficult Interactions

Team members deserve to be treated with respect. When conversations become abusive or inappropriate, it is appropriate to set clear limits. One approach is a **three-step method**:

1. Set the boundary. “I want to help address your concerns, but I can’t do that when offensive language is used.”

2. Restate the boundary and provide a warning.

“I understand you’re upset, but if the language continues, I will need to end the call.”

Tip: Clear boundaries protect both counselors and other team members, and the individuals they serve.

3. Follow through if necessary. “Since the language is continuing, I’m going to end this call now. You are welcome to call back when you’re ready to continue respectfully. Thank you and take care.”

Recognizing Personal Triggers

Certain situations or behaviors may feel especially challenging for specialists. These “buttons” might include discriminatory remarks, manipulative behavior, or repeated demands. Preparing for these situations can help staff and volunteers respond thoughtfully rather than react emotionally. Helpful strategies include pausing before responding, taking a slow breath, reminding yourself that the situation is not personal, and refocusing on the goal of the conversation.

Supporting Well-Being

Responding to challenging interactions regularly can be emotionally demanding. For supervisors, supporting the well-being of counselors and other team members is essential to maintaining effective services and preventing burnout. Organizations can support their team by:

- Promoting psychological and physical safety in the workplace
- Encouraging teamwork and connection
- Providing training and professional development
- Supporting work-life balance
- Recognizing team members’ contributions and accomplishments

A supportive workplace helps counselors and other team members remain engaged, resilient, and able to provide high-quality assistance. Supporting team member resilience strengthens the SHIP and SMP networks and improves outcomes for the people seeking assistance.

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