Global Corporate College®

Your Partner in Corporate Education

Future Plans Coaching

FACILITATOR GUIDE

Global Corporate College®
A World of Difference in Corporate Training
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GUIDELINES

Guidelines for Facilitator Preparation

Become familiar with the session design and objectives below. These will help you determine the best points of emphasis for your facilitation.

- Review the entire Facilitator Guide, so that you have the full context of the session.
- Review the Participant Guide. You will be referring participants to it throughout the session.
- In multiple sections throughout the speaker's notes you see directions to provide your own examples.
- Review Exercises and Activities. This course uses several active learning exercises. Reviewing them ahead of time will help you better prepare for the day.
- Prepare the flipcharts and materials listed in Appendix I.

Guidelines for Program Delivery

Assessments
There is a pre- and post- session assessment included in Appendix II.
Flow of Modules
Each module is structured in the following pattern.

1. **Challenge:** This can be in the form of a question, a thought provoking story, an example, a set of facts or statistics, a shared experience, a metaphor, etc.
2. **Discussion:** Allow the participants to respond and discuss. Draw on various discussion strategies.
3. **Focus and Narrow:** Move the group to the heart of the topic.
4. **Exemplify**: Clarify with examples, added information, an exercise or activity.
5. **Synthesize and Clarify:** Highlight responses that are the most relevant.
6. **Practice and Reinforce**: Activities and exercises allow participants to practice new skills and behaviors.
7. **Check for Understanding:** Debriefing from the exercise and facilitating discussions provide opportunities for you to check the level of understanding of participants. ***(If you do not feel that they understand the key learning points provide a different explanation before moving to the close.)***
8. **Close:** Clarify key points. It is important to have the participants articulate what they are learning.
9. **Transition:** Bridge to the next activity or content segment of the agenda. It is important that the participants understand where they have been, where they are going, and why it makes sense to go in that direction.

Facilitating the Session

Your role as facilitator is to engage the participants. Engaged learners participate and relate the learning to their own point of reference. This will enhance the learning of all attendees. We define facilitation as: The process of guiding the group members to share ideas, opinions, experiences, and expertise to discover knowledge or achieve a common goal.

Your role as a facilitator involves engaging the students with the materials and, whenever possible, taking yourself out of the mix and allowing the participants to learn from each other. Use your knowledge of group processes to formulate and deliver the structure that allows participants to discover knowledge for themselves.

Global Corporate College programs have been written to encourage participation wherever possible. As the facilitator, you can enhance the programs by:

1. Making sure the ground rules are reviewed.
2. Clarifying your expectations of participation when breaking for small group or paired discussions.
3. Encouraging contributions of all participants.
4. Maintaining the focus of participants by using appropriate attending skills.
    - Face the learners.
    - Maintain eye contact.
    - Move toward learners.
    - Avoid distractions.
5. Working to eliminate barriers to participation.
    - Rearrange the room if necessary.
    - Emphasize that what happens in training stays in training. Lack of trust can impede the learning process. Don't assume trust exists. Whether the lack of trust is with you, with the training or with the team, you must quickly determine the level of trust in the room and work to build trust.

    - Focus on the learning not the tasks. In some training sessions, there can be an over-emphasis on tasks or the result. This emphasis can isolate the group or individual who may feel that personal well-being is not a priority. The trainer must apply motivational principles that influence trainee participation levels.
6. Remembering the principles of adult learning:
    - Focus on “real world” problems.
    - Emphasize how the learning can be applied.
    - Relate the learning to learners’ goals.
    - Relate the materials to the past experiences of each learner.
    - Allow debate and the challenge of ideas.
    - Listen to and respect the opinions of learners.
    - Encourage learners to be resources to you and to each other.
    - Treat learners like adults.
7. Your role as a trainer is to observe the behavior of the participants. Infer the meaning and act accordingly. Remember the skills for observing:
    - Listen actively.
    - Scan the room.
    - Do not make assumptions.
    - Check for understanding.
    - Rephrase their responses.
    - Summarize.
    - Recap.
    - Write it down.

8. Trainees may bring up information or questions that are inappropriate to discuss/answer at that time. This is a great use of a chart called a “Parking Lot.” Just ask the person if you can place their comment on the parking lot and discuss it later.
9. Be open to feedback - Many times participants may not want to be in training and may be overly critical. Make sure you listen and respond positively to their comments.

Road Map

Module	Time	Topics
Welcome and Introductions	30 Minutes	Welcome. Agenda. Introductions. Ground Rules. Learning Objectives. Warm up Activity.
Coaching Basics	30 Minutes	Coaching Best Practices. What is Coaching? Customer centered. Coaching Cornerstones.
Power Talk	120 Minutes	Conversations. Power Talk. Powerful Questions. Challenge and Goals. Barriers.
Proactive Listening	120 Minutes	Communication. Listening. Emotional Intelligence. Supporting Behaviors. Non-verbal Cues.
Future Plans	120 Minutes	Assessments. Decision Matrix. The Plan. The Report. The Vault.
Real Play	45 Minutes	The First Coaching Session. The Second Coaching Session.
Summary	15 Minutes	

Program Overview

Description

This course will help career coaches learn the skills necessary to support and guide others. Coaches will guide customers as they complete a FuturePlans assessment, determine a career path, and develop a career plan. Building the comptentency and commitment of team members will improve performance, reduce turnover and enhance your operation. Most important, it’s inspiring people to take ownership of their own careers

Performance Outcomes

- Identify the benefits of coaching.
- Develop effective active listening and emotional intelligence skills.
- Use the FuturePlans assessment model to evaluate customer career potential and develop an appropriate action plan.

Details

Modules

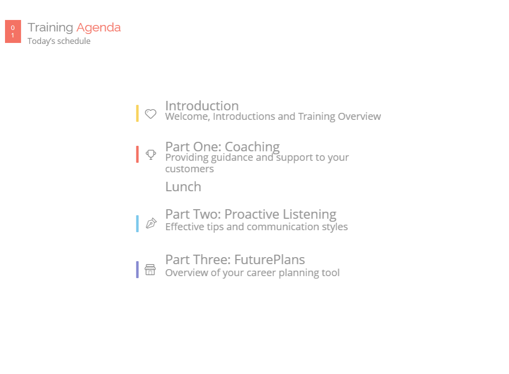
- Coaching-Basics.
- Coaching Concepts.
- Effective Communications.
- The FuturePlans assessment and planning model.

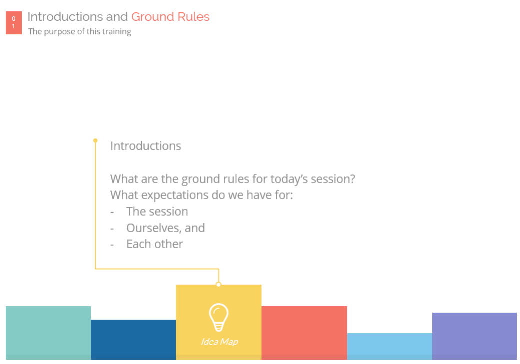
Instructional Strategies

- Brief Presentation.
- Facilitated Discussion.
- Case Studies.
- Group Exercises.
- Self-Assessment.
- Small Group Discussion.

FACILITATION NOTES AND SLIDE BY SLIDE TIMING

You will find on the following pages facilitation notes, timing and slides.

Slide Number	**Time in Minutes**	**Slides and Notes**
Welcome and Introductions		
Slide 1	10	 **[Introduce yourself]** Tell participants something about your work background that gives you credibility. It should answer the question: "Why are you qualified to teach this program?"
Slide 2	5	 **[Review Agenda]** **[Say]** To achieve our learning objectives about coaching skills, the Road Map on the screen gives a brief outline of today's session. We'll cover: – Coaching-Basics. – Coaching Concepts.

Slide Number	Time in Minutes	Slides and Notes
		– Effective Communications. - The FuturePlans assessment and planning model. **[Transition]** Now, I’m going to review the class ground rules with you.
Slide 3	5	 **[Say]** Let’s create some rules or guidelines that will help ensure we can meet our objectives today. I’m going to begin by creating our first rule: what is said in training, stays in training. We’re in a safe place, and I want you to share your experiences openly, because what you have to say will benefit all of us. **[Discussion]** Does anyone have suggestions for ground rules? [Notes] Collect input and write it on a flip chart. Rules should include the following, if these rules aren’t identified by the attendees, add them yourself: - Challenge yourself/others to learn and grow - Remain open to trying new aproaches - Share what you know

<table>
<tr><th>Slide Number</th><th>Time in Minutes</th><th>Slides and Notes</th></tr>
<tr><td></td><td></td><td>
- Start/stay/stop on time
- Have fun!

[Say]

Can everyone agree to live by these ground rules?
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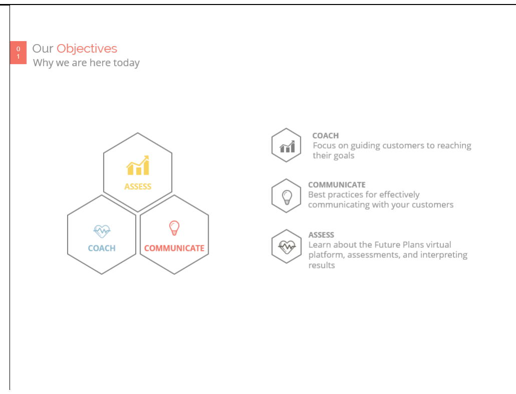
<tr><td>Slide 4</td><td>5</td><td>


[Review the session objectives]
[Say]
One of the most challenging aspects of coaching is getting the most from your customers.
This course will provide a coaching framework for you, to help customers select a path and develop an effective career plan.
You will be provided with tools to:
– Assess your emotional intelligence.
– Recognize hidden barriers.
– Manage your coaching sessions

Upon completion of this program, you will be able to:
– Identify the benefits of coaching.
– Conduct an effective initial meeting with customers.
– Deliver customer centered services.
– Communicate effectively with customers.
– Gather information by asking powerful questions.
– Set appropriate SMART goals.
– Recognize hidden barriers and provide appropriate support to help customers with these barriers.
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<tr><th>Slide Number</th><th>Time in Minutes</th><th>Slides and Notes</th></tr>
<tr><td></td><td></td><td>
– Identify and eliminate obstacles to effective listening.
– Identify characteristics of effective listening.
– Demonstrate active listening and practice listening responses.
– Behaviors to support your continued use of active listening.
– Improve communication through emotional intelligence and non-verbal cues.
– Identify the benefits and limitations of the FuturePlans assessment model.
– Recognize the assessment measures and how outcomes provide insight.

[Review]

Logistics for the day, including: breaks, restroom, phone, smoking area locations, etc.

[Say]

Are there are questions about the goals, objectives, agenda or logistics for the session?

Now, we are going to do a little exercise to start things off.
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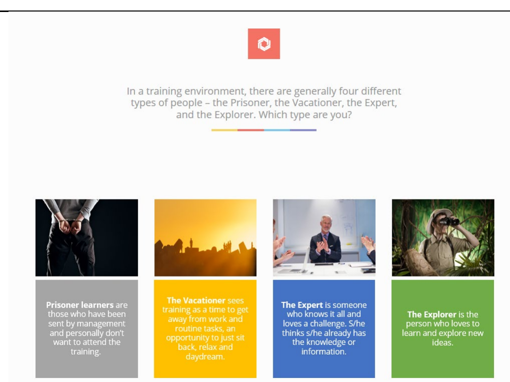

RolePlayPRO – Prisoner, Vacationer, Expert or Explorer Facilitator/Trainer Tool
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Slide Number	Time in Minutes	Slides and Notes
		In a training environment, there are generally four different types of people – the Prisoner, the Vacationer, the Expert, and the Explorer. **Prisoner** learners are those who have been sent by management and personally don't want to attend the training. They don't want to be there and don't see why they need to be there. They don't want to contribute and they will lower the energy levels in the room. **The Vacationer** sees training as a time to get away from work and routine tasks, an opportunity to just sit back, relax and daydream. S/he will get involved, but ultimately are more interested in having fun and avoiding the work left behind on their desk rather than learning anything. **The Expert** is someone who knows it all and loves a challenge. S/he thinks s/he already has the knowledge or information. S/he likes to challenge the trainer on every topic instead of taking the opportunity to listen and learn. **The Explorer** is the person who loves to learn and explore new ideas. This type of learner is attentive during the session, gets actively involved in group work, and brings high levels of energy into the room. As a trainer, understanding which category your learners fall into is crucial when you're delivering training. In the same regards, if you are an employer, being aware of this can dramatically alter the way training and development efforts are approached within your company. ***This process of consideration is not about labeling the individuals and writing them off. Instead, it is about becoming knowledgeable about your staff's diverse needs and supporting their learning process, wherever they are.*** If you have a large number of what you perceive to be prisoners, one way to begin understanding how to better adjust to their learning style is to simply ask the question;

Slide Number	Time in Minutes	Slides and Notes
		"What kind of learner are you? Prisoner, vacationer, expert or explorer?" Then explain to them what each means. By creating open communication, you will not only help yourself better understand their learning styles, but help the learners discover it themselves. This can be a great first step to working with the learners to come up with the best possible training method that will produce active explorers. There is an explorer lurching inside all of us. It is up to the employers/trainers to unearth and encourage each participant to actively engage in their own training and professional development This is a short activity to measure participants' engagement for the meeting at hand ***Running the activity*** 1. Ask each participant to report anonymously his or her attitude toward the retrospective as an Explorer, Expert, Vacationer or Prisoner. **Explorers** – Are eager to discover new ideas and insights. They want to learn everything they can about the iteration/release/project. **Expert** – Will look over all the available information, and will compare it to what they already know. **Vacationers** – Aren't interested in the work of the retrospective, but are happy to be away from the daily grind. **Prisoners** – Feel that they've been forced to attend and would rather be doing something else. 2. Collect the results and create a histogram to show the data. 3. Acknowledge the results and guide a discussion about what the results mean for the group.

Slide Number	Time in Minutes	Slides and Notes
Slide 6	15	 **[Say]** Now that we know who's in the room, let's take a few minutes to explain our purpose for being here today. **[Discussion]** What do you think the mission of our program involves? In your own words, how would you describe the service we will provide customers? (take notes on responses) Has anyone here ever worked with a professional career coach? (If yes, ask them to describe their experience, and ask if they are willing to share how much they had to pay for those services. Also, ask if the coach taught them to be self-sufficient, or did the coach do things for them, making them reliant on the coach.) Has anyone here ever been to a one-stop? (If yes, ask them how long ago they went and to describe their experience) **[Say]** For those of you who do not know, the State and Federal governments sponsor what is called the one-stop system. Most people find out about these facilities when they are referred there by either the Unemployment office or the local Department of Public Welfare office. The one stop system offers many of the same services we do, so let me take a moment to explain some of the advantages customers have when working with us over working with a one stop. First, funding for one stop offices is dependent on their ability to meet a series of performance measures. The system must place set

Slide Number	Time in Minutes	Slides and Notes
		numbers of customers into employment and other programs, and take very specific steps to meet compliance to get credit for the placement. While the people working in these systems are good people (they work there because they want to help others), the reality is that they have little time to work with customers. A significant amount of their time (for many, over half of their time) is spent entering complex case notes into the state system of record and doing paperwork to meet program requirements. They must do the administrative work and do it correctly, because they could lose funding if they fail. One stop customers often complain that while their advisor spent plenty of time filling out forms with them, they failed to provide a great deal of service or support. *(Note: To help you understand how this impacts practice, I'm sharing experience. In Philadelphia, we had four one-stop offices. At my location alone, our customer flow was around 6,000 visitors per month, but we had only four case managers at that location. At times, our case managers had active caseloads of more than 250 people, far more than they could ever hope to help. Many people never received individualized services largely because they didn't qualify under WIA and so would not "count" as a placement. We couldn't afford to allocate resources to individuals that wouldn't help us meet performance measures. As training director, a large part of my job was to provide support to individuals who didn't qualify for intensive services.)* Another negative impact of the overwhelming amount of red tape and heavy caseloads is that advisors tend to be directive. They have little time with customers, so to make the most of what they have, advisors tell the customer what to do rather than asking questions and encouraging customers to take ownership of their choices and reflect on their options. This often led to a mismatch between customers and the job they would get, and quite often casting aside an individuals' preferences to get them to work in just about any job. Finally, recent changes in legislation have led to many of the one-stop systems merging services between two main programs, WIOA (think of this as a program for people between jobs) and TANF (welfare to work programs). Because federal funding for TANF

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<tr><th>Slide Number</th><th>Time in Minutes</th><th>Slides and Notes</th></tr>
<tr><td></td><td></td><td>programs is much greater, and because the number of TANF customers is much larger than WIOA (adult and dislocated workers), the bulk of the one-stop resources are allocated to TANF.

One stop offices tend to be overcrowded, loud, and while they do their best to provide a comfortable environment, the reality is that most of the customers there are what we would call “prisoners”; they were told they must be there or they will lose their benefits. Many unemployed people (especially college graduates and professionals) refuse to use these services because of the environment and the stigma of being in what looks and feels like a welfare office.

