**September 20, 2018 - NOTES**

**Managing Expectations: Making Short-Term Career Counseling Work**

Renee: Shared experience with brief counseling services.

Heidi: Reasons to offer time-limited/a la carte services:

* Companies are pressuring us (consulting services) to provide low-cost services
* Clients are seeking them, particularly millennials – they are tech savvy and used to searching and shopping for goods and services online
* Competitors are offering them (e.g., The Muse)
* Move toward coaching rather than in-depth counseling

Clients are savvy and can shop around for services online. If they are seeking these services and others are offering them, it makes sense for us to offer them and deliver them in a manner that conforms to our standards as professionals.

My story, starting with ReadyMinds (2001) – no matter how much time we have together, I can provide something useful to the client. It’s all about managing expectations.

* All new learning for me: distance, technology, time-limited
* Time-limited, structured program with clear deliverables and parameters (pre-assessments – quantitative and qualitative), specific amount of counseling time, follow up report
* Developed shorter programs in response to client (organizational) demands
* Found that no matter how little time I had with the client, I could provide something useful and use the time in a productive and meaningful way
* Similar experience and evolution at REA
* Influenced my behavior/methods in private practice: qualitative pre-assessment (intake form); goal setting, email follow up (even if just a resource or two) after every session (with rare exceptions)

Managing expectations: what can we do with the time we have/within the parameters of the service? What is the most important goal/outcome? What is realistic to accomplish in the given time frame? Help shape the experience for the client so s/he knows what to expect, how the process will work, and what the anticipated outcome will be. What is counselor’s responsibility/client’s responsibility?

Shift from process to product/outcome. In my practice (and at Muse), clients come for a specific service, then later another. If we have built rapport and they are satisfied, they come back when they need help. Transactional, rather than explorational and process oriented. This does not mean that there is no exploration or process; we can still “go deep” and do meaningful work, but it needs to be managed appropriately. We, as career counselors, have an ethical responsibility to practice within our range of knowledge and expertise, and this applies to whatever type of service we provide, of any duration.

The client needs to feel heard and understood. Even if we are only working with them for one session, we need to build rapport and demonstrate our grasp of the issues they bring into the counseling process.

**Tools:**

* Pre-assessment (qualitative) – helps you to get info in advance so you can hit the ground running in session. Also gets the client thinking about the issues that are important, gets the wheels turning for them, prepares them for the conversation.
* Follow up email/report – gives them the tools to continue the work beyond the session. Empowering. “Teaching to fish.” Quote from ReadyMinds book
* Resources - include in follow up email.

**View Muse website**

* Menu of services
* Menu of coaches
* Resources (job postings, company profiles, articles)

Working via telephone or Skype is convenient and allows the client to engage in the process in a comfortable location. No travel involved. Since both counselor and client are settled, comfortable and ready to start at the onset of the conversation, there are no “settling in” issues. Distance counseling via phone or Skype often progresses more rapidly and efficiently. Client also has more choices – not limited to someone in his/her geographical area. Can search for someone with a particular area of expertise. If the client lives in an area where options are limited, or has confidentiality/dual relationship concerns, s/he has a range of options via distance. Skype can be very useful because of screen share feature. Allows you to view LinkedIn profile, demonstrate features of LinkedIn, show websites, etc.

**Building resource library:**

* Helpful to have go-to sites with good advice on a range of topics, such as <https://www.job-hunt.org>
* Good sites for articles: <https://themuse.com> , <https://www.forbes.com/careers/>
* NCDA has a resource section (for clients) on their website: <https://www.ncda.org>
* Keep a list of resources you’ve used so you don’t have to keep looking them up

See next page for “Sample Intake Form (for Short Term Career Coaching)”

**Sample Intake Form (for Short Term Career Counseling)**

**Your Coaching Practice Info:**

**Client Info:**

Name:

Address:

Phone:

Email:

Skype:

Current career field:

What is your current career goal?

Reason for seeking career assistance:

What are your strongest interests (whether they relate to your career goals or not)?

What are your skills (whether they relate to your career goals or not)?

What are your values (i.e., what is important to you?)?

What are your hobbies/leisure activities?

Can you identify any obstacles that may interfere with your ability to achieve your goals?

What would you like to gain from the career coaching experience?

Do you have a resume that you can submit?

Is there anything else you would like me to know about you?