



Career Advisor Training Course

Modernized to Include Practical Ways to Integrate AI Responsibly

Fri, Oct 9, 2026 | 10 AM PCT - 2.5 hours

Presenter:
Wanda Kusumajuda Pichette (Wanda KP)

Lead Career Development Educator & Founder of Grow Career Development





Session Agenda

Overview of Job Search Strategies
Conducting Effective Client Intakes
Career Planning & Career Transitions
Maximizing Client Services to Meet KPIs



**Slides will be available
after the session**

Overview of Job Search Strategies



Overview of Job Search Methods

Basic job search methods often involve *reactive approaches*

Limitations of Basic Methods:

- High Competition: Many people apply for the same jobs (employed & unemployed); challenging to stand out.
- Reliance on Posted Jobs: Job seekers only have access to roles actively advertised; missing out on “hidden” opportunities.
- One-Way Communication: no opportunities to demonstrate personal qualities and create rapport with potential employers.



Overview of Job Search Methods

Methods include:

- Online Job Boards (Indeed, LinkedIn, Monster)
- Company Websites (Career Pages, Company Updates)
- Recruitment Agencies (Industry-specific, short-term, temp)
- Social Media (following company pages, joining groups)
- Networking with Existing Contacts (past colleagues, referrals)
- Job Fairs and Career Events (multiple employers in one place)
- Signing Up for Job Alerts and Email Subscriptions



Advanced & Strategic Job Search Methods

A more strategic job search uses a ***proactive approach*** focusing on uncovering the *hidden job market* and creating opportunities.

Benefits of Strategic Methods:

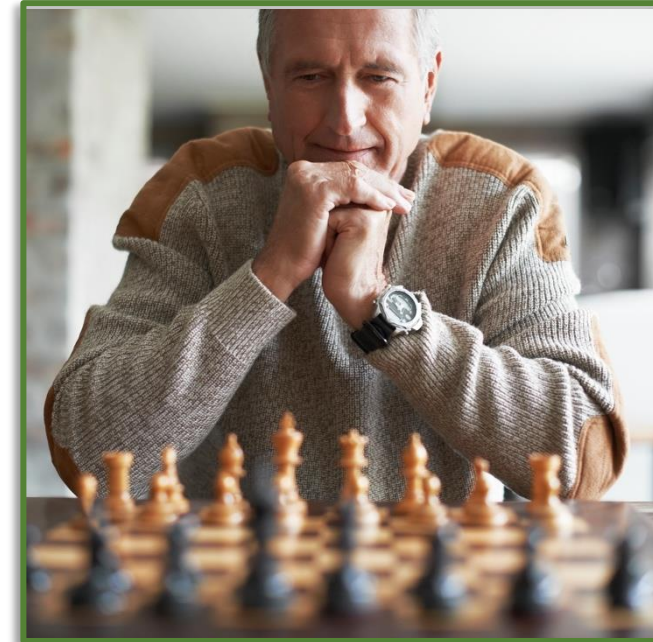
- Access to Unadvertised Jobs (Hidden Job Market)
- Reduced Competition & Enhanced Visibility: Clients build reputation and gain visibility, making it more likely they'll be considered for future openings.
- Building Long-Term Career Relationships: Strategic methods allow clients to foster relationships that can lead to mentorship, guidance and job referrals over time.



1. Cold Outreach

Proactively reaching out to companies of interest to express interest in the field and inquire about potential opportunities.

- Use the yellowpages.ca website, make a list of companies in areas the client wants to work in
- Before cold calling the companies to inquire about job openings, clients should conduct research on the website.
- Coach clients on timing for cold calling, phone techniques and prepare for possible objections.
- Meet directly with employers by walking into the store or office

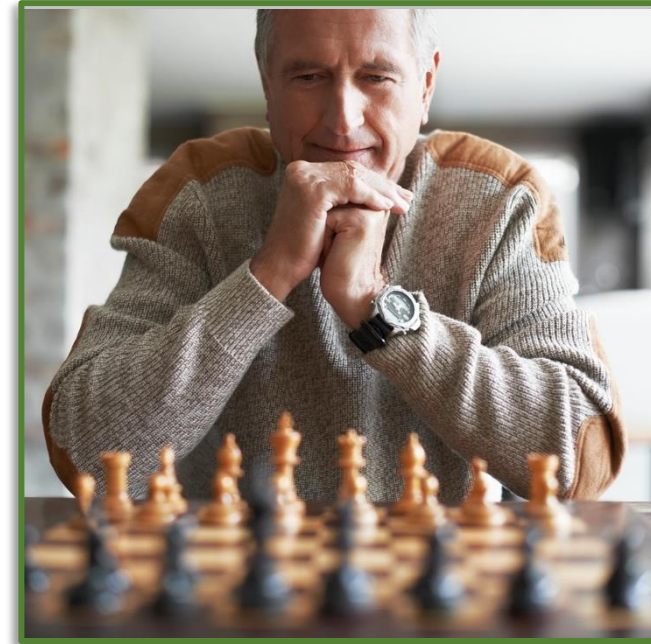


2. Informational Interviews

Informational interviews allow clients to speak with professionals about their career paths, roles, and industry knowledge.