[Focus and Narrow]
Now, let’s compare that with our program. (Refer to notes on flipchart; address any misconceptions about the program briefly)

Our program exists to make the customer (not the case notes) the number one priority, so while we may provide many of the same services, our approach is very different. Our responsibility is to support our customers as they make their own career decisions, and provide them with the support they need to be successful whether they choose to return to work, go to school, or enlist in the military. We are here to promote the ability to make informed decisions, set short and long-term goals, and help customers think and reflect on their choices.</td></tr>
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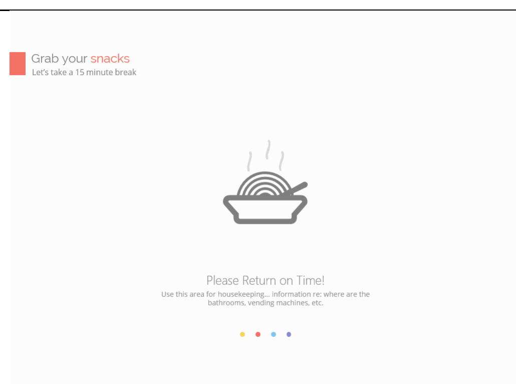

15 minute break</td></tr>
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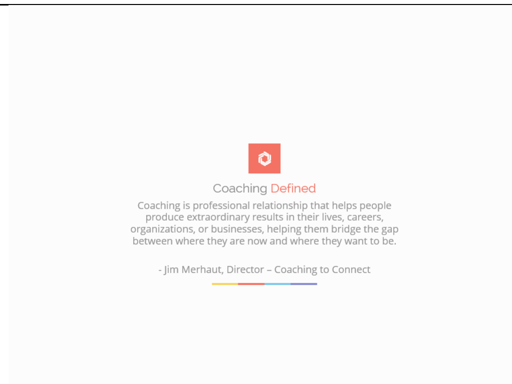
Slide Number	Time in Minutes	Slides and Notes
Slide 8	10	 **[Challenge]** Think about your own career for a moment. How valuable would it be to you to have someone around to help you realize your professional aspirations? A coach who's committed to your growth in both your life and career. Great, right? Now think about your customers. Do you think they want the same thing? Of course, they do! Engaging your customer's sense of purpose and cultivating their self-efficacy will help move them to success. In this module, we're going to talk about coaching practice and development tools to use in your daily conversations. These tools help take the heavy lifting from you, and place responsibility squarely with your customers. Coaching is not doing, and it's not telling people what they should do. It's guiding, questioning, prompting, and encouraging people to move forward. Most important, it's inspiring people to take ownership of their own careers. It's about being more collaborative, and less directive. You'll be giving people more autonomy and doing less handholding. Your customers are responsible for driving their careers, but we all need collaborators, people who help us think creatively, see things in perspective, and guide us to finding solutions to challenges. Let's talk about what it is to be a coach.

Slide Number	**Time in Minutes**	**Slides and Notes**
Slide 9	5	 **[Read the slide content to the group]** **[Challenge]** In the role of a coach, how do you think you should view the people who need your help? **[Discussion]**

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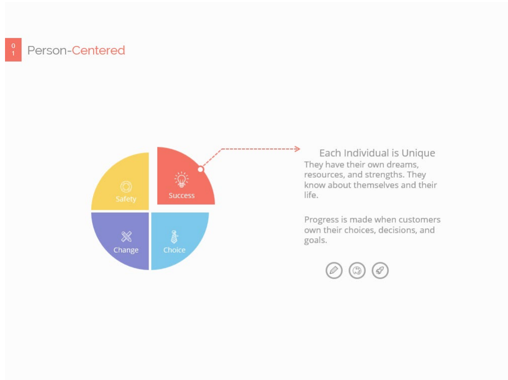

[Focus and Narrow]
Coaching requires a perspective or mindset that views individuals positively and full of strength. Treating people as individuals with names, stories, children, strengths and specific needs and barriers; in other words, remember the “golden rule”.

The difference between coaching and case management is that with coaching, change is owned and directed by the customer; goals are mutually set and agreed upon. As a coach, you should always encourage progress, even if it is slow and takes place over time. You should also maintain patience in the presence of slow progress or setbacks; remember, there is a difference between being empathetic and being emotional.

As a coach, you must seek to develop a belief that a person can take charge of their life outcomes. To support this belief, promote individual choice and individual decision making. Finally, seek to understand a person’s inner motivations.
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<tr><td>Slide 11</td><td>10</td><td>


[Say]
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Let's talk about career planning. What does career planning mean to you?

[Discussion]

[Say]

Career planning is the <u>continuous process</u> of:

thinking about your interests, values, skills and preferences;
exploring the life, work and learning options available to you;
ensuring that the work fits with personal circumstances;
<u>continuously</u> fine-tuning the work and learning plans to help manage life changes and changes in the world of work; and
revisiting this process throughout your career.

Adapted from http://www.careercentre.dtwd.wa.gov.au

This model shows how you, as the coach, support the process to help customers reach their goal. Remember: your job when working with the customer is to guide and support them on their chosen path.

[Focus and Narrow]

Let's start with assess. How do you assess your customer?

- FuturePlans which will help customer identify their strengths and weaknesses, as well as choose a path and create a plan.
- Customer interview - speak with customer to try to better understand their thoughts and needs.
- Identifying any challenges and barriers a customer may face that is making it difficult to realize their goals.

"Address" is the next step; here we guide the customer through the process of addressing challenges, we also help them confirm their plan and fine tune the goals they have set. In your experience, how do you find out about customer barriers and challenges?

"Guide" along with providing information on resources, we further guide our customers in their decision-making process. It's during this time that we support the customer as they embark on their plan; depending on what the customer wants to do, we may guide

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<tr><td></td><td></td><td>them by evaluating their resume or provide information about applying to colleges.

“Support” rather than directing and telling customers what to do, our job is to support their decisions.

This visual model works, because it’s not always a straight line from one point to the next, rather we may need to work with the customer on more than one thing at a time. So, for example, while you’re helping a customer prepare for their goal, a new barrier may come up to address. Also, while assessment is the first step, each time you meet with your customer and get new information, your adding new thoughts to your initial assessment.</td></tr>
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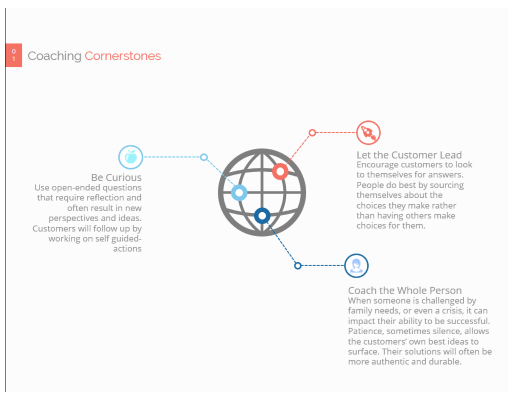

[Review slide content]

As a coach, much of what you will focus on is empowering your customer.

[Discussion]
How does empowering benefit your customer?
How does empowering your customer benefit you?

- Empowering customer will make it possible for them to make decisions independently, rather than being relia5nt and requiring direction from their coach.</td></tr>
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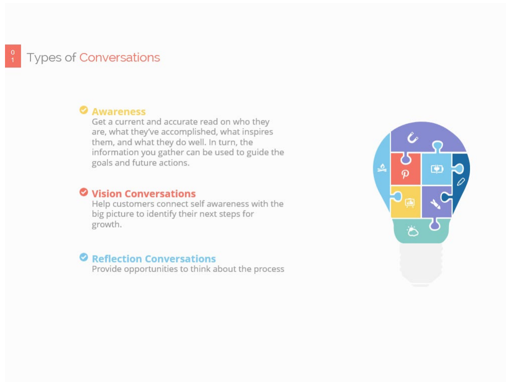
<tr><td>Slide 13</td><td>5</td><td>

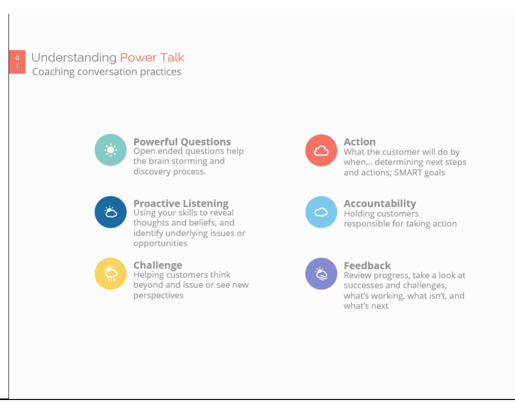
[Say]

As you’re working through the coaching model, you will engage in three main types of conversations. Let’s talk about the key types of conversations you will have as a coach when working with your customers.

[Focus and Narrow]
Awareness conversations support discovery and well as self-awareness.

Vision conversations are exploratory and encourage customers to come up with appropriate next steps on their own.

Reflection conversations provide opportunities to learn, assess, acknowledge, appreciate, and even celebrate customer accomplishments.

[Transition]
Let’s focus our attention on power talk; the way you’ll talk with your customers</td></tr>
<tr><td>Slide 14</td><td>5</td><td>
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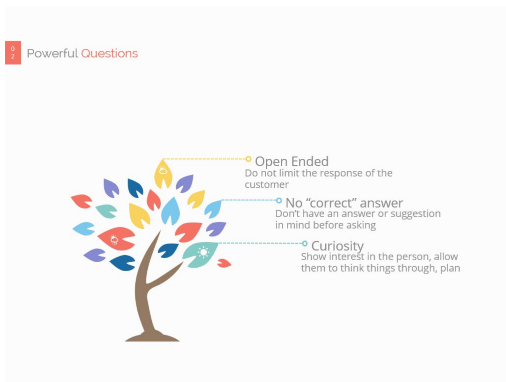
		[Say] These are the types of power talk; you'll find a copy of this slide in your packet. Let's talk about best practices for using each of these aspects of power talk.
Slide 15	20	 *Note to facilitator: asking powerful questions requires the coach to listen carefully to their customer and think; this process requires real effort. We spend a good amount of time on this practice because we need our learners to recognize the value of this approach. If the premise isn't accepted, the coach will find it is much quicker and easier to simply provide direction and instructions. Telling the customer what to do will make many customers dependent on the coach; some of these customers can get to the point where they rely on the coach to make many decisions for them.* *Recognize that many people struggle emotionally when they lose their job because what we do is such an important part of who we are. Job loss can leave people feeling powerless, and they will often second guess themselves. They may feel inadequate and incapable.* *If coaches become the "holders of knowledge" and primary source for solutions, the coach will find that providing answers may create a short-term gain, but in the long run they will have to constantly hold the customers' hand which will cost them much more time and effort than the process of empowering the customer. It will also take ownership of decisions and plans away from the customer, making them less likely to "own" the result.* **[Say]**

		Powerful questions are a great tool in your counseling arsenal. Asking powerful questions will allow you to get information and insight from customers, often learning details and other information that you wouldn't learn otherwise. Powerful questions are open-ended and do not limit the response of the customer; they increase the customers' self-awareness by making them think about the question and form a full response in their minds. Powerful questions aren't asked when you already have a "correct" answer in mind. You can use powerful questions rather than giving advice, or offer criticism. Turn those statements into open ended questions to try to understand the customer and sometimes guide them to conclusions. While you may have thoughts in mind, demonstrate curiosity to better understand the individual's thought process. Listen closely, as powerful questions encourage thoughtfulness and often draw out more information. Customer responses may also change your view; you may find that your initial thoughts don't fit the situation and needs of the customer. **[Synthesize and Clarify]** Powerful questions usually begin with words such as "Why?", "How?", or "What?" These types of questions are designed to trigger customers to source their own ideas and solutions; your job as the listener is to allow the customer time to respond demonstrating active listening skills. **[Practice and Reinforce]** Let's try to turn some closed ended questions into open ended questions… How can we turn these questions around to create a powerful question? Let's start with: - Do you like ___________? (vs. What do you think about ___________?) - Are you enjoying __________ (vs. How do you feel about _____________?) **[Role Play]** Let's look at a sample conversation, first using typical "counselor questions", then using powerful questions. In this scenario, the customer is overwhelmed by the number of jobs they find online and afraid they may be missing great opportunities.

(Note: ask for volunteers to play the role of the coach and customer)

Conversation 1
Coach: How is the job search going?

Customer: Not so good.

Coach: Everyone has those weeks; I wouldn’t worry about it. Where did you apply this week?

Customer: The school district and the community college.

Coach: Good. Do you have any questions?

Customer: I get bogged down trying to decide which jobs I should target, can you help me search better?

Coach: That happens to a lot of people. Why don’t you do this; create a short list of target employers. Start your job search each day by checking their websites.

[Discussion]
What did you notice about this conversation?

1. A lot of closed questions
2. The customer doesn’t mention challenges until asked if they have any questions
3. Coach provides directives; while the solution is practical, the customers’ challenge is solved or figured out by the coach.
4. [Ask] If the coach is the source of all answers and information, what do you think the customer will do when they face their next challenge? (*They will be more likely to turn to the coach for answers.*)

[Role Play]
Conversation 2
Coach: So, how’s it going with your job search?

Customer: Not so great.

Coach: What challenges are you having?

		Customer: While I'm setting aside time to search, there still doesn't seem to be enough time. I get bogged down trying to decide which jobs I should target. Coach: Sounds like you're seeing the huge number of opportunities out there, and even with focused attention you're getting overwhelmed. Is that accurate? Customer: Yes, I get anxious. I'm nervous that I'm going to miss something, or that I'm going to rush to put together information and make mistakes on my application, making hiring managers think I'm not paying attention to detail. Coach: What is your expectation about what you should be able to do? Customer: I should be able to create a system or process to prioritize the things I'm looking for to limit my job search. I should also have my information typed out to make it easier to put together on the fly. Coach: Those are great ideas, let's talk about them. What would your process look like? **[Discussion]** What did you notice about this conversation? How was it different from the first? - Coach took customers lead - When the customer provided a short response to the first question (how's the job search going), the coach mined for information; this strategy can be used at any time to "dig deeper". - Acknowledged the customers' perspectives and feelings, and worked with them, didn't minimalize them or work against them - Rather than trying to fix things, the coach guides the customer to identifying their own solution. If the customer's solution isn't adequate, the coach can guide the customer through questioning toward a better solution. - Coach may have advice and criticisms to offer, but the customers' insight is much more empowering; they've can find their solution and can take ownership of it.

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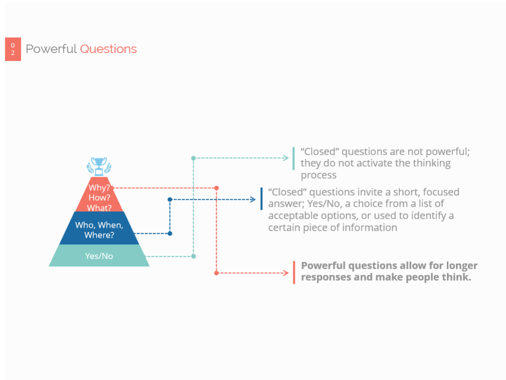
<td>

[Focus and Narrow]
Powerful questions invite people to think, provide insight, and can help customers discover solutions to problems without relying on you to provide answers.</td>
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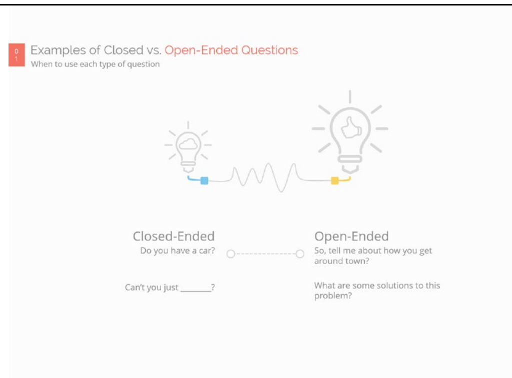
<td>

[Practice and Reinforce] Break into groups of 1 "customer", 1 "coach" and 1 or more observers. Present a coaching scenario, then have coach work through using powerful questions. Observers take notes and provide feedback on questions.

[Synthesize and Clarify]
Have observers report out</td>
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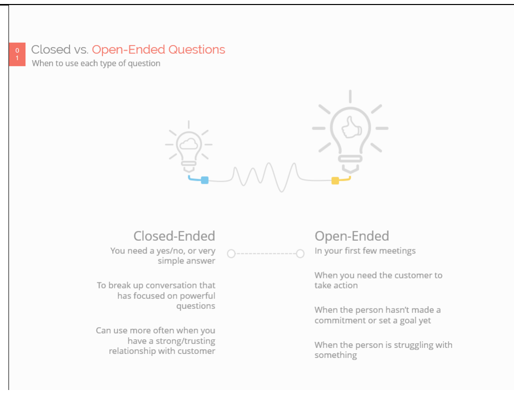

[Close]

Remember, powerful questions are used to mine for information from your customer. Using these questions will encourage the customer to think and often find solutions to the problems. From there, your responsibility as a coach is to support them in their decision.

