

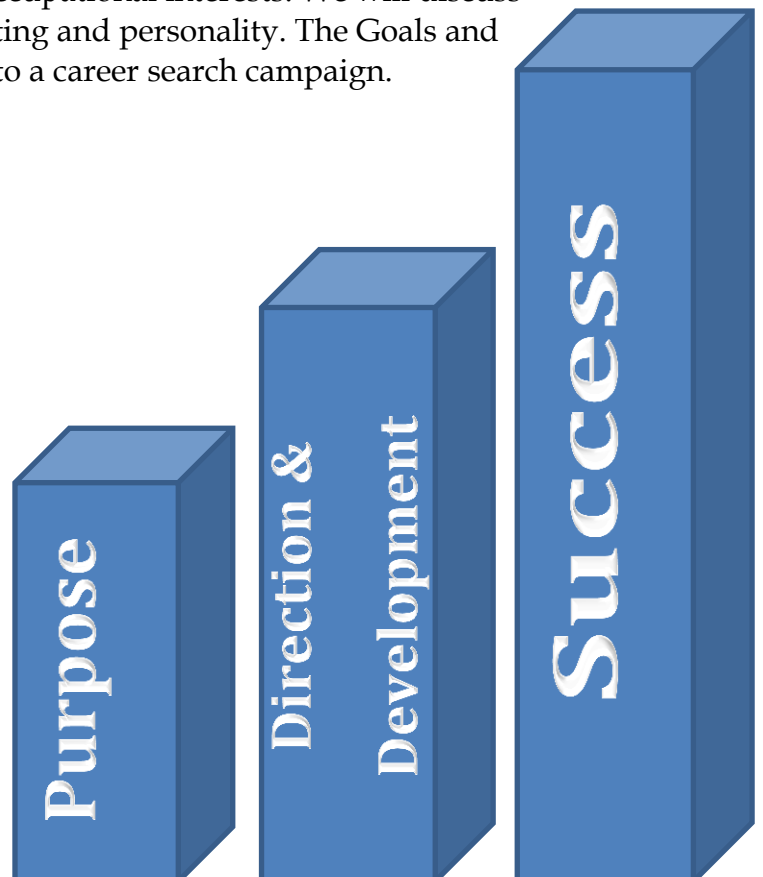
MEET THE CLIENT

Module II

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Module II Overview

This module focuses on developing purpose, goals, values, and motivation, direction, and application all tied to occupational interests. We will discuss occupational interests, assessment testing and personality. The Goals and Values exercises are key components to a career search campaign.



|| CAREER PURPOSE

"The man without purpose is like a ship without a rudder – a waif, a nothing, a no man." -Thomas Carlyle

Often times your clients will say, "I don't really know what to tell you about myself." Therefore, as a Career Coach, you can encourage your clients to spend energy learning about themselves and learning to tell others about themselves. It takes time, energy, and thinking.

We are all are driven by something – we all seek purpose. Some daydream about things that interest them or make them happy, i.e., becoming famous or rich. Some are driven by success and contentment, i.e., being known as a senior executive throughout the community. Some are motivated by negative factors, i.e., what they think their parents thought they should be when they grew up. Some are driven by circumstances, i.e., they take any job just to pay the bills and feed the children, after an unsuspected layoff. Some are driven by a big paycheck and materialism, i.e., keeping up with the Jones' – always needing/wanting the next new technology.

A purpose-motivated life encapsulates a whole person and it can provide a work-life balance. A person who recognizes his/her purpose – from a careers industry perspective – does not take a job or pursue a career to create a purpose, but rather designs a career path to allow the purpose to unfold.

Defining purpose is also interpreted as defining one's mission in life. Richard Bolles, author of *What Color is Your Parachute*, says that our natural gifts/talents and the value of serving others, helps us find our purpose or life mission. Purpose is a mission – our opportunity to give to our families, friends, employers, or society and it is directly related to our belief and value system.

Webster's Dictionary defines **purpose** as something set up as an object or end to be attained; a resolution, determination; a subject under discussion or an action in the course of execution.

Purposely means with deliberate or express purpose; intentionally.

Mission means a task assigned; to send a person to perform a service or task; a task or function undertaken. Knowing one's purpose simplifies life, according to Rick Warren, author of the *Purpose Driven Life*. "It defines what you do and what you don't do. Your purpose becomes the standard for what you use to evaluate which activities are essential and which are not."

Values

We live in a rich, materialistic society, yet more people are dissatisfied with their jobs and a record high number of Americans are on some type of antidepressant. Various studies conducted of American workers indicate that some 60% to 87% are dissatisfied with their jobs and careers. These are dismal statistics. We all desire to know our purpose and offer value to the world, and likewise be valued by our families and employers. Working in a profession that defies our basic value system, causes friction and disenchantment.

“It is wonderful to feel... that you were set here on earth for some special purpose and that you may gain some idea of what