Unlike traditional interviews, these meetings are focused on learning and building relationships, not securing a job directly.

Clients gain a clearer understanding of the realities of a particular role, industry trends, and necessary skills, helping them refine their job search strategy and career goals.



Informational Interviews (continued)

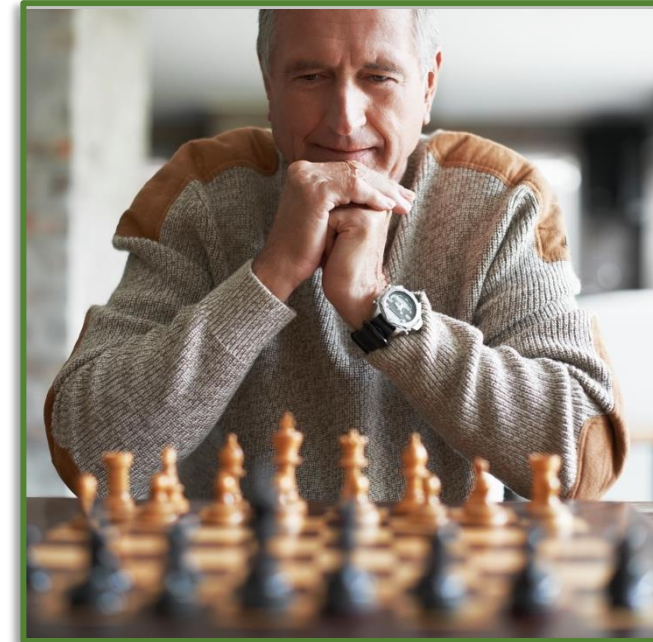
Benefits of Informational Interviews:

- They offer a unique, insider view into the day-to-day realities of the industry, which can help clients align their job search with industry needs.
- Speaking with employees provides clients with insights into the company's work environment and values, helping them determine if the company is a good fit.
- Informational interviews add valuable contacts to a client's professional network, increasing the likelihood of future job leads, mentorship, or referrals.



3. Networking and Relationship-Building

- Building connections within the industry the client is in or wants to work in. By engaging with contacts directly, clients can create new opportunities and access unadvertised job openings.
- Identifying professionals in their target industry, such as mentors, alumni from their school or individuals in roles they aspire to.
- LinkedIn and industry-specific events are valuable tools for finding these connections.



3. Networking and Relationship-Building (continued)

Effective Networking Techniques:

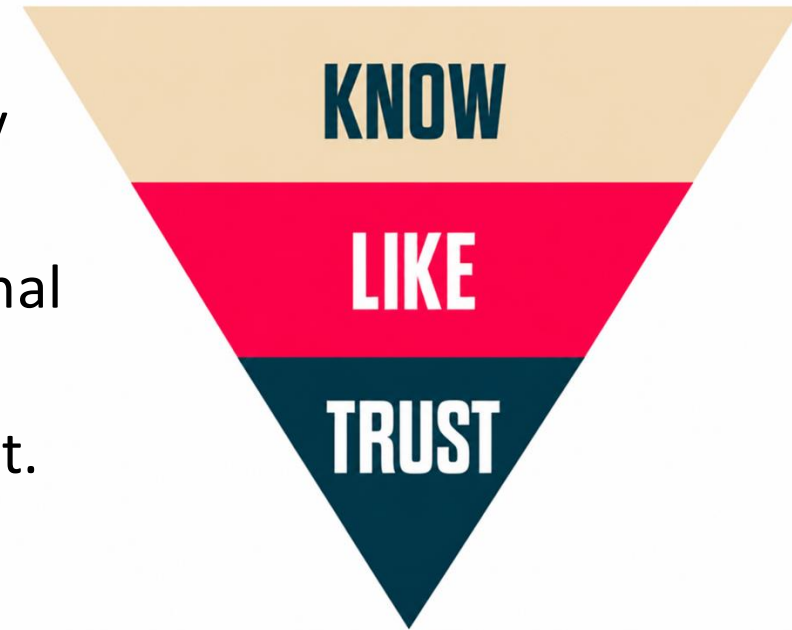
- Networking events provide a natural setting for introductions and gives clients a chance to make a memorable impression.
- After meeting someone, clients should follow up with a brief thank-you message or LinkedIn connection request, mentioning the event or shared experience.
- Regular follow-ups to share relevant articles or congratulating them on achievements—can help maintain the relationship over time.