One more note about open and closed ended questions. While we have been focusing on open-ended/"powerful" questions, the reality is there are times when you want to use a closed ended question. This works especially well when you've been asking a lot of open-ended questions; it will help to break up the conversation. Closed ended questions are also useful when you need a simple answer, or have a strong relationship with a customer. When you have a strong relationship, customers will be more willing to provide information without your having to "mine" for it.
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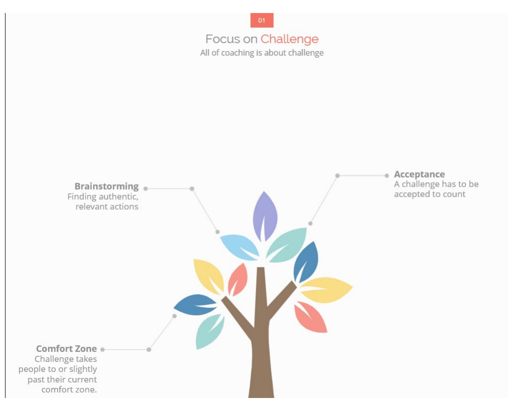

[Transition]
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		The third power talk practice is Challenge. **[Challenge]** Coaching is about challenge. You'll find that when working with customers, you will help them set goals and take the appropriate actions to reach those goals. You don't just want to skate along the surface and take action on the first idea that comes up and just stop there. Good coaching fosters deep self-awareness and ownership of big ideas. For the customer to realize success, they must do some work. Working with your customer to set appropriate goals will be key to their success. Let's talk about three key components of challenge. *Comfort zone* – when setting goals, you must consider the person you're coaching. An appropriate challenge for one person may be a nightmare for another person. When setting appropriate goals, we want to find a sweet spot; it's ok to ask a customer to stretch a little into unchartered territory, but if the customer is too uncomfortable with the challenge, chances are they won't complete the task. If the "big idea" requires them to grow into a new comfort zone, you may need to help them identify a series of smaller challenges that will help them move their comfort zone where it needs to be. (baby steps) *Brainstorming* – challenges require thought, not only in identifying the appropriate challenges, but also in finding the appropriate actions to take. These ideas need to come from the customer to both empower them and so that they will take ownership of the challenge. Finally, we come to *acceptance*. The customer must accept the challenge to be held accountable for it. Without acceptance, there is no commitment. **[Transition]** To resolve challenges, we need to help our customers set goals. I recommend using SMART goals to support your customers' ability to succeed. Let's look at SMART goals.

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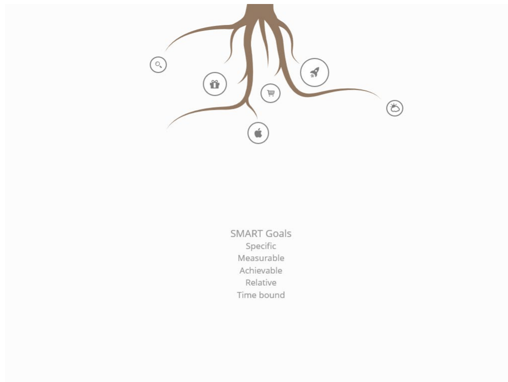

SMART stands for specific, measurable, achievable, relative, and time bound.

Let’s consider an example; what if you have a customer who doesn’t have computer skills. This person needed assistance just to turn on the computer and get to the FuturePlans website. Let’s create an appropriate SMART goal pertaining to developing computer skills.

On flipchart (note agreed upon/appropriate responses for each):
(S)
(M)
(A)
(R)
(T)

[Discussion]
Specific – okay, so we want this person to learn how to use a computer. Should I just write that? (Walk the room through a discussion; “learn how to use a computer” is not specific enough.

Why do you think it’s important to be specific?

[Exemplify]
In this case, we need to specify by adding “basic computer operations”, or a list of things the individual needs to learn, such as turn the computer on, access the internet, navigate to a website, etc.

[Discussion]
<u>*Measurable*</u> – What does making a goal measurable mean to you? Why do you think it’s important that goals be measurable?
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		- Measurable means having an outcome or end point in mind - This is an important aspect of a goal, because without it how will a person know when they have achieved the goal? **[Challenge]** What are some examples of ways we could make this “basic computer operations” goal measurable? *(examples: prepare a checklist of things the customer will learn, point customer toward a program that provides a certificate of completion or a specific course plan, etc.)* <u>*Achievable*</u> – this means that the goal must be appropriate for the individual. We can’t expect that this customer will be able to program in JavaScript by our next meeting, right? As mentioned on the last slide, the goal must be appropriate. You may need to help your customer find resources available to help them achieve their goal. In the example we’re using, what resources do you know of that can help someone learn basic computer skills? Note: *FYI… gcflearnfree.org, created by the Goodwill is an example of a free on-line resource that offers training and certificates in a number of technology areas.* **[Synthesize and Clarify]** When you have identified the resource, provide the customer with step-by-step instructions on what they need to do. Understand that your meetings will cover a lot of information; it’s easiest for the customer if you are able to provide written instructions for them to refer to once they’ve left the meeting. **[Challenge]** <u>*Relative*</u> – the goal must have meaning to the person, there must be a motivation. The customer must understand the purpose of the goal to have a sense of its’ value. **[Discussion]** In this example, what makes learning computer skills relative for our job seeker? Why should they want to learn? **[Synthesize and Clarify]**

		Computers are part of our everyday life; we use them for entertainment, communication, learning, and much more. In this case, the customer will want to use the computer to search for and apply to jobs, they may need to use the computer to receive their unemployment, etc. **[Challenge]** *Time bound* – This means setting a due date for a goal. **[Discussion]** Why do you think it's important to hold the individual accountable to completing a goal in a specific amount of time? **[Exemplify]** If I were on a diet and said I'm going to lose 5 pounds without setting a timeframe, I'm more likely to cheat on my diet because I have no sense of urgency. With no due date, I could always decide to start my diet next week. If on the other hand, I say I'm going to lose 5 pounds in the next four weeks, I'm much more likely to stick to my diet so that I can achieve the goal in the amount of time I chose. **[Say]** Finally, if the goal is large, requires a lot of work or many steps, you will find that your customer will be more likely to succeed if you break the goal down into smaller pieces to make it more manageable. **[Transition]** Sometimes when you're working with customers on goals, you may find that they have challenges that make it difficult to get to where they need to be. We call these challenges "barriers". Let's turn our focus there for a few minutes.
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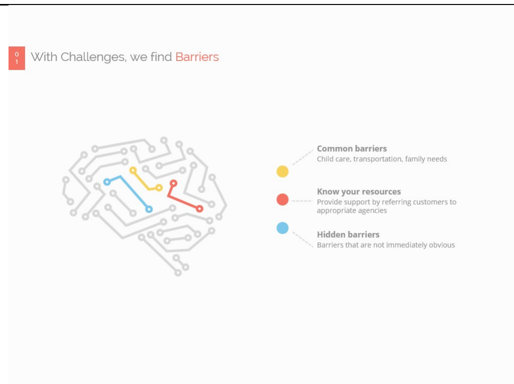

[Challenge]
Customers will often have barriers that will prevent them from being able to move forward toward their goal. Some common barriers may involve childcare or family needs, transportation, a lack of computer skills, the need to write an up-to-date resume.

[Discussion]
As a coach, what types of barriers do you see most often?

[Synthesize and Clarify]
It’s important that you, as a coach, are aware of the resources available in your community so that when a customer has a barrier like those we’ve discussed so you can provide referrals to service providers that can help.

[Transition]
You will find that sometimes customers have barriers that aren’t obvious; as a matter of fact, they may not recognize the barrier themselves. These issues are often behavioral based and pertain to the way their mind receives, interprets, and responds to the external world. This are not a form of mental illness, but can still have a dramatic effect on the individual. I’m going to refer to these as hidden barriers. Let’s look at an example.
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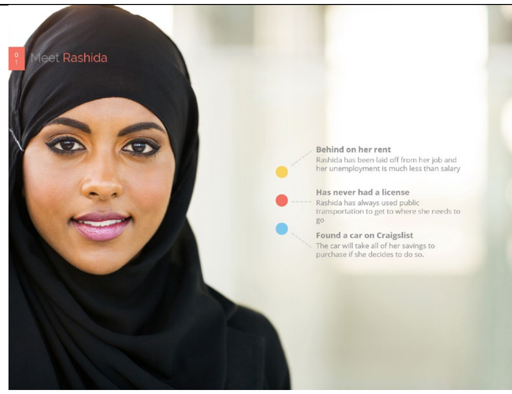

[Challenge]

Meet Rashida. Rashida has lost her job and is struggling to get by because her unemployment check is a lot less than her salary was while she was working. She's behind on her rent and the landlord keeps having to chase her each month to get his money.

Rashida wanted to comb through Craigslist to look for work, but once she got on the site she didn't feel like looking for a job. She felt bored, so she started to click around. She ended up in the automotive section where she found a cute car for sale. Although Rashida wasn't shopping for a car (she has always used public transportation), and she doesn't have a license, she decides she wants to use her savings to buy the car. Her justification is that she could expand her job search if she could drive.

[Discuss]
Any thoughts on Rashida's situation? Logically speaking, is this the best time to invest in a car? What advice would you give her?

[Say]
Rashida is determined to buy the car and asks a relative to put the car under their name because while she can pay for the car itself, to register the car under her name she needs to get a license, insurance, etc. The relative refuses to do this because they don't want to be held liable if anything goes wrong; they also know she's been struggling and think the rent should be her priority.

Once denied, Rashida immediately starts yelling at her relative. She can't understand why they are unwilling to do this one simple thing for her. Then she asks if she can at least borrow a license plate, the relative again refuses her request.

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[Discuss]
Now what do we think about Rashida’s situation? What advice would you give her?

[Say]
Rashida’s determination wins out. Although it’s illegal, she buys the car and uses it to get around... until she gets pulled over. The car is impounded and Rashida is hit with some serious fines.

When explaining her situation, Rashida is sure to point out that none of this is her fault. If her relatives had put the car under their name like she asked, she wouldn’t be in this horrible position.

[Discuss]
How many of us have met someone like Rashida?

Why do you think she went ahead and bought the car?
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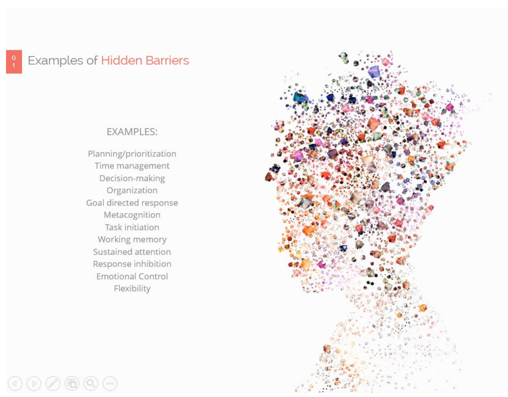

[Challenge]

Rashida’s behavior indicates several possible hidden barriers.

[Hand out the hidden barriers activity sheets. Discussion questions below]

[Exemplify]
Now that you can see what some common barriers are, let’s consider some of the barriers Rashida may have. What do you think?

As learners respond, ask them for an example from the story.
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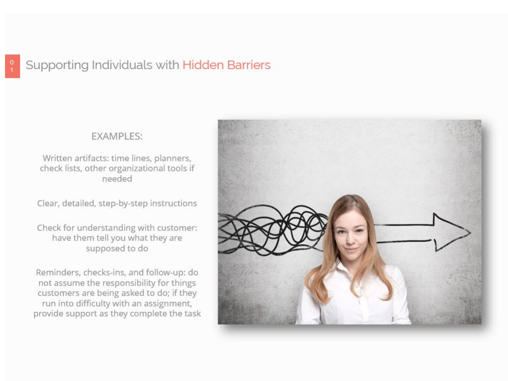
		Notes: Prioritization, goal directed response, task initiation, response inhibition, emotional control, flexibility **[Transition]** While it's unlikely that anyone here is qualified to diagnose Rashida with anything, we can now better understand what may be going on with some of the customers we are working with. Let's consider what it would be like to have a hidden barrier. **[Practice and Reinforce]** Hidden barriers activity Part 1: Attendees will read each of the descriptions for the hidden barriers. Think about the type of challenges they might face and how their job performance might be impacted if they had these barriers. Write down their thoughts. Part 2: Brainstorm with a partner and discuss the type of behaviors they might observe or things their Career Seeker might say that may indicate that they have one or more of these hidden barriers. Write down some powerful questions they could ask customers that would help them identify these barriers, or note some behaviors they have seen in the past that may indicate that an individual has this type of barrier. Report out. Part 3: Relate/briefly discuss the role that powerful questions play in identifying possible barriers.
Slide 24	10	 **[Close]**

		Let's touch on a few more points about hidden barriers before we move on. First, individuals with hidden barriers struggle with these challenges persistently. So, if you misplace your keys one day that doesn't mean you have a hidden barrier. If you misplace your keys (your kids, your credit cards) five times a week, you are clearly challenged by organization. Also, if an individual is homeless and keeps their paperwork in a bag or purse and struggles to find something, it may be because they don't have the resources to be organized. In this case, try supplying some envelopes or folders to help the individual out. **[Discussion]** Let's go through some other examples of things you can do to support individuals with hidden barriers. [review slide content] Finally, I want to point out that hidden barriers can be overcome; sometimes people struggle because these skills are learned behaviors. If they aren't taught appropriate behaviors, the customer may have simply not learned them. There are many ways in which you can support your customers, although you may occasionally work with individuals that have barriers beyond what you can hope to manage or support. Never point out that an individual has an issue; instead, guide them to a conclusion through questioning and be sure to also guide them to useful supports and solutions while you're at it. ASK ROOM TO COMPLETE "RATE YOUR PRACTICE" QUESTIONS 5-7 AND MODULE 1 "TAKE ACTION" PAGES

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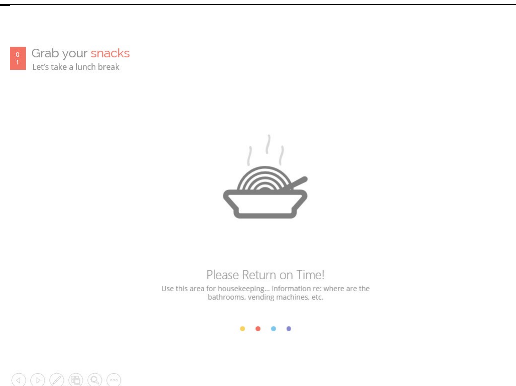
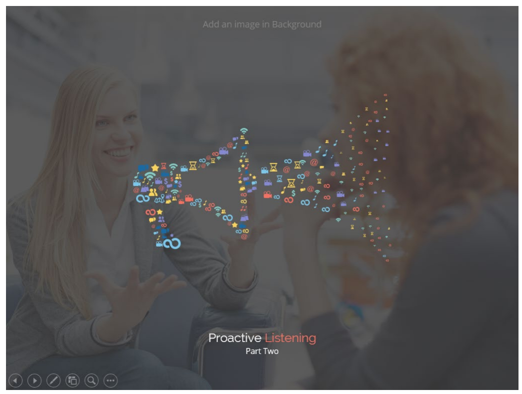
<tr><td>Slide 25</td><td>60</td><td>

Lunch Break</td></tr>
<tr><td>Slide 26</td><td>5</td><td>

[Welcome the participants back]
[Explain that this will be a very practical review of some tools and techniques to help them best become skilled at active listening]</td></tr>
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[Review agenda for this part of the training explaining that the session will integrate lecture, group discussion, role plays, and individual work]</td></tr>
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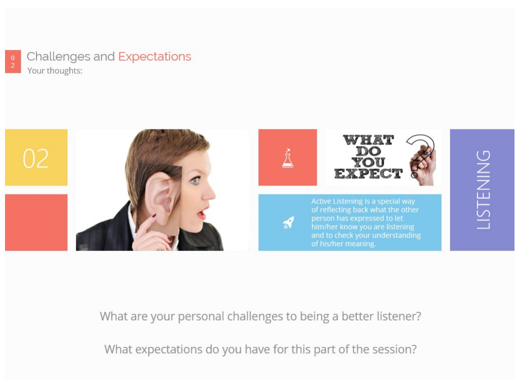
[Review the learning objectives]
- Identify and eliminate obstacles to effective listening.
- Identify characteristics of effective listening.
- Demonstrate active listening and practice listening responses.
- Learn behaviors to support your continued use of active listening.</td></tr>
<tr><td>Slide 29</td><td>15</td><td>

[Discussion]
– Why listen?

