

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.

Key elements to accomplish during the first intake appointment:

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.

2. Explain the parameters of the employment program

- 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.

3. Confirm & convey understanding of what their needs are

- 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.
- 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."*

4. Establish the ground rules and how you will work together effectively

Hopefully by now the client sees the benefits of the program and wants to move forward.

It is at this point that we need to 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.

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.

Explaining to the client the best way to contact you in the office should be as detailed as possible, as this can help you during the duration of their file:

- Leave clear messages with phone numbers, understanding that not being able to speak to you, often just means you are in an appointment with other clients. Will call back within 24 hours.
- Emails are answered in sequence, if something is urgent, indicate that in the subject line.

5. Provide value to the client before ending the meeting

- In preparing for the intake appointment, Career Advisors should have spent 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 be able to provide value during the appointment, the Career Advisor can 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 information found before the appointment could still be relevant. Explain or give some of this information to the client to review before ending the appointment.