Networking and Relationship-Building (continued)

Building a network using the **Know-Like-Trust** principle:

- The first stage, **knowing you**, is all about creating visibility around who you are and what you do
- The second stage, **liking you**, is all about building a personal connection with potential clients.
- Finally, the third stage, **trusting you**, is the most important. Building trust is the foundation of any successful business relationship.

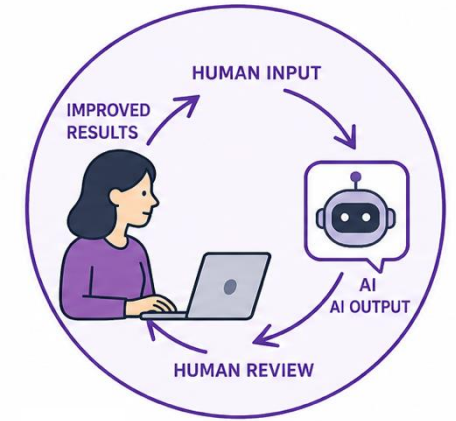


<https://www.linkedin.com/pulse/know-like-trust-klt-trevor-johnson/>

Using AI Responsibly for Job Search

Useful AI Prompts

- I am seeking employment as a [target occupation] in [location]. Identify 5 types of employers that may need my skills, including those not actively advertising. Suggest ways to research employers, connect with decision-makers, and develop a 2-week networking strategy.
- I have been searching for a [target occupation] in [location] for [X months], using [job search methods], with [X applications] and [X interviews]. Identify possible weaknesses in my approach and recommend 5 measurable improvements to test over the next 30 days.



Conducting Effective Client Intakes



Conducting Effective Client Intakes

In most government-funded programs, the clients coming in for an official intake appointment with their Case Manager/Career Advisor have already been assessed/screened for eligibility.

We are going to focus specifically on the ***first intake appointment with a new client*** and how to setup an effective relationship with the client in the process of conducting the appointment.

Note: we will not discuss clients completing government forms and consents etc., but this is key as well.



Conducting Effective Client Intakes

Key elements to accomplish during the first intake appointment:

1. Listen to clients' perceptions of themselves and their understanding of their problems.
2. Explain the parameters of the employment program outlined by the Funder & Program Management.
3. Confirm & convey understanding of what their needs are and how the program can specifically be able to help them.
4. Establish the ground rules and how you will work together effectively during the duration of the program.
5. Provide value to the client before ending the meeting.



Conducting Effective Client Intakes

1. Listen to clients' perceptions of themselves and their understanding of their problems.

- Clients often have a perception of themselves and the current problems they are having in finding employment.
- It is important to focus on listening to the client and only asking clarifying questions during this stage.
- Sometimes at this stage a client will divulge information that raises red flags regarding their program eligibility or other concerns.



Conducting Effective Client Intakes

2. Explain the parameters of the employment program outlined by the Funder & Program Management.

- After listening to the client, we can now clarify the parameters of our program, the expectations of the funder and/or program management and explain the process and the services provided.
- At this time, it is important to establish what the client needs to do to maintain eligibility in the program.



Conducting Effective Client Intakes

3. Confirm & convey understanding of what their needs are and how the program can specifically be able to help them.

- To develop buy-in, this is a good time to show them you were listening and call back on what the client said they need help with - and explain how the program will help them overcome their barriers to employment.
- Discussing the client's needs and explaining to them at what stage of the program that will come is very important, especially if what they want comes at a later stage of the program.



Conducting Effective Client Intakes

- For example, “I want someone to introduce me to employers.”
“We can definitely do that, however we will need to make sure you are ready i.e. you have a finalized resume and have practiced interviewing before we introduce you to our Employer Liaison.”



Conducting Effective Client Intakes

4. Establish the ground rules and how you will work together effectively during the duration of the program.

- Hopefully by now the client sees the benefits of the program and wants to move forward.
- Discuss the client-practitioner relationship:
 - Be clear that the client needs to actively engage in job search activities to stay in the program (resume, cover letter, mock interview, sending applications).
 - Explain how participation in services are building blocks towards more advanced services; and them being active can move that along faster.