[Use the following list as conversation starters if needed]
- Less paperwork
- Upward communication
- More cooperation from others
- Improved productivity
- Better negotiation / selling skills

[Facilitate group discussion by asking]
– What is the value of listening to you?
– Why aren’t we better listeners?</td></tr>
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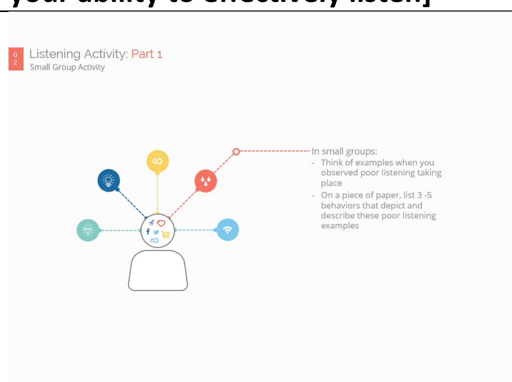
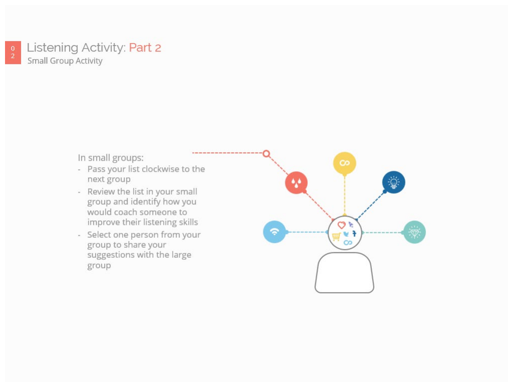
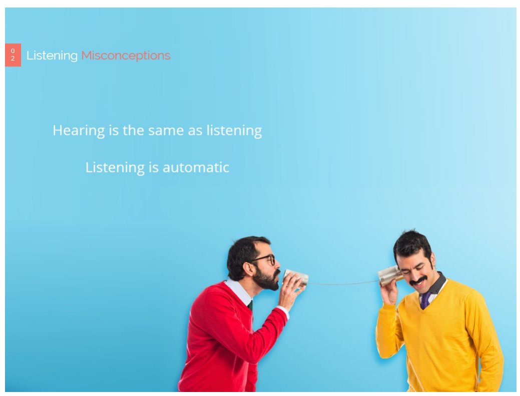
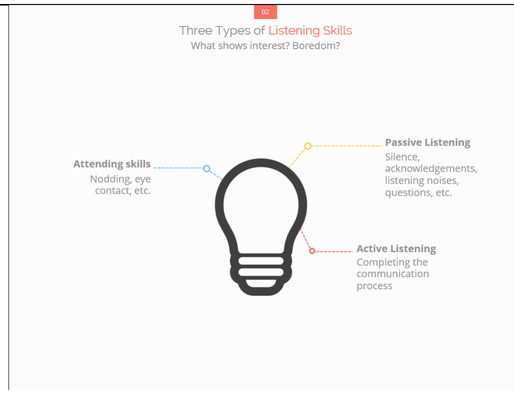
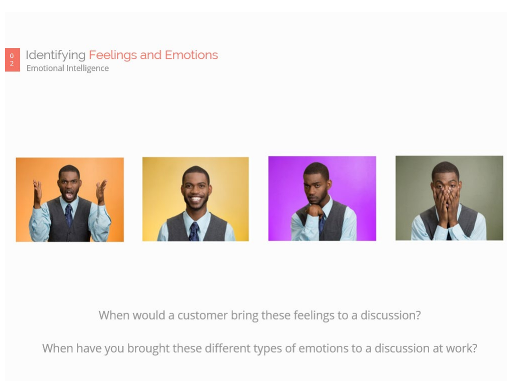
		[Use the following list as conversation starters if needed] - We never learned to listen. - We often complete the speaker's sentences. (either aloud and or in our thoughts) - Listening requires focused concentration. - Our filters distort what we hear. - We often listen with the intent to respond versus the intent to be understood. **[Ask participants if anyone ever received formal training on listening. If so, have them describe it. Most often it was a seminar or short class, but not an entire focus in school as we had with reading, math, etc.]** **[Ask if anyone here ever completes other people's sentences]** **[Follow up with respondents by asking them to specific why and when they do that?]** **[Say]** We often do not concentrate only on listening, but rather allow ourselves to become distracted with the many things happening around us. **[Ask participants to list examples of when it happens to them]** **[Note answers on flip chart]** **[Synthesize comments and note any trends]** **[Say]** Everyone has personal filters or beliefs that color the way we see and hear things. **Activity** **[Say]** Let's try something. I want everyone to quietly look around the room and identify everything you see that is blue. Look up, down, and all around. **[After a few seconds, ask everyone to stop and close their eyes]** **[Ask them to now tell you everything they saw that was ORANGE]** **[Allow a few responses]**

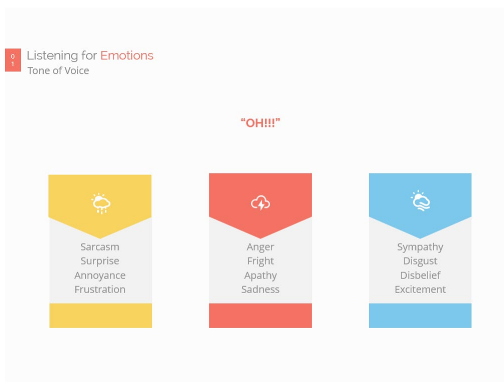
		[Say] That is an example of a filter. **[Share your observations with the class on what you noticed them doing during the activity (especially when you asked them to close their eyes and identify everything orange)]** **[Say]** Another filter example is the "Agree / disagree filter" that we use when we hear things. **[Facilitate group discussion by asking]** – How does the agree/disagree filter affect how we listen? – What other filters do we have? **[Use the following list as conversation starters if needed]** - Mode of communication. - Person speaking. - Position. **[Say]** We often listen to build up an argument to support our beliefs versus listening freely with the intention of understanding the point(s) being made by the speaker. **[Give a personal example of how your own filters have influenced your ability to effectively listen]**
Slide 30	10	 **[Activity]** 1. Divide room into small groups 2. Review instructions a. Think of examples when you observed poor listening taking place. b. On a piece of paper, list 3 – 5 behaviors that depict and describe these poor listening examples

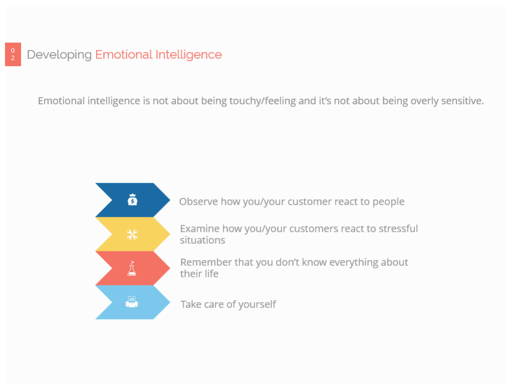
		3. Share a personal example to give them a thought starter. Example, trying to talk on the phone while also working on the computer. The goal is to have each small group brainstorm up to 5 behaviors that they have seen that depict poor listening 4. Allow 5-7 minutes 5. Ask one or two groups to share one example 6. Transition by asking participants to consider whether they listen differently (more / less effectively) with different audiences, e.g., at home, when shopping, at work (boss, peer, etc.)
Slide 31	10	 **[Activity]** 1. Review instructions a. Pass your list clockwise to the next group b. Review the list in your small group and identify how you would coach someone to improve their listening skills c. Select one person from your group to share your suggestions with the large group 2. Ensure that each group gets a list passed to them. 3. Allow 5 minutes 4. Observe the groups, adding input when appropriate. Observe both the content of their discussions, but also the process they are using. Are they listening to one another? Be prepared to share your observations with the large group, if appropriate, especially if you noticed a common behavior throughout the class. 5. Ask each group to share their lists and the coaching suggestions they came up with.

Slide 32	5	 **[Facilitate group discussion by asking]** – When do you notice yourself exhibiting poor listening skills? – When do you notice yourself exhibiting good listening skills?
Slide 33	3	 **[Say]** Hearing someone is different from listening to them. Because our ears hear someone, we often believe that we begin to clearly listen at the same time. (Provide a personal example.) We often believe that listening must be learned over time, informally, as we progress through our daily lives. The good news, though, is that we can accelerate our effectiveness as a listener by learning some simple listening skills and by anticipating and avoiding the challenges to listening that we encounter every day.

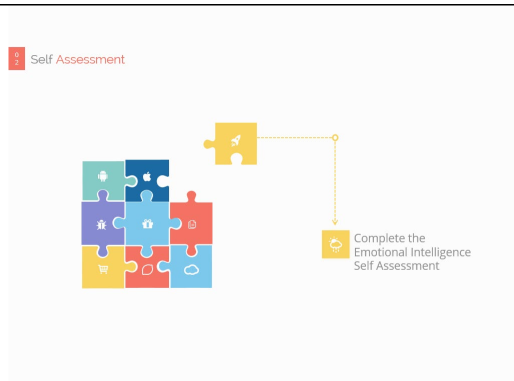
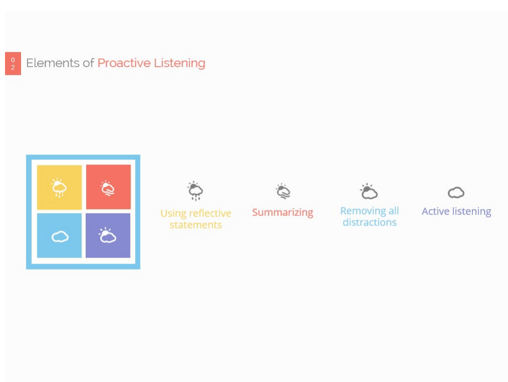
Slide 34	5	 **[Facilitate group discussion by asking]** – What shows interest? Boredom? **[Say]** Let's look at the 3 types of listening skills, each of which can help you become a better and proactive listener. When done together, your skill at listening can create a very new experience for you and the speaker. Attending skills are observable listening skills. **[Facilitate group discussion by asking]** – If you walk by a window and observe 2 people communicating well, what are they doing that tells you they are effectively listening? **[Answers may include]** Non verbals: nodding, posture, eye contact. **[Say]** Passive Listening: Examples include: Silence (ask how silence could be a listening skill. Do you really "do" silence?); listening noises (ask if they can share some listening noises with you); open-ended questions (ask for example and differentiate from closed-ended (can only be answered with a yes / no), invitations to "tell me more" are powerful questions Active Listening: Completing the communication process with feedback. All messages have a fact and feeling associated with them. Effective listening recognizes and reflects both back to the speaker. For example, "I can see how getting the forms delivered 2 days (fact) late would be very frustrating (feeling)" , "It sounds like you are quite concerned (feeling) about getting here so late (fact). We are going to focus on active listening because it is a skill that most people have not acquired. And, it is the most powerful of the listening skills because it proves to the other person that we have heard and understood their message.

Slide 35	5	 **[Say]** Most messages contain two types of information: the facts (the person's thoughts, ideas, knowledge, or data) and the feelings (emotions, attitudes, sentiments, and values). The careful listener must tune into both of these elements to achieve true understanding. Active listening is a technique that trains us to look at the facts and the feelings. The good listener must tune in both of these elements to achieve a clear understanding of the message as it was intended to be heard. Recognizing the facts within a message is usually much simpler than hearing the emotional context accurately. For example, we may think someone is upset when they are actually frustrated. Being able to differentiate and acknowledge both the facts and feelings will substantially increase your effectiveness to listen. Let's talk a bit more about the feelings (emotions) we may hear when listening to someone.
Slide 36	5	 **[Say]** Emotional intelligence is the ability to recognize, understand, express and manage one's own emotions

		AND The ability to manage relationships through the recognition and understanding of the emotions of others. (citation: http://www.diffen.com/difference) *The goal is to get participants thinking about listening in a work context. The list outlines the 4 major categories of emotions (mad, glad, sad, and afraid) and some of the types of feelings within each category.* **[Review emotions]** **[Facilitate group discussion by asking]** – How /why customers may bring emotions from each category with them. – When would a coworker bring these feelings to a discussion? – When have you brought these different types of emotions to a discussion at work?
Slide 37	10	 *The purpose of this activity is to practice listening for the feeling component in a message.* **[Ask participants to share words that show sarcasm, anger and sympathy]** Examples include Sarcasm • Really? • You’ve got to be kidding me. Anger • Curse words • Are you crazy...that will never work. Sympathy • I’m sorry to hear that

		Activity 1. Direct participants to pair up. 2. Instruct them to each pick an emotion and convey it to their partner using only the word OH 3. Allow 3 minutes. 4. Debrief by asking pairs how well they conveyed their emotion. **[Say]** If you believe you hear one emotion and express that in the active listening, that provides the other person an opportunity to correct you. At that point, you would then be able to thank them for clarifying and you will then be on the same page with one another and you can react accordingly.
Slide 38	5	 Emotional intelligence is a learned behavior that can be improved in time. Remember, being emotionally intelligent means that you can understand how others are feeling. To help develop your own emotional intelligence, you can: Observe how you/your customer react to people. Do you/they make rush judgments before knowing all the facts? Do you/they stereotype? Put yourself in their shoes; consider their point of view and be more open to their perspectives. Examine how you/your customers react to stressful situations. Do you/they become frustrated when there's a delay or something doesn't happen as expected? Consider how you/they react and create simulated sessions where emotions can be felt and managed in a controlled setting. Remember that you don't know everything about your customers' life, but that there are reasons why they think, behave, and respond as they do. This will help you respect their points of view.

		Finally, take care of yourself to minimize your stress and avoid overreacting, which will assist in managing and controlling your emotions.
Slide 39	7	 *As you move through these, feel free to ask group to identify times in which they have used these* **[Challenge]** Let's walk through some emotional intelligences. *Self-awareness* - The ability to recognize what you are feeling, to understand your habitual emotional responses to events and to recognize how your emotions affect your behavior and performance. When you are self-aware, you see yourself as others see you, and have a good sense of your own abilities and current limitations. *Managing emotions* - The ability to stay focused and think clearly even when experiencing powerful emotions. Being able to manage your own emotional state is essential for taking responsibility for your actions, and can save you from hasty decisions that you later regret. *Motivating oneself* - The ability to use your deepest emotions to move and guide you towards your goals. This ability enables you to take the initiative and to persevere in the face of obstacles and setbacks.

		Empathy - The ability to sense, understand and respond to what other people are feeling. Self-awareness is essential to having empathy with others. If you are not aware of your own emotions, you will not be able to read the emotions of others. *Social Skill* - The ability to manage, influence and inspire emotions in others. Being able to handle emotions in relationships and being able to influence and inspire others are essential foundation skills for successful teamwork and leadership. **[Transition]** Now we're going to take a few minutes and evaluate our own emotional intelligence. (pass out worksheets)
Slide 40	5	 Provide instructions on worksheet
Slide 41	2	 (Note: this is a transition slide that outlines the content on the next few slides) **[Say]** It is important to identify various supporting behaviors that we can use to help us be as skilled as possible with active listening. The

<table>
<tr>
<td></td>
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<td>next few slides outline some specific steps we can follow to help make active listening a skill that we will begin to use on a regular basis. By integrating these ideas with the active listening formula, you can significantly increase your skills as an effective listener. Let’s take a look at each of these in more detail. (switch to the next slide)</td>
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<td>Slide 42</td>
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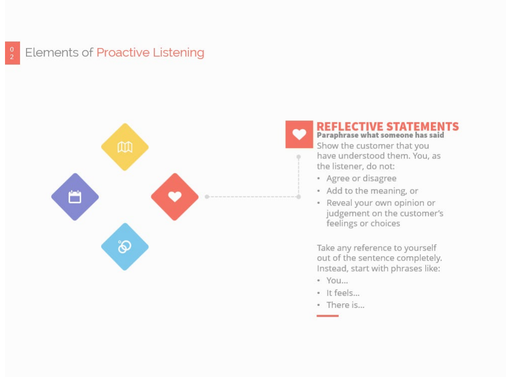

Review the information above, then provide examples by making a statement, then rephrase the statement removing reference to yourself.

[Challenge]
Reflective Statements paraphrase what someone has said. They show the speaker that you, as the coach, have understood them. You, as a listener, do not:

- Agree or disagree with the customer
- Add to the meaning, or
- Review your own opinion or judgement on the customer’s feelings or choices

Take any reference to yourself out of the sentence completely. Instead, start with phrases like: you…, it feels…, there is…
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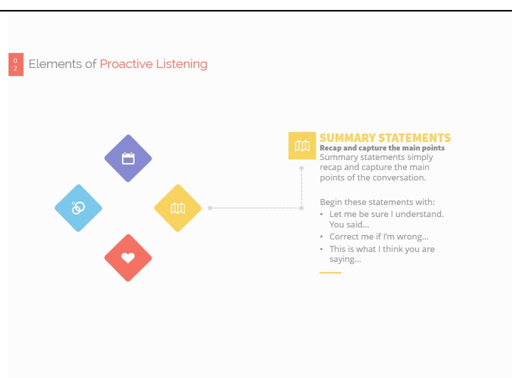

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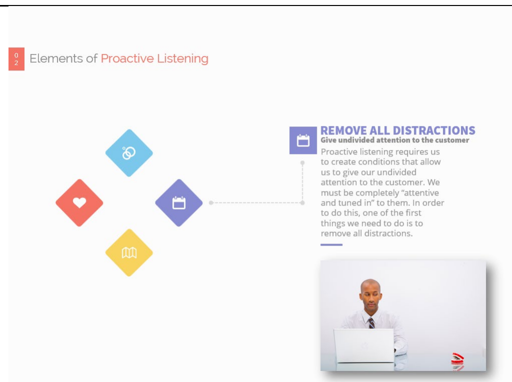
<table>
<tr><td></td><td></td><td>Review the information above, then provide an example

[Challenge]

Summary statement simply recap and capture the main points of the conversation. Start with phrases such as “I think you’re saying…”, “What I heard you say is…” “Let me be sure I understand. You said…”</td></tr>
<tr><td>Slide 44</td><td>5</td><td>

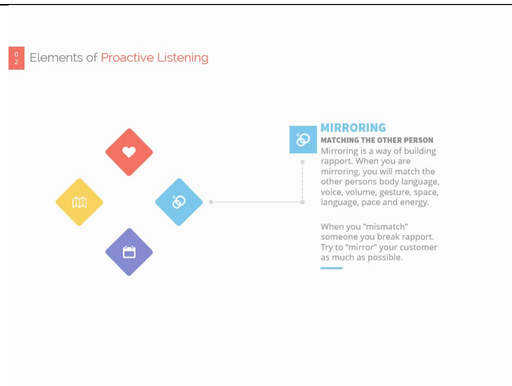
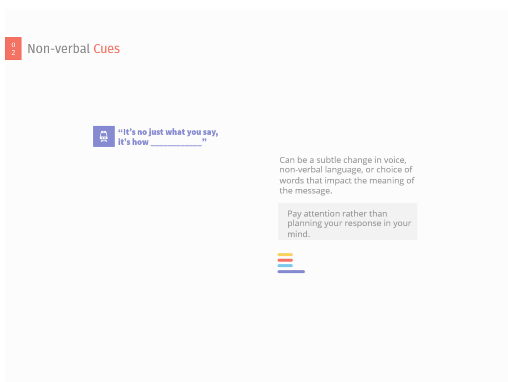
[Challenge]
[NOTE: have customers provide a short list of things they have at their desk that may distract them when talking with a customer. Items may include things like:
- Clock/watch
- Cell phone/Phone
- Paperwork (including the FuturePlans report)
- Computer
- Coffee
- Calendar
- Looking around
- Touching at your face
- Picking at something
- Tapping

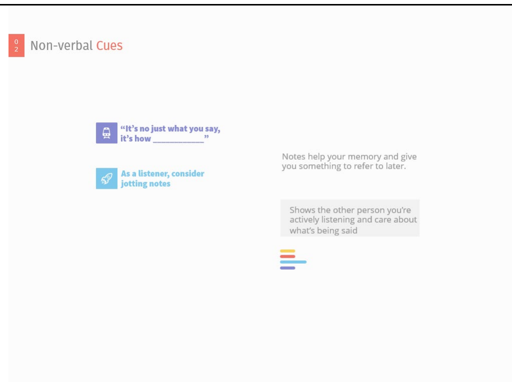
ask them to review a few of these distractions; how would they feel if they were the customer and the coach they were working with were distracted by these things:]

Examples:

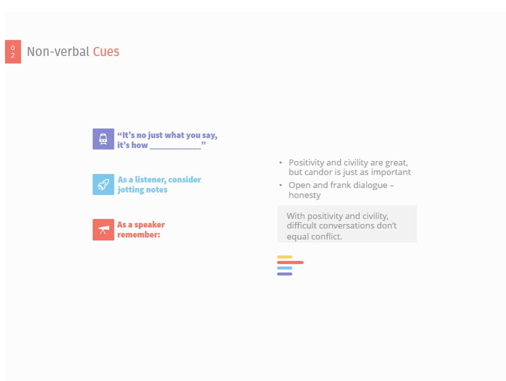
Clock: While you should be mindful of keeping appointment times, don’t allow yourself to get distracted or to seem like you’re busy</td></tr>
</table>

		watching the clock and not listening. As the customer, you'd probably get the sense that the coach is rushing you, or focusing on the next thing they need to do. **Calendar:** While everyone should be mindful of the time and respectful in keeping appointment, times running as scheduled, a calendar can leave the impression that again, the person is thinking about their next meeting, lunch, or some other event rather than being focused on you. **Paperwork:** Multi-tasking divides attention making mental breakthrough impossible; it would certainly be distracting to you if while you were talking to someone, they appeared to be reading. Instead, when you work with customers, put everything aside and be attentive only to the speaker. It may be especially tempting to review the customers FuturePlans report, but even though it's focused on the customer sitting in front of you, you need to pay attention to what they are saying. **Office Phone:** When someone answers the phone while you're trying to talk with them, it leave the impression that someone else is more important… it's definitely NOT good customer service! Even other work or other customer calls can be a distractor. As much as possible, forward your calls to voice mail, or, if you are expecting an urgent work related call, let the customer you are meeting with knowledge about the urgency and if the call comes, make it brief so you can remain focused. **Cell Phone:** Obviously, the rules for office phones applies equally to cell phones! Being in constant contact is easy these days with social media, texting, and cell phones. When you're in a meeting with a customer, it is a best practice to either turn it off completely, or silence it and turn off vibrate, put your cell phone aside, maybe even in a drawer, so you aren't distracted by messages or alerts that may pop up.

Slide 45	2	 **[Say]** Mirroring means you match the other person's body language, voice volume, gesture, space, language, pace and energy. This indicates that you understand and share the feelings of that person.
Slide 46	3	 **[Say]** Finish the phrase "it's not just what you say, it's how (you say it)" Small things in the way you speak can have a big impact on your message. As we discussed before with our exercise, your tone of voice, body language, and more can change the meaning of what you say. One mistake that people often make is that while someone is speaking to them, they are forming their response in their mind rather than focusing on what the person is saying. When someone is talking you need to focus on what they say rather than thinking about what you will say next; your thoughts are likely to change your body language. It's okay to slow down a conversation; demonstrate that you're listening closely, and never hesitate to

<table>
<tr><td></td><td></td><td>pause for a moment before you respond to put your thoughts together so your entire focus can be on the customer when they speak to you.</td></tr>
<tr><td>Slide 47</td><td>2</td><td>

[Say]

Taking notes isn’t a distraction, instead it’s an indication to the speaker that what they are saying is important to you. It’s good manners to ask permission to take notes, explain that you like to have notes to refer to later so you can make sure you have all of the details/information correct.</td></tr>
<tr><td>Slide 48</td><td>5</td><td>

[Say]

Finally, while you want to always have a positive outlook and speak politely, you also need to be honest. Even when you have to be the bearer of bad news, if you do it with the customers thoughts and</td></tr>
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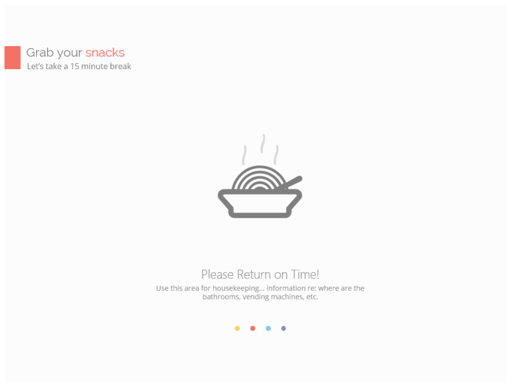
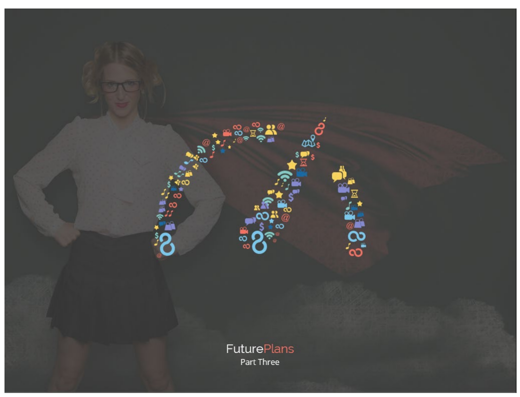
		feelings in mind you will find that difficult conversations don't have to equal conflict. ASK ROOM TO COMPLETE "RATE YOUR PRACTICE" QUESTIONS 5-7 AND MODULE 2 "TAKE ACTION" PAGES
Slide 49	15	 15 Minute Break
Slide 50	10	 Welcome everyone back We're going to finish the day today by talking about the FuturePlans assessment. **Ask:** what are your feelings about the assessment? **Ask:** do you have any concerns about the assessment? **Ask:** do you think the assessment provides accurate information? **Ask:** has anyone taken an assessment like what FuturePlans offers when searching for a job? *Talk about experiences, thoughts. Synthesize*

Slide 51	3	 *Customer flowchart – what is FuturePlans and how will we use it? Review the tool and discuss how it will inform coaching.* **[Challenge]** Here is our customer flow. Our customers will begin by taking the FuturePlans assessment, then choosing their favorite careers and the direction they would like to take (find a job, go to college or training, or enlist in the military). From there, the customer will have the ability to review and revise their results and plans at any time by signing back into the system. While we will review the information provided by FuturePlans, remember that our support is what will make this program, and our customers, successful. Now that we've set the stage, let's review the components of FuturePlans.

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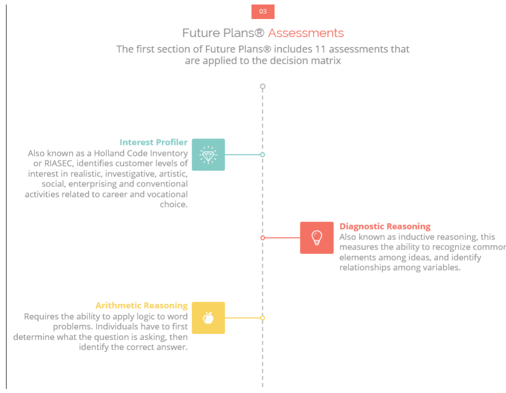

Cover the content of the slide for each assessment; the notes below add to the slide content by providing insight on how this information is applied/how it is useful.

[Challenge]
The interest profiler collects information from users about the type of things they like to do using a rating, or Likert scale. The goal of this assessment is to give insight into a person's interests, so that they may have less difficulty in deciding on an appropriate career choice for themselves. It's a variation of the Holland Codes assessment which is recognized as being one of the top career exploration assessments available.

Diagnostic Reasoning - People with strong diagnostic reasoning do well with interdisciplinary subjects or projects, where they can synthesize and combine information to find the most probable conclusion or solution to a problem.

Arithmetic Reasoning – Math logic; this is an important skill for many science and technology fields.
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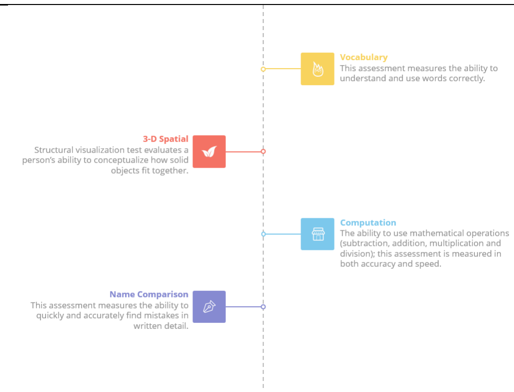

Vocabulary - People with strong vocabulary skills are ready to take on positions where the nuance of language is important, such as politics, writing, education, law, sales, management, etc.
3D – Spatial abilities are important for jobs where an individual is responsible for taking things apart and putting them back together (fields like natural sciences, carpentry, construction, engineering, and architecture)
Computation - This skill is important in positions that require quick, on-the-spot calculations are needed, like book keeping, and construction.
Name Comparison - This skill is very important in many jobs and fields, such as administration, library services, or anywhere where people have to be both accurate and quick working with paperwork.
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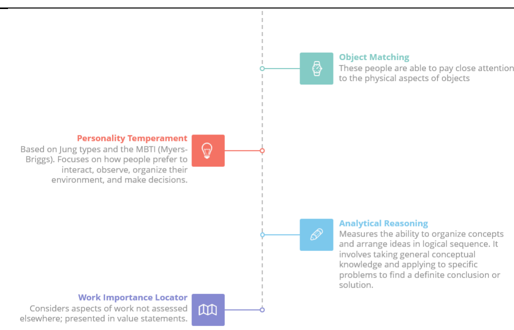

Object Matching – people with this skill set may do well as jewelers, graphic artists/web designers, electrical technicians, radiologists and more all require the ability to quickly see details in pictures or objects.
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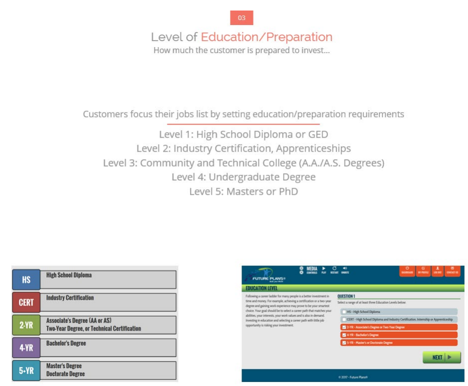
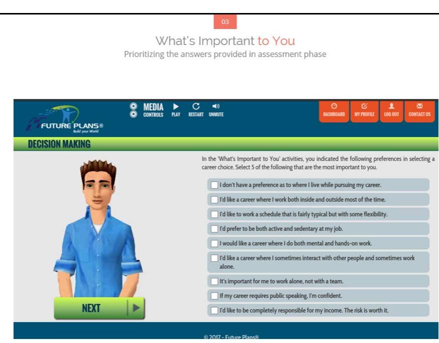
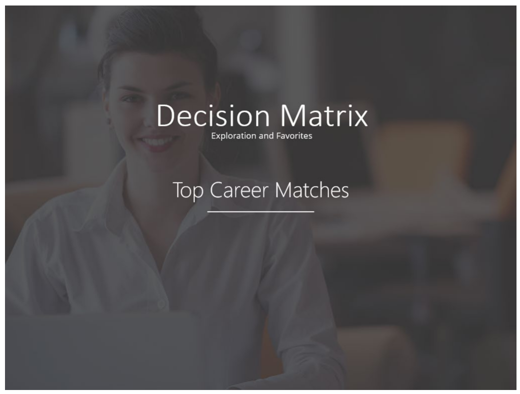
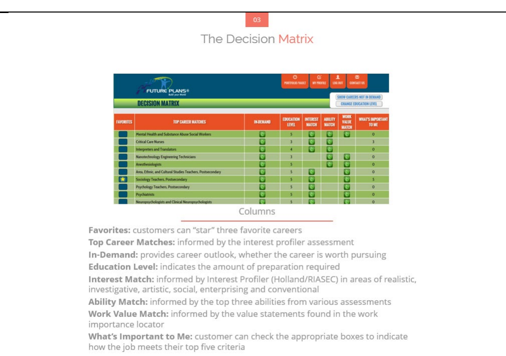
		Personality Temperament – this assessment is based on the Myers-Briggs or MBTI; it's one of the most well known personality assessments available. *Analytical Reasoning* - Engineers, data analysts, accountants should be high in this type of reasoning. *Work Importance Locator* – allows customers to determine their most important priorities in the workplace.
Slide 55	1	 **[Say]** We're almost ready to see the decision matrix, but first the customer can choose three levels of education or preparation typically needed for careers. There are five categories or levels (listed above). I encourage customers to choose the education level they are currently at first, then select levels above where they are so they can see what can be possible if they invest a little bit more in preparation.
Slide 56	1	

		The last area where the users chooses things that are important to them in regard to work environment. This information will appear on the decision matrix, where the environmental factors will be checked against the user preferences.
Slide 57	5	 **[Challenge]** Once the customer has finished the assessment piece, they will be taken to the decision matrix; a list of jobs that match their skills and interests. **[Discuss]** Before we dive in, let's talk about our own results. **[Ask]** How do you believe the decision matrix compared to your own interests? Were there any surprises? Did your current occupation appear on the matrix?
Slide 58	5	 *Review Matrix content column by column*

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[Say]
Favorites: customers can “star” three favorite careers
Top Career Matches: informed by the interest profiler assessment
In-Demand: provides career outlook, whether the career is worth pursuing
Education Level: indicates the amount of preparation required
Interest Match: informed by Interest Profiler (Holland/RIASEC) in areas of realistic, investigative, artistic, social, enterprising and conventional
Ability Match: informed by the top three abilities from various assessments
Work Value Match: informed by the value statements found in the work importance locator
What’s Important to Me: customer can check the appropriate boxes to indicate how the job meets their top five criteria

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[Say]
From the decision matrix, user can click on a job title to get more information about a specific job title/field. On the right is the list of criteria the customer identified as most important; they should check off any that apply.

