



Communicating with Clients and Paraprofessionals

Occupational
Standard Title

DISCUSS FITTING APPROACH AND LIKELY OUTCOMES, AND MAKE REFERRALS

Overview

Correct and comfortable fit can support significant change in the experience of horse and equestrian but must be applied with due consideration within the context of good management of horse and human.

This standard is about how to discuss findings, options, and outcomes with clients, setting out the duration and likely cost of recommended actions and reasonable outcomes. Often a client will need support to manage other aspects of horse and equestrian care. The Equine Fitter should be able to refer to, or to guide the client to identify, suitable practitioners.

You may also refer to:

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| EFCC01 | Coach client to monitor and maintain safe and correct fit of saddlery and livery |
| EFCGS01 | Manage appointments and deliver customer service |
| INSCS026 | Monitor and solve customer service problems |
| INSML003 | Develop and maintain your professional connections |
| LANCS4 | Establish and maintain working relationships with others |



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Performance Criteria

You must be able to:

- P01 Work professionally, ethically and within the limits of your authority, expertise, training, competence, and experience
- P02 Comply with relevant animal health and welfare and animal-related legislation and codes of conduct and practice
- P03 Work in accordance with relevant consumer legislation
- P04 Present yourself and communicate in a professional manner, using appropriate language and terminology
- P05 Establish a rapport with the client and other persons present
- P06 Work sympathetically and with due consideration and respect for the client, other persons, and the horse.
- P07 Take and record a thorough history of horse and human, and record measurements as per your training and good practice
- P08 Discuss and record the client's aims for the future
- P09 Where appropriate, ask questions to identify financial, time, ability, and commitment constraints
- P10 Assess what change or development may reasonably be expected over a set period and communicate your findings
- P11 Identify the fitting steps necessary to safely and sympathetically achieve change
- P12 Discuss with the client the expected frequency and cost of recommended appointments, goods, and services
- P13 Agree and record the actions and costs
- P14 Explain and record your reasons when a fitting appointment, or a stage of the fitting process, must be halted, and the criteria and costs associated with resuming fitting.
- P15 Make referrals to suitable equine and human practitioners



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Knowledge and understanding

Suitability of a horse and rider/driver for certain activities

You need to know and understand

K01	How to assess horse conformation, anatomy, physiology, movement, training level and fitness for a given task
Scope and range	<ul style="list-style-type: none"> • Within the scope of your role to assess how a horse may develop and sustain the ability to perform a given task • Recognise abnormal or atypical signs and refer to veterinary surgeon or chartered professional
K02	How to assess and sensitively communicate any deficits in rider or horse capacity to achieve goals
Scope and range	<ul style="list-style-type: none"> • For example, for reasons of health, fitness, ability, behaviours
K03	When it is not appropriate for a horse to be ridden or driven and how to communicate to a client why an appointment or stage of the process cannot go ahead.

Communicate clearly

You need to know and understand

K04	How to clearly set out the commitment and costs required to achieve a required outcome
Scope and range	<ul style="list-style-type: none"> • Number and frequency of visits • Appropriate equipment, costs and where it may be sourced
K05	How to sensitively and objectively share findings
Scope and range	<ul style="list-style-type: none"> • Fitness, size, or weight of horse or rider, and management thereof if appropriate • Concerns about soundness or health of the horse and referrals to a veterinary surgeon • How outcomes are limited by the fit or condition of equipment
K06	The importance of agreeing reasonable goals
Scope and range	<ul style="list-style-type: none"> • Setting achievable goals protects the wellbeing and safety of horse and equestrian



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Work ethically and professionally

You need to know and understand

K07	That an Equine Fitter must always put the welfare of the horse and safety and wellbeing of the rider/driver above commercial or reputational advantage.
K08	Responsibilities under relevant environmental, health and safety, and welfare legislation, and codes of conduct and practice.
K09	To gain permission before client details are shared
Scope and range	<ul style="list-style-type: none"> • Before discussing a case with equine or human practitioner. <p><i>If you feel a horse is at risk you may talk to a welfare charity representative without sharing details of the responsible person, horse, or location.</i></p>
K11	The importance of keeping full and complete records in accordance with relevant organisational codes of practice and legislation
Scope and range	<ul style="list-style-type: none"> • Records must be clear and associated with a client and horse • Records must be dated and signed • Records must be kept securely and confidentiality



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