Conducting Effective Client Intakes

- Explain that maintaining contact with the program is their responsibility to demonstrate engagement, not the Career Advisor/Case Manager's responsibility.
- Clarify preferred ways to communicate:
 - Does the client feel comfortable with receiving information via email, how often do they check it?
 - Does the client prefer to be contacted over the phone and what are the best times?
 - Explain to the client the best way to contact you in the office.



Conducting Effective Client Intakes

5. Provide value to the client before ending the meeting.

- In preparing for the intake appointment, spend at least 5-15 minutes reviewing the client's preliminary file and building a basic picture of what the client might need assistance with.
- To provide value during the appointment, look up labour market information, job descriptions and job postings that may be relevant to show or discuss with the client.
- During the appointment some of the basic picture of the client could change however some of the info found beforehand could still be relevant. Explain or give some of this information to the client to review before ending the appointment.



Career Planning & Career Transitions



Career Planning Basics

Career Planning is an in-depth process of self-reflection, goal-setting, skill development, and job search strategies that helps individuals align their careers with their interests, values, and opportunities.

While career planning can be a lengthy process, ***case management often prioritizes targeted, practical support within a shorter timeframe.***

Case management career planning typically emphasizes immediate action, such as clarifying goals, addressing barriers, and providing direct job search support.



Career Planning Basics

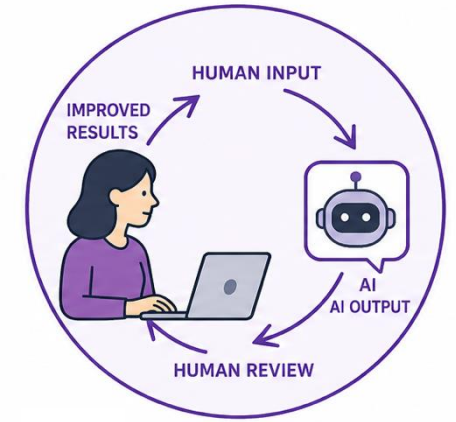
Clarifying Goals: Helping clients define short-term career objectives based on their current situation, qualifications, and job market realities.

Addressing Barriers: Identifying and resolving challenges such as credential recognition, gaps in work experience, lack of job search skills, or personal circumstances (e.g., childcare, transportation).

Providing Direct Job Search Support: Assisting with resume writing, interview preparation, networking strategies, and accessing job opportunities through referrals or employment programs.



Using AI Responsibly for Career Planning



Useful AI Prompts

- Act as a Canadian Career Development Advisor. I have [X years] of experience in [industry] and strengths in [3–5 skills]. Suggest 5 alternative careers that use my transferable skills. Identify additional qualifications, potential barriers, and career prospects in [location].
- I want to become a [target occupation] in [location]. My background includes [education, experience, and skills]. Compare my qualifications with typical employer requirements. Identify my strengths, transferable skills, and key gaps I need to address.

Understanding Career Transitions

Differentiation: Job Changes vs Career Transitions

Job Changes: Refers to a change in employer, position, or role, often within the same industry or career path.

- Typically involves external changes, such as new tasks, colleagues, or work environments.
- Examples: Switching from 1 company to another as a software developer or moving from a mid-level to senior-level role.
- **Support:** Focus on external factors, such as improving resumes, networking, and preparing for interviews.



Understanding Career Transitions

Career Transitions: A broader, more significant process that involves a shift in identity, values, or professional goals.

- They can be voluntary, such as pursuing a new passion or seeking better work-life balance.
- Or involuntary, such as being forced to change careers due to job loss, organizational changes, licensing needs etc.
- Often includes internal and psychological changes as individuals let go of an old role and adapt to a new one.



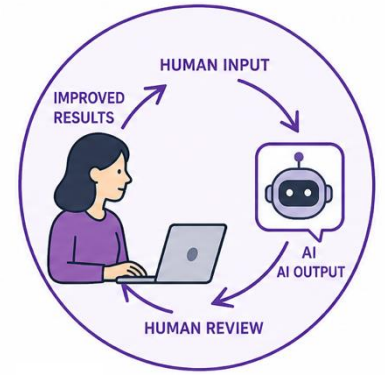
Understanding Career Transitions

Career Transitions (continued):

- Examples: A teacher transitioning to a corporate training role, or an architect becoming an AutoCad Drafter.
- **Support:** Dive into deeper psychological challenges, such as addressing fears, building resilience, and aligning new career paths with personal values and goals.