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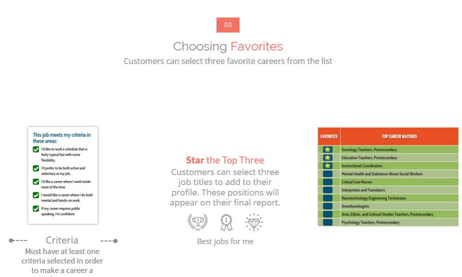

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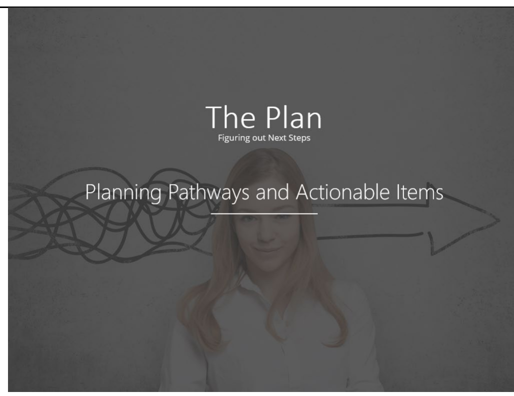
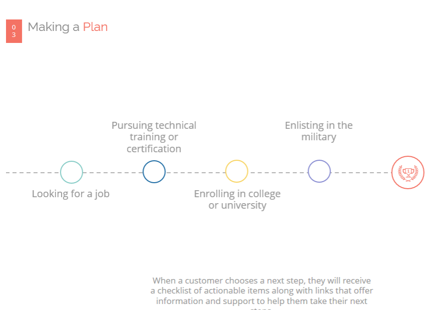
<tr><td></td><td></td><td>[Say]
From there, customers should choose three career favorites. To create a favorite, the customer will first need to go into the career profile and select one or more of the checkboxes found under “This job meets my criteria in these areas:”

They should read over the description including the outlook (demand) area. If they like what they see, they should click the blue box on the left of the decision matrix to select a career as a favorite. When a career has been identified as a favorite, a yellow star will appear in the box.

Note: The customer can only choose three; if they want to change their choices, they must first deselect one of their favorites to make room for the new favorite.</td></tr>
<tr><td>Slide 61</td><td>1</td><td>

[Say]
Once the customer has chosen three favorite careers, their next step will be to make a plan. Future Plans allows customers to choose their next step, then provides information and support to assist the customer along the way.</td></tr>
<tr><td>Slide 62</td><td>2</td><td>
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<table>
<tr><td></td><td></td><td>[Say]
The four plan options are listed, and a sample plan for each option is in your packet. Once selected, the customer is provided with a checklist of action items that also includes links to online resources that provide information and support. The plans include the elementary steps that a person should take to prepare for the path they have chosen. This tool is useful to you as a counselor, and provides a checklist for your customer, but you will find that the list of things to do is not all-inclusive. Many of the practical steps that your customers will need to take to manage barriers, such as identify childcare or transportation resources are not listed here.</td></tr>
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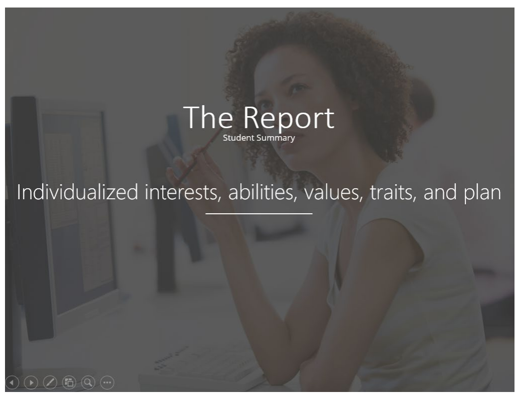

[Say]
Finally, we come to the report. The report section is what you, as a coach, will use to guide you through your conversation with the customer during your second meeting as it provides you with a concrete artifact that relates to your customers’ experience and thoughts.</td></tr>
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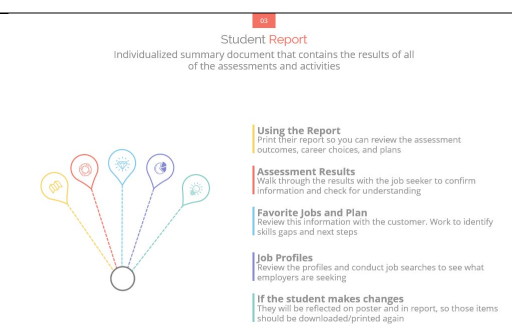

Use the report to review assessment outcomes, career choices, and plans. The report includes:</td></tr>
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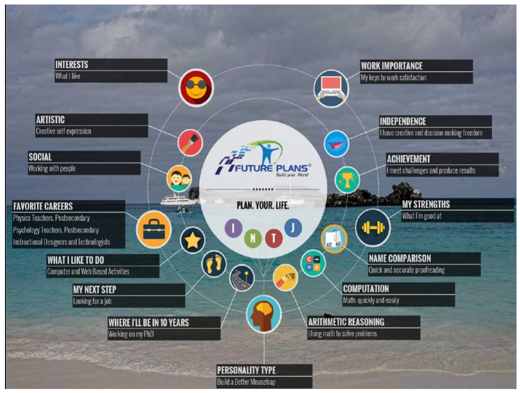
<table>
<tr><td></td><td></td><td>A poster
Assessment results
Favorite jobs and plan
Three favorite job profiles</td></tr>
<tr><td>Slide 65</td><td>3</td><td>


This poster is a graphic representation of the assessment outcomes. Let’s look at the content moving clockwise from the top. The main themes (Work Importance, My Strengths, Personality Type, Favorite Careers, and Interests) are listed on the outermost circle. Each theme has associated results. For example, on this certificate under the work importance theme we see that the two keys to satisfaction are independence and achievement. The strengths listed are name comparison, computation, and arithmetic reasoning. The Myers-Briggs/Jung Profiler type is INTJ; highlighted in the center circle.

The customer long-term goal is provided; and this person plans to be working on their PhD in 10 years. We can see what the customer’s chosen next step is, as well as what they like to do (this individual said they like to work with computers) as well as their favorite careers, and their interests which are artistic and social.
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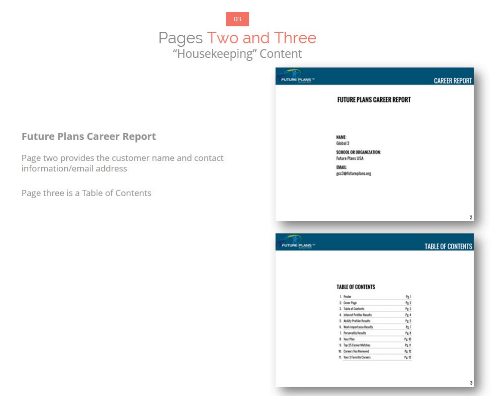
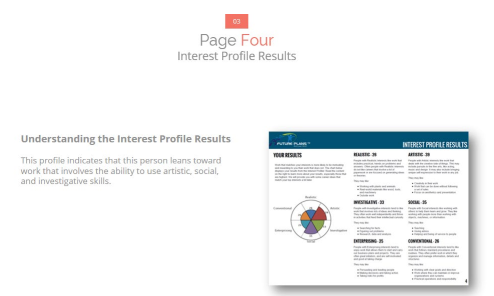
<tr><td>Slide 66</td><td>1</td><td>

The next two pages are basically “housekeeping”. The cover page provides customer name and contact information (email addy), age three provides a table of contents</td></tr>
<tr><td>Slide 67</td><td>10</td><td>

Interest profile (Holland Code) review areas

Understanding scores:
- The pie chart on the left is a graphic representation of the student scores (and it provides the numeric score)
- Descriptions of the interest categories are on the right
- Each interest has a maximum score of 40
- Look for strengths; this profile indicates that this person leans toward work that involves the ability to use their artistic, social, and investigative skills. The other scores aren’t actually low, but are considered secondary interests.
[Ask]
Why do you think it’s important to measure these interests?</td></tr>
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Note and synthesize responses. Talking points if needed: We spend 40+ hours per week at work; if you don’t like what you’re doing for 40 hours a week, it’s hard to be happy in life! You’re more likely to succeed when you enjoy what you do; you’ll be more engaged, motivated, and willing to go the extra mile.
Activity Ideas

Create a labelled pie chart on a flip chart and have attendees identify their top two scores, then write their name and score on post-it notes and place them in the appropriate pie piece (only two post-its each)
Summarize the room outcomes to identify the top interests in the room

[Discuss]

Do you think your outcomes were accurate? How do you use your strongest skills in your current job? Imagine you had a different set of interests, how would you perform your job? Would you be happy at work? (Note: it is possible to still be happy in most cases, but your happiness would come from a different set of tasks)

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Review types of reasoning
Shows the results of the skills and ability assessments the job seeker has taken

On the left we see the assessments with a graphic representation of their score
On the right, we have a description of what was assessed and what the individual’s score means when applied to career choice; this information is continued page 6. It’s important to note that only the highest three scores impact the outcome of the decision-making matrix (this has been

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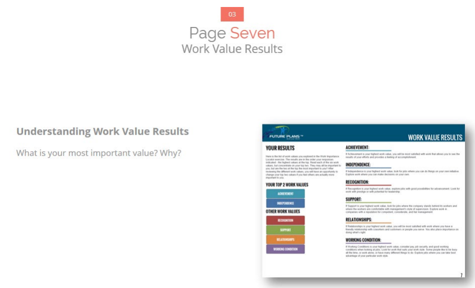
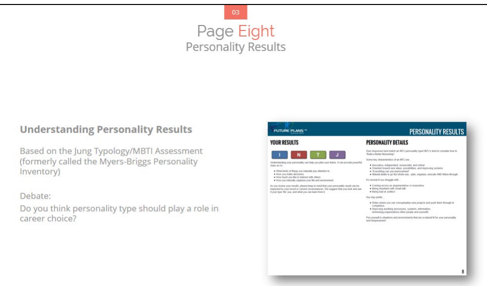
		confirmed by FuturePlans support). In this case, the user scored “high” in all areas, but not all jobs listed in the decision matrix indicated a match in abilities. One concern is that when you select a job that doesn’t have a match in abilities, the system confirms that you really want to choose that job title; this could be a deterrent for users. - A low score in one area may indicate that the individual may score highly in an opposite skill; it’s important though that we try to find jobs that match high scoring abilities. The scoring ranges are very broad, so even a mid-range score may represent a significant challenge to a job seeker. **[Ask]** What resources are you aware of that will help an individual score higher in the abilities area? *(YouTube, Khan Academy, etc.)* *Notes: Scores can be in high (scoring 66-100%), mid-range (scoring 34-65%), and low areas (0-33%). The ranges applied are very broad, the mid-range would be considered by many to be a failing score, so it’s important that favorite jobs match “high” abilities.* *You will find that when working with adults, they can underperform for several reasons with this type of assessment. Some may struggle with using a computer, so they are distracted. Many of these scores can be improved through practice and learning; if someone hasn’t done a particular type of math since high school, they may be rusty and need a quick refresher to get a better score.* *Another crucial point is that although an individual may have abilities in certain areas, these may not be things they enjoy doing. For example, this person scored highest in the Name Comparison activity, but cringes at the thought of having to be the editor, or perform other activities associated with name matching for a living.*

Slide 69	10	 **[Challenge]** While I think everyone would agree that all of the work values listed are important (and we could probably add to this list!), this assessment asks the job seeker to identify their top two. In this example, our job seeker has identified achievement and independence as their top two, that doesn't mean they would be happy going into a workplace where management was happy to just "throw someone under a bus". On the left we see the two values identified by the customer as well as a list of the other values available to choose from. On the right we have short descriptions of each value. The job seeker can adjust/change their top two values by going back into the assessment area from their dashboard. **[Activity]** Poll the room again; have attendees write their top value on a post-it and put it on a flipchart/organizer. Go through each value and ask the people who selected that value as their #1 to identify why that value is most important to them. **[Ask]** How do they "live" that value?

Slide 70	10	 *Personality results – based on Jung (pronounced young or yung) typology/MBTI assessment* *This is an area where customers are likely to be interested, and it's easy to dig deeper. Humanmetrics.org offers not just the outcome, but also percentage scores to accompany the type which is also important because the scale is broad. The outcome of this assessment does not seemingly impact the job list results.* **[Challenge]** Let's discuss the personality results section. Carl Jung believed an individual's personality was made up of his or her preferences, or the way he or she chooses to do certain things. He theorized that there were four pairs of opposite preferences that indicate how an individual: energizes (**E**xtroversion v. **I**ntroversion), perceives information (**S**ensing v. I**N**tuition), makes decisions (**T**hinking v. **F**eeling) and lives his life (**J**udging v. **P**erceiving). Four preferences—one from each pair—make up someone's personality type. This is indicated by the four letters that refer to each preference, and there are 16 different personality types in all. **[Discuss]** Do you believe that personality type should play a role in career choice? *CON* *There is a large body of research that suggests that the claims made about the MBTI cannot be supported. In other words, although the MBTI appears to measure something, many psychologists are not convinced that any significant conclusions can be based on the test.*

Many people have examined the relation between type and occupation by examining the proportions of type within each profession. For example, one might observe that many elementary teachers are ESTJs and conclude that ESTJs prefer to be elementary school teachers or to work in a related occupation. Although it sounds appealing, such a conclusion runs into many fundamental problems. First is the normative data to judge the relation between type and profession. For example, the proportion of ESTJs in the teaching profession is the same as the proportion of ESTJs in the general population, or 12 percent. This similarity suggests that there is nothing special about the type of person who becomes an elementary school teacher.

Another problem stems from jobs that are dominated by men or women. Nursing is a good example. If we compare the distribution of type for nurses against managers, there appears to be a different pattern of type. We could conclude that certain types are more likely to enter nursing while other types are more likely to become managers. The research, however, indicates that the personality types again are equivalent to that within a random sample of the population when the distributions are broken down by sex.

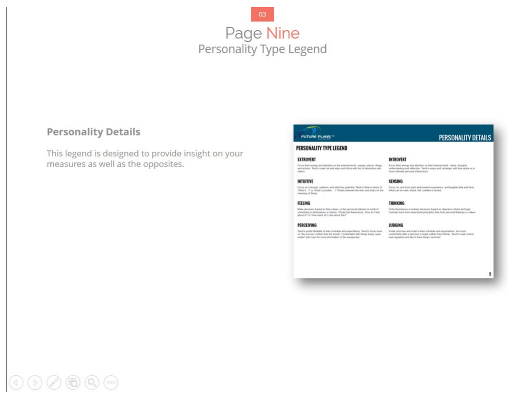
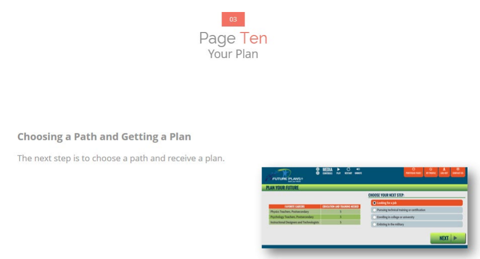
Research by psychologists indicate that there is also no evidence to show a positive relation between MBTI type and success within an occupation. That is, there is nothing to show that ESFPs are better or worse salespeople than INTJs are. Nor is there any data to suggest that specific types are more satisfied within specific occupations than are other types, or that they stay longer in one occupation than do others.

Also, the bimodal nature of the assessment brings into question its' validity. It provides a general preference, but does not consider situational behavior; the creator of the test himself agreed that people don't work this way, no normal person is either 100% extrovert or 100% introvert.

In summary, it appears that the MBTI does not conform to many of the basic standards expected of psychological tests. Many very specific predictions about the MBTI have not been confirmed or have been proved wrong. There is no obvious evidence that there are 16 unique categories in which all people can be placed. There is no evidence that scores generated by the MBTI reflect the stable and unchanging personality traits that are claimed to be measured

		(people have noted that their outcomes change as they mature, or even with their mood at the time they took the assessment). *In a recent review of the MBTI, commissioned by the Army Research Institute, it was concluded that the instrument should not be used for career planning counseling. The Institute's analysis of the available research showed no evidence for the utility of the test. Indeed, with respect to career planning they note that "the types may simply be an example of stereotypes.“* *CPP, (the publishers who own the rights to MBTI and sell the product along with certification for MBTI interpretation) do a very good job of promoting the test and providing support for its users. The MBTI also has much intuitive appeal. The descriptions of each type are generally flattering and sufficiently vague so that most people will accept the statements as true of themselves. If you tell people that they are "innovative thinkers and good problem solvers, and good at understanding and motivating people, but may have trouble following through on details of a project," they will believe that the statement is an accurate description of themselves regardless of the truth of the statement. This phenomenon is known as the "Barnum Effect," named in honor of the great entertainer.* *PRO* *CPP (again, this is the company that holds the rights to the MBTI assessment and so has financial stake in the assessment) states that their data on correlations between Type and Occupation can identify potentially good matches between the pattern of personality and the requirements of an occupation.* *Individuals perception of the test as a viable career planning tool often relate to the longevity and amount of information pertaining to its’ use for this purpose. Information is readily available on-line with many organizations supporting the use of MBTI for career planning. To get a list of potential jobs by personality type, the individual can Google careers for (insert type here).* *Notes:* *Another interesting/related (and considered more accurate) activity is a book called StrengthsFinder 2.0 from Gallup. My team at work used this assessment to uncover certain key talents -- patterns of thought, feeling, and behavior that can be productively applied.*

		These patterns are categorized into 34 broad themes -- such as Achiever, Ideation, and Relator -- and those themes indicate and predict one's innate and unique talents. We use it at work to help manage workloads by allowing people to focus on their strengths to increase our success while also allowing people to do things that match nicely with their skills. *CONCLUSION* *The MBTI given as it's informative and interesting for customers, however, the outcome of this assessment does not impact the recommended careers list. Psychologists do not recognize this assessment as an effective career planning tool; there is a large body of research that suggests that the claims made about the MBTI cannot be supported because although the MBTI appears to measure something, many psychologists are not convinced that any significant conclusions can be based on the test. Inclusion of this assessment by FuturePlans may reflect the fact that the MBTI is promoted heavily by the company that currently sells the assessment product; many customers expect to have this assessment as part of any career planning discussion.* *MBTI can be informative when used for other purposes. For example, in a previous training each attendee took the MBTI that provided numeric scores. The facilitator lined up everyone in the department line up around the room from most extroverted to most introverted to help us understand how we can communicate (or better understand others communication styles). Looking around the room, we recognized that the line-up was accurate. We then focused on improving our communication skills by learning about the needs and behaviors of others.* *Another example, if you place my desk (I scored 66% on the introvert scale) next to someone who is a strong extrovert, we will have to compromise a bit to ensure that our work relationship goes well. I have to understand that my counterpart gets energy by talking with and being around people, so that person is likely to come bouncing into my space to chat. My counterpart will have to understand that while I really do like them personally, I work better when left on my own to concentrate, and that socializing takes a lot of energy out of me.* *Facilitator – if you can identify a similar personal experience, share your story in lieu of the information provided.*

Slide 71	1	 **[Say]** Personality type legend goes beyond the brief description of the individual's personality type to describe each of the possible types that are combined to create an individuals' typology.
Slide 72	3	 **[Say]** When your job seeker completes the assessment and chooses their favorite jobs, they will land on a page that shows their favorite careers on a table with the education and training needed for that career. Next to that table is an area where they will choose their next step with four pathways (look for a job, pursuing technical training or certification, enrolling in college or university, enlisting in the military). *CLICK to advance this slide* Once your job seeker has determined the path they would like to take, they will focus on their next steps. This plan is included in their report, and you should encourage your job seeker to use it! The

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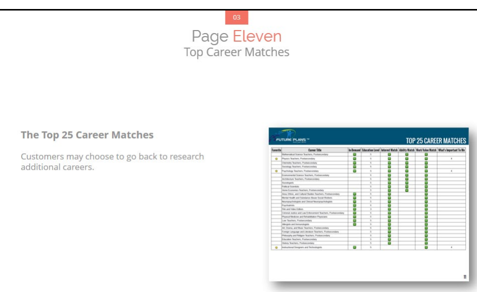
<tr><td></td><td></td><td>plan outlines the next steps the job seeker will need to make according to their interests provided on the previous screen. There are also several links that provide support, information, and training how-to designed to help them complete key tasks. For example, here we have the checklist for “Looking for a job” that provides checks and links for things like writing a resume, preparing for an interview, and setting up a LinkedIn profile.

Again, as an advisor, you will find that these lists are very handy. Many people are overwhelmed by unemployment and can easily get “stuck”; these planning documents not only serve as an organizational tool, they also allow the individual to gain a sense of accomplishment each time they can check something else off their list. As mentioned previously, as an advisor, you may need to supplement these lists with other information and support for your customer. If, for example, during your conversation you find the individual has a barrier they need to overcome before being “job ready”, you will want to provide a similar checklist to help your customer overcome their barrier(s).</td></tr>
<tr><td>Slide 73</td><td>8</td><td>

[Say]
The top 25 career matches are also included in the report; this serves as an easy reference offline for individuals who are still identifying their best choice. When reviewing this information with your customer, consider the following:

In-Demand – if a job is not in demand it may mean that the individual may be preparing for a career that will not connect them to employment, which is their goal.

Labor markets, like anywhere else in the economy, are influenced by the laws of supply and demand. There is correlation between a position being in-demand, the supply of workers available, and the</td></tr>
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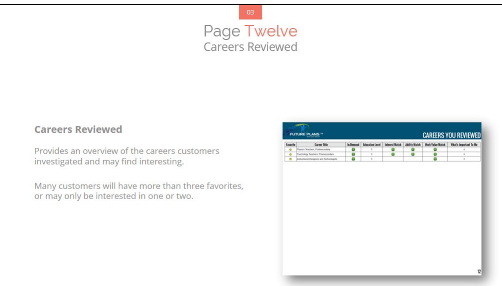
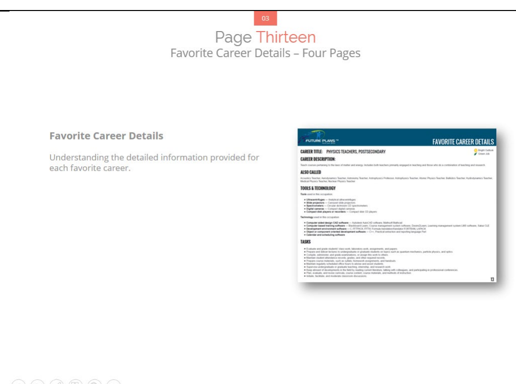
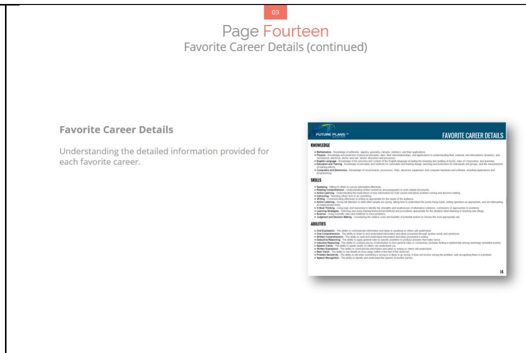
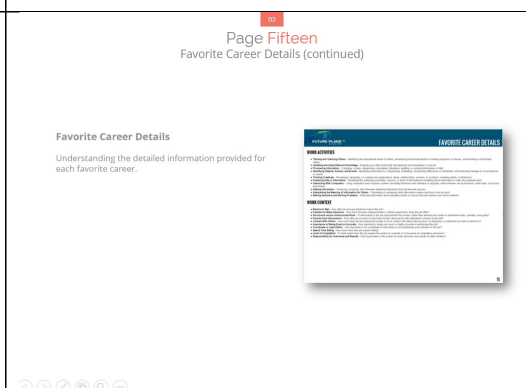
		leverage they will have as a job seeker. For example, this person has both mathematical science teacher and physics teacher on their list. While both jobs are in-demand, there is a $15,000 per year difference in median wage with physics teachers making more money for doing a very similar job that requires the same level of education. This is because there are fewer physics teachers available to fill open positions. Leverage can go beyond salary, and include other perks like benefits and job security. At the same time, you may find that some positions, such as retail worker or food services are in high demand, but because these jobs require little preparation there is a lot of people who can fill them (high supply). As such, these jobs tend to earn somewhere around minimum wage, and because the individual can be easily replaced, management is not going to take extraordinary steps to keep them working and happy. *Education Level* – this example shows us mostly 5's which represents a minimum requirement of a Master's degree and in some cases a PhD. It's important for the customer to talk this through with a coach, because the decision to return to school is a big one. Here are some tips to keep in mind: 1. Formal education is usually a long-term goal that should be encouraged if the customer indicates interest; however, using powerful questions, help the person recognize that because it's long-term, they should figure out if they can complete their education while they work as very few adults have the luxury of stepping away from their financial responsibilities to take time off to go to school. If someone says, "I want to be an astronaut", it's not your responsibility to crush their dreams. 2. Technical training takes less time and will allow a customer to supplement their education in a way that is very appealing to employers, however, make sure that the certification is appropriate for the customer. You will find that many programs are offered, and can often be paid for through grant funding. Certification alone may not be sufficient to qualify an individual for a job. For example, if someone who has worked as an administrative assistant earns a certification in Computer Programming, they will not easily find a job as a programmer because most employers are looking for someone who also has a degree in the field. A certification in programming may be useful for someone

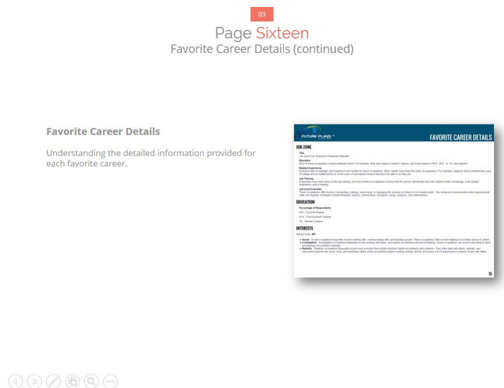
		who is already a programmer who needs to bring their skills up to date, or learn a new programming language. This type of certification may also be useful for someone who has worked in a similar technology field where programming skills would be an additional asset. Take the time to ensure that the certification, combined with the customers' previous experience and education, will help the individual become more marketable. 3. How long does this individual intend to stay in the workforce? Calculate the potential earnings vs. investment to help the customer set an appropriate goal. Another consideration is time; do they have responsibilities or opportunities in their lives right now that they will step away from to attend? What resources (i.e. distance learning) can they use to help them find balance? 4. Encourage customers to complete a FAFSA and try to identify any grants or scholarships they may earn. If they are serious about attending college, have them target the college of their choice as a potential employer because colleges often cover tuition for employees. They can also target companies that offer tuition reimbursement as a benefit. *Interest Match* – This goes back to the interest inventory we reviewed earlier (RAISEC). This individual has favorited a career that is not an interest match for them; in this case, make sure the customer thoroughly reviews the career profile to ensure that they will be happy with the tasks and activities they will need to do to perform this job. *Ability Match* – The ability match area only considers the top three scores from the various ability assessments. If a customer chooses a career that does not match their abilities as presented by their report, draw the customers' attention to the abilities area of the job profile. *Notes: the abilities tested for in the FuturePlans assessment match up loosely with the abilities section of O*NET and DOL job profiles, however, they are called different things. For example, what FuturePlans calls "Diagnostic Reasoning" matches what O*NET/the job profile calls "Inductive Reasoning". What FuturePlans has labelled "Analytical Reasoning" matches up with the job profile "Deductive Reasoning", and so on. You will also find that the job profile includes abilities that have a less direct correlation with the*

		*FuturePlans assessments, but are relative; for example, "Vocabulary" can impact several of the communication areas of the job profile abilities are*a. *Work Value Match* – ties into the top two of six values discussed earlier (for this person, top values were achievement and independence) *What's Important to Me* – the customer must go into the career profile and select the appropriate statements that reflect how this job will tie in with their values.
Slide 74	5	 **[Say]** Careers reviewed shows which titles the customer investigated by clicking on the job title. This list may be helpful if an individual has identified more than three career titles they are interested in but may indicate that they should do additional research to determine their absolute top three favorites. You may also find that some individuals have selected three favorites because they had to, but are only really focused on one or two of those job titles. **[Discuss]** Why do you think they set a limit of three? Do you think job seekers should be offered more or fewer choices? Why? *The importance of setting limits: a customer without goals can have many "squirrel" moments… I could do this, or this, or this, or hey look, these people are having a job fair, maybe I should go back to school, or ooh, start my own business! Goals provide focus and the ability to plan for success, so if you have someone who really doesn't know what they want to do and this person is being pulled in a million directions but making progress in none, it's time to sit down and figure things out. Have the customer first list all of their*

		potential goals, then create a "positives vs. negatives" "T" format list for each goal. Include risks and rewards. Have them also consider gaps; gaps describe what the person already knows and can do vs. what they must learn to be able to successfully get the job they want. After a couple rounds of consideration, an extensive list of possibilities should become something more realistic and attainable. They don't have to give up on a dream; they just should set both short and long-term goals. *Taking off the blinders: just as important is having a Plan "B". If your customer is so entirely focused on a single job and that job doesn't come through, it can be a disaster. Dream jobs usually involve an employer and a specific job title. Some things a customer may consider: (1) focus on the employer, and take any position that will allow the customer to get his/her foot in the door with an eye on working themselves into the job they want. (2) seeking the same job title/responsibilities elsewhere and gain more experience as he/she continues to apply for the dream job. (3) be flexible enough to consider what else they can do. Sometimes the job market changes so drastically that a customer is unlikely to find the work they want to do at the salary they expect to make; that's a hard pill to swallow because no one wants to have to move backwards in their career. When faced with a customer in this situation you may find they are very distressed or will move slowly (reluctantly) into their next job.*
Slide 75	5	 **[Say]** Let's discuss the Favorite Career Details The report will contain career details for all three of the customers' favorite careers. Let's walk through one of them to review the information that is provided.

		(Note: this report is generated from BLS.gov and the information can also be accessed from Onetonline.org. Both sites provide a searchable database where you can easily get information on any job title. They also provide additional links and information.) *Career Title:* the job title as provided by the Bureau of Labor Statistics which can be very precise in their nomenclature. *Career description* – provides a quick overview of the job *Also called* – This area shows examples of job titles provided by incumbent workers. If your customer is doing job search, they may want to consider additional job titles as many companies use different language. Here we have physics teachers, postsecondary which could also be a professor, assistant professor, faculty member, instructor, adjunct instructor/professor. It could also be a specific branch of physics, such as astrophysics, atomic, or nuclear physics. Use the "also called" area to find job search terms, and don't be afraid to add more. *Tools and Technology* – Includes the top five most used tools (machines, equipment, and tools) and technologies (devices and software) used. This is only a partial list, but it provides valuable information regarding the top most sought after things. This information can also be used when writing a resume, as these terms will probably be keywords. A more complete list, including "hot technology" tags can be found at the sites listed above. *Tasks* – specific work activities that can be unique for each occupation; this list shows the top ten things a person does in that position. Note: *O*NET lists 22 tasks, and a link to find occupations related to multiple tasks which is useful for those who want to change their career by focusing on transferable skills.*

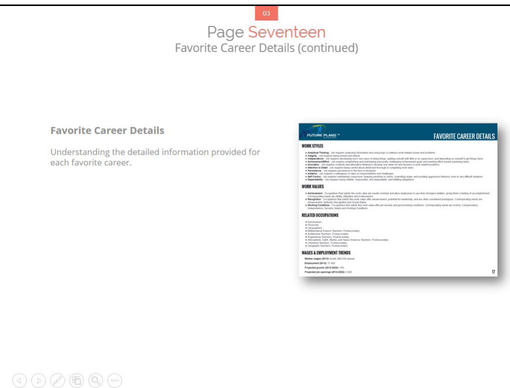
Slide 76	3	 *Knowledge* – organized sets of principles and facts that apply to a wide range of situations. For example, here we have mathematics listed as a required knowledge; this is because we do a lot of calculations in physics. *Skills* – developed capacities that facilitate learning and the performance of activities that occur across jobs. *Abilities* – enduring attributes of an individual that influence performance
Slide 77	2	 *Work activities* – provide information on the common work activities required across occupations. These are less specific than tasks, which are occupationally specific, and provide information on the common work activities. *Work context* – refers to the physical and social factors that influence the nature of work

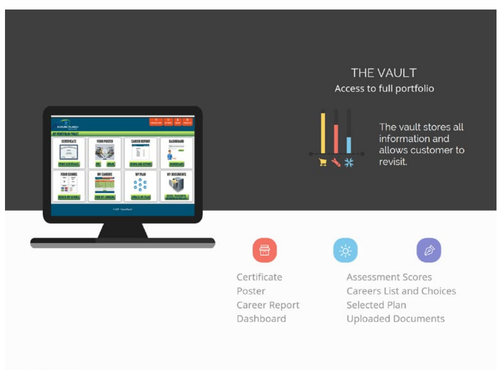
Slide 78	3	 *Job zone* – occupations with similar experience, education, and training requirements are grouped together into one of the five job zones. Considered are (1) how much education people need to do the work, (2) how much related experience people need to do the work, and (3) how much on-the-job training people need to do the work. *Background notes for facilitator:* ***Specific Vocational Preparation (SVP)*** *Specific Vocational Preparation is a component of Worker Characteristics information found in the Dictionary of Occupational Titles (U.S. Department of Labor, 1991).* *Specific Vocational Preparation, as defined in Appendix C of the Dictionary of Occupational Titles, is the amount of lapsed time required by a typical worker to learn the techniques, acquire the information, and develop the facility needed for average performance in a specific job-worker situation.* *Specific vocational training includes training given in any of the following circumstances:* *Vocational education (high school, commercial or shop training, technical school, art school, and that part of college training which is organized around a specific vocational objective)* *Apprenticeship training (for some jobs only)* *In-plant training (organized classroom study provided by an employer)* *On-the-job training (serving as learner or trainee on the job under the instruction of a qualified worker)*