Using AI Responsibly for Career Transitions



Useful AI Prompts

- I am considering transitioning from [current occupation] to [target occupation] in [location]. My skills, goals, and circumstances include [details]. Compare both careers using labor market trends, employment prospects, and qualification requirements. Identify potential risks and opportunities to help me make an informed decision.
- I want to transition from [current occupation] to [target occupation] in [location]. My available time, budget, and relevant skills are [details]. Suggest a realistic 90-day transition plan, including skill development, networking, and labour market research. Identify reliable Canadian sources to verify your recommendations.

Maximizing Client Services to Meet KPIs



Maximizing Client Services to Meet KPIs

Government-funded employment programs have targets and other Key Performance Indicators (KPIs) to evaluate how effectively clients are being served and how well the program is achieving its goals.

Examples of Common KPIs in Career Advising:

- **Client Engagement Levels:** Metrics on client participation, such as the number of sessions attended, assignments completed, and follow-up activities.
- **Time-to-Employment:** The average time it takes for clients to secure a job after completing the program, reflecting the efficiency and effectiveness of services provided.



Maximizing Client Services to Meet KPIs

- **Placement Rates:** The percentage of clients who successfully find employment or are placed in jobs within a certain timeframe after receiving services.
- **Job Retention Rates:** The percentage of clients who remain in their jobs for a set period (e.g., 90 days, 6 months), indicating the long-term success of career placements.
- **Client Satisfaction Scores:** Feedback and satisfaction ratings from clients, often gathered through surveys or follow-up calls.



Identifying KPI Targets

Case Managers or Career Advisors should know what their targets and KPIs are.

Common KPI Targets for Career Advisors/Case Managers:

- Number of services provided to clients per week
- Amount of billable services provided to clients per month (services, workshop registration etc.)
- Number of clients employed per month
- Number of clients employed for longer than 6 weeks



Strategizing To Meet Targets - Example 1



Your time-to-employment target is clients must be employed within 5 months.

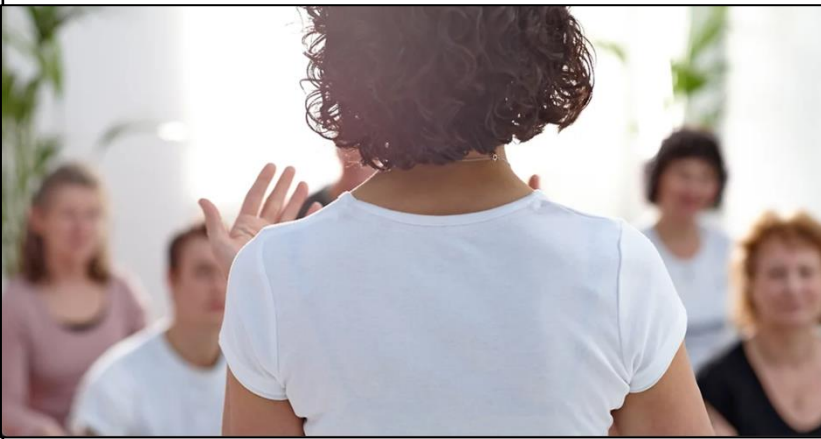
- In general, it can take approx. 1-3 months for a client to get a job. That leaves us 2 months to help the client get job ready.
- What does the client need to be job ready? It will be different for each client however in general it could be workshops (resumes, interviews, job strategies) then resume completion, mock interview and then give them time to job search on their own then possibly referral to job developer.
- All these services must be completed within the first 2 months from the intake appointment to allow your client to find a job before the 5-month placement target.
- Creating clear deadline dates for these items on their action plans could help.

Strategizing To Meet Targets - Example 2

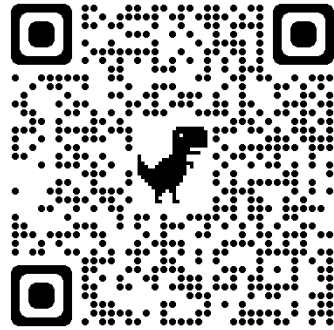


Your clients must be employed for at least 6 weeks in their new job to meet your placement target.

- Upon notification of a client getting a job, immediately send them handouts or information that will help them retain the job.
- It usually takes a bit of time in their new job for clients to discover problems or have concerns. After 2 or 3 weeks on the job, schedule a call with the client to check if they need any help or have any questions.
- If the client has problems, you have time to help them retain their job.
- Hopefully, this will help the client stay employed to meet this placement milestone.



Visit the site
at **GrowCD.ca**



grow
CAREER DEVELOPMENT

Or Connect
via email at
info@growcd.ca