		Essential experience in other jobs (serving in less responsible jobs, which lead to the higher-grade job, or serving in other jobs which qualify). *The following is an explanation of the various levels of specific vocational preparation:* *Level Time* *1. Short demonstration only* *2. Anything beyond short demonstration up to and including 1 month* *3. Over 1 month up to and including 3 months* *4. Over 3 months up to and including 6 months* *5. Over 6 months up to and including 1 year* *6. Over 1 year up to and including 2 years* *7. Over 2 years up to and including 4 years* *8. Over 4 years up to and including 10 years* *9. Over 10 years* *Note: The levels of this scale are mutually exclusive and do not overlap. When describing these zones to customers, I would typically relate it to education and provide a couple examples of job titles from the zone rather than going into specifics. The specifics will be spelled out in the packet.* ***Job Zone One: Little or No Preparation Needed*** *Education: Some of these occupations may require a high school diploma or GED certificate.* *Related Experience: Little or no previous work-related skill, knowledge, or experience is needed for these occupations. For example, a person can become a waiter or waitress even if he/she has never worked before.* *Job Training: Employees in these occupations need anywhere from a few days to a few months of training. Usually, an experienced worker could show you how to do the job.* *Job Zone Examples: These occupations involve following instructions and helping others. Examples include counter and rental clerks, dishwashers, cashiers, furniture finishers, logging equipment operators, and baristas.* *SVP Range: (Below 4.0)* ***Job Zone Two: Some Preparation Needed***

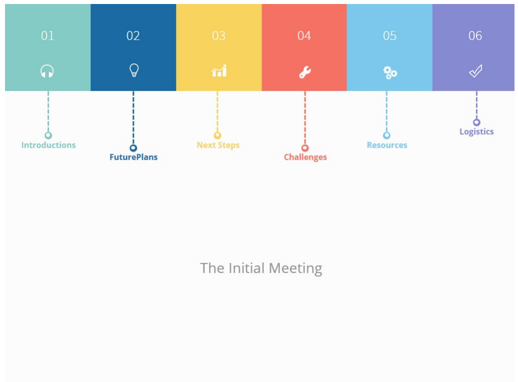
		Education: These occupations usually require a high school diploma. *Related Experience: Some previous work-related skill, knowledge, or experience is usually needed. For example, a teller would benefit from experience working directly with the public.* *Job Training: Employees in these occupations need anywhere from a few months to one year of working with experienced employees. A recognized apprenticeship program may be associated with these occupations.* *Job Zone Examples: These occupations often involve using your knowledge and skills to help others. Examples include orderlies, forest firefighters, customer service representatives, security guards, upholsterers, and tellers.* *SVP Range: (4.0 to < 6.0)* ***Job Zone Three: Medium Preparation Needed*** *Education: Most occupations in this zone require training in vocational schools, related on-the-job experience, or an associate's degree.* *Related Experience: Previous work-related skill, knowledge, or experience is required for these occupations. For example, an electrician must have completed three or four years of apprenticeship or several years of vocational training, and often must have passed a licensing exam, in order to perform the job.* *Job Training: Employees in these occupations usually need one or two years of training involving both on-the-job experience and informal training with experienced workers. A recognized apprenticeship program may be associated with these occupations.* *Job Zone Examples: These occupations usually involve using communication and organizational skills to coordinate, supervise, manage, or train others to accomplish goals. Examples include food service managers, travel guides, electricians, agricultural technicians, barbers, nannies, and medical assistants.* *SVP Range (6.0 to < 7.0)* ***Job Zone Four: Considerable Preparation Needed*** *Education: Most of these occupations require a four-year bachelor's degree, but some do not.*

		Related Experience: A considerable amount of work-related skill, knowledge, or experience is needed for these occupations. For example, an accountant must complete four years of college and work for several years in accounting to be considered qualified. *Job Training: Employees in these occupations usually need several years of work-related experience, on-the-job training, and/or vocational training.* *Job Zone Examples: Many of these occupations involve coordinating, supervising, managing, or training others. Examples include accountants, sales managers, database administrators, graphic designers, chemists, art directors, and cost estimators.* *SVP Range (7.0 to < 8.0)* ***Job Zone Five: Extensive Preparation Needed*** *Education: Most of these occupations require graduate school. For example, they may require a master's degree, and some require a Ph.D., M.D., or J.D. (law degree).* *Related Experience: Extensive skill, knowledge, and experience are needed for these occupations. Many require more than five years of experience. For example, surgeons must complete four years of college and an additional five to seven years of specialized medical training to be able to do their job.* *Job Training: Employees may need some on-the-job training, but most of these occupations assume that the person will already have the required skills, knowledge, work-related experience, and/or training.* *Job Zone Examples: These occupations often involve coordinating, training, supervising, or managing the activities of others to accomplish goals. Very advanced communication and organizational skills are required. Examples include librarians, lawyers, astronomers, biologists, clergy, surgeons, and veterinarians.* *SVP Range (8.0 and above)* *Education – summary data on the level of education required or this occupation*

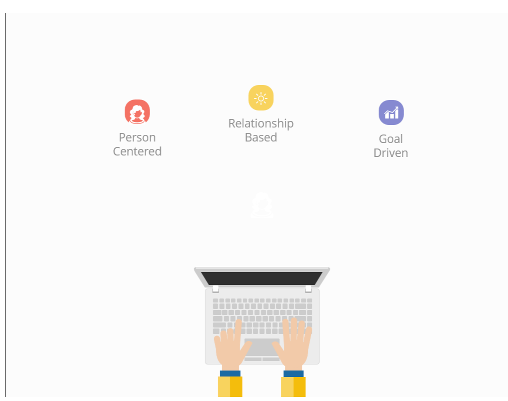
		Interests – Interests indicate a person's preferences for work environments and outcomes (SIR = social, investigative, realistic taken from the earlier interest assessment)
Slide 79	2	 **[Say]** *Work Styles* – personal characteristics that an affect how well someone does at a job *Work values* – global aspects of work that are important to a person's satisfaction *Related occupations* – individuals looking to change careers can pursue these occupations with minimal additional preparation *Wages and Employment Trends* – summary national wage and employment data is provided; visit BLS, O*NET or CareerOneStop to obtain state specific data

Slide 80	1	 *Transition* **[Say]** Finally, let’s take a look at the vault. As an administrator, the information held in the vault will be very helpful for you as you begin to advise the customer.
Slide 81	2	 Once the online assessments and activities are complete, the customer can access all of their information on-line through their vault. The vault holds copies of the customers’ certificate, poster, report, and more. This space also includes a documents area where the customer can upload important documents. I suggest the customer consider providing documents such as a resume, a list of references, and a sheet that provides all of the information they will probably need when completing an application, such as employer names, dates, addresses, contacts, etc.

Slide 82	5	 *Note: We are one hour from the end of training; depending on how you are doing with time, you may want to provide a short break.* **[Challenge]** With our remaining time, we’re going to talk about the first and second meetings and provide you with a format for conducting the initial interview and a follow-up meeting with the customer. To help you learn more, we’re going to break you into groups of three or more and have you do “real play”, which is what I call role play that has real world applications. *Break audience into small groups of three or more to do a real play: one counselor, one customer, one (or more if necessary) observer (note taker). Have customers switch roles; with each switch, have groups report out on what they have learned/observed.* *In the participant packet are the processes for the first and second meetings. The initial meeting is an information gathering and introduction time. The second meeting is to review the FuturePlans report.* *Use the next two slides to outline the sessions; a copy of this information is also in the Participant Guide. They can use these outlines to guide their mock interviews.*

Slide 83	20	 **[Challenge]** The first meeting between coach and client is a critical one. If it does not work well enough, then all future meetings are at risk. **Before you meet** Before you meet, start the process of assessing the client, finding what you can. However, do not form a fixed opinion of them and stay open for some time after meeting too. People are complex and we easily simplify them. **Prepare** Prepare, prepare. It's a large part of the secret of success, especially for the first meeting. **At the start** The first few seconds Humans connect very quickly and develop opinions about the other person in the first few seconds. The customer may or may not have experience of coaches and will hence have varying expectations. Start with confidence. Say hello with a smile, looking at them calmly. Say their name and how pleased you are to meet them. Say your name and move into the next steps. **The first few minutes** Start with them. Ask them what they are expecting. Listen and watch to read between the lines to try and understand the person and any anxieties they may have. They may be concerned about what 'coaching' means. Explain information clearly, concisely and positively.

		Clarify confidentiality An early point to make is about confidentiality. Coaches are sometimes obliged to share some information. Be clear and honest about this. In general, though, as much confidentiality as you can promise is a very good thing. If you are going to share information about the customer, agree this beforehand, then show them the information. Maintaining trust in this is critical. **Sell the process** Your client may have a very different idea from you as to how the coaching process is going to proceed. If you have a different idea or have been mandated differently from elsewhere, then you should sell the process. For example, your customer may be worried about the idea of the 360-degree FuturePlans assessments that could show them up to be less than perfect. Frame the process in terms of outcomes. Sell the benefit first before talking about the methods. Encourage them by saying you’re there to help meet their needs and that coaching can help. Frame coaching overall as a career-enhancing opportunity. Do not, however, over-sell the process. Do not promise to find someone a job. Do not say what will be achieved in a given timescale because much of the customers’ success will rely on their own participation. **Establish ground rules** Take time to agree the rules and process by which you and they will work. This includes the time you will meet and the effort that the customer will put into other activities between sessions. You may also need to agree that you, as coach, will sometimes need to appear critical and say things that others might not say, albeit in support of their longer-term development. You may need to make and refer to notes during the sessions -- it is usually worth mentioning this too. Ensure these rules appear fair and reasonable to them. Rules that seem just to benefit the coach are not the basis for a good relationship. On the other hand, this is also a time to show your need for assertiveness. A coach who rolls over at the smallest criticism will not be successful. Thus, for example, ask them to give you at least a one day notice if they need to cancel.

		Set the first goal End the meeting with an objective for the client to complete before the next meeting. The first goal should be to complete the FuturePlans assessment and provide you with a copy of the report (paper or electronic); let the customer know you will use this information in the next meeting. One clear indicator of success for you as a coach will be if the individual completes follow-up tasks completely and in a timely manner. Use the step by step instruction sheet to provide the customer with guidance on how to access and complete the FuturePlans assessment. **Ending the meeting** End the meeting with a health check, asking how they are feeling. Summarize agreements about goals (including any commitments you have made) and agree the time for the next meeting. If they can call you between meetings, ensure they know this and have your number. Finally, don't forget to provide the customer with a set of written instructions on how to access the FuturePlans website and log-in. **After the meeting** Immediately after the meeting, review your notes and add other thoughts whilst they are fresh in your memory. Write your customer an email or memo, summarizing what you have agreed.
Slide 84	20	 **[Say]**

<table>
<tr>
<td></td>
<td></td>
<td>Second Meeting
Review the customers FuturePlans report
Discuss path and next steps
Identify and challenges/barriers the customer may face (transportation, child care, skills gaps, etc.)
Provide support and information about resources available
- Remember to use powerful questions!

Focus: Understand the customer’s goals and keep up-to-date on what they are working on.

Responsibilities: Your responsibility is not to find the person a job, rather to offer guidance and support as they own their decisions and actions

Plan: Discuss the customers’ next steps in achieving their plan (provide a simple checklist if needed)</td>
</tr>
<tr>
<td>Slide 85</td>
<td>10</td>
<td>

Discuss any questions learners may have.

ASK ROOM TO COMPLETE “RATE YOUR PRACTICE” QUESTIONS 8-9 AND MODULE 3 “TAKE ACTION” PAGES

[Summarize]
Exit ticket – go around the room and ask participants to list the two things they learned today that they will employ immediately</td>
</tr>
</table>

Appendix I – Flipcharts and Materials

Appendix II – Pre- and Post-Assessments

Appendix III – Participant Worksheets

Rate Your Practice

Practice		Low									High
1.	I provide customer-centered service	1	2	3	4	5	6	7	8	9	10
2.	I understand and use powerful/open-ended questions	1	2	3	4	5	6	7	8	9	10
3.	I set SMART goals rather than general goals	1	2	3	4	5	6	7	8	9	10
4.	I know about resources available to combat customer barriers	1	2	3	4	5	6	7	8	9	10
5.	I exhibit good listening skills	1	2	3	4	5	6	7	8	9	10
6.	I am attuned to others' emotions	1	2	3	4	5	6	7	8	9	10
7.	I engage in proactive listening and use the appropriate cues	1	2	3	4	5	6	7	8	9	10
8.	I understand the FuturePlans assessment results	1	2	3	4	5	6	7	8	9	10
9.	I am ready to coach customers using FuturePlans	1	2	3	4	5	6	7	8	9	10

Take Action

Module	Start	Stop	Continue
Module 1 Coaching Skills			
Module 2 Communications			
Module 3 Future Plans			

Instructions: *This Emotional Intelligence Assessment[1] is designed to give you a general idea of your EI strengths. Please read each statement below and mark the number that best describes how you feel about the statement.*

Self-Awareness My Self-Awareness Score: _______	Almost never or never	Rarely	Sometimes	Often	Almost Always or Always
I can identify and describe how I am feeling.	0	1	2	3	4
I have thought about how my feelings have distracted, enhanced, or challenged me this week.	0	1	2	3	4
I know when I judge or make assumptions about others, as I do it.	0	1	2	3	4
I can observe my emotions without passing judgement on them and without defining them as good or bad.	0	1	2	3	4
I know what external events of the day impact my mood when I get home.	0	1	2	3	4
I can sense when I'm becoming angry before it shows.	0	1	2	3	4
I can tell others what I truly, genuinely feel in the present moment.	0	1	2	3	4
I am comfortable, even confident, in my limitations and weaknesses.	0	1	2	3	4
I make time for myself to experience my emotions/deeper thoughts	0	1	2	3	4
I accurately predict how I will feel in various situations.	0	1	2	3	4
Self-Management My Self-Management Score: _______	Almost never or never	Rarely	Sometimes	Often	Almost Always or Always
I make goals and stick to them.	0	1	2	3	4
I adapt well to working with different people in different situations.	0	1	2	3	4
It is easy to accept responsibility for the way I react.	0	1	2	3	4
I make choices that are aligned with my values.	0	1	2	3	4
I direct my energy into positive outlets, like creative work or hobbies.	0	1	2	3	4
Even when I am stressed, I find it easy to remain composed.	0	1	2	3	4

[1] *Adapted from a model by Paul Mohapel (paul.mohapel@shaw.ca)

I see things from multiple perspectives.	0	1	2	3	4
Change is easy for me.	0	1	2	3	4
I am in control of my impulses.	0	1	2	3	4
If I get angry, I can calm down and move on quickly.	0	1	2	3	4

Social Awareness My Social-Awareness Score: _______	Almost never or never	Rarely	Sometimes	Often	Almost Always or Always
I see how my actions affect the people around me.	0	1	2	3	4
I am good at knowing when to voice my opinion and when not to.	0	1	2	3	4
I have a good sense of what others expect of me.	0	1	2	3	4
It is easy to figure out the power dynamics and politics in a group.	0	1	2	3	4
I understand others' feelings, even if I would not feel the same way.	0	1	2	3	4
I show heartfelt interest in the challenges and successes of loved ones.	0	1	2	3	4
It genuinely bothers me to see other people sad or hurting.	0	1	2	3	4
I know when I've annoyed someone, even if we are on phone.	0	1	2	3	4
I anticipate what other people need.	0	1	2	3	4
I can tell when someone isn't being genuine or honest.	0	1	2	3	4
Relationship Management My Relationship Management Score: _______	Almost never or never	Rarely	Sometimes	Often	Almost Always or Always
I'm good an influencing people to do what I think is best.	0	1	2	3	4
I can anticipate conflict and diffuse the situation, if needed.	0	1	2	3	4
I'm the one who builds consensus when people disagree.	0	1	2	3	4
Others tell me that I'm motivational and inspiring.	0	1	2	3	4
If plans change, I am the person who helps others adjust to the new situation.	0	1	2	3	4
Wherever I go, I am able to make new friends.	0	1	2	3	4
At social events, I contribute to the conversation and fun.	0	1	2	3	4
The teams that I am on are collaborative.	0	1	2	3	4
I sense the developmental needs of other people, and help them grow.	0	1	2	3	4
My relationships are drama free.	0	1	2	3	4

Mark your EQ total scores to assess your strengths and areas for improvement					
Domain	**My Scores - My EQ Strengths!**				
Self-Awareness	0 2 4 6 8	10 12 14 16	18 20 22 24	26 28 30 32 34	36 38 40
Self-Management	0 2 4 6 8	10 12 14 16	18 20 22 24	26 28 30 32 34	36 38 40
Social Awareness	0 2 4 6 8	10 12 14 16	18 20 22 24	26 28 30 32 34	36 38 40
Relationship Management	0 2 4 6 8	10 12 14 16	18 20 22 24	26 28 30 32 34	36 38 40

Measure your effectiveness in each domain using the following key:	
0 - 24	Area for Enrichment: Requires attention and development
25 - 34	Effective Functioning: Consider strengthening
35 - 40	Enhanced Skills: Use as leverage to develop weaker areas

Reflect and Plan: Emotional Intelligence

Individual Reflection and Planning:

1. Look at your strongest EI domain and write an example of how you demonstrate this strength in your daily work.

____

____

____

____

2. Look at your weakest EI domain and write an example of how this growth area impacts your daily work.

____

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____

____

3. For your weakest EI domain, write specific steps you think could help you to improve in this area? This could include mental attitudes you want to cultivate, or specific actions you can take to help build this area. If you don’t know how to improve, what resources do you have that you could utilize to help?

Appendix IV – Sample FuturePlans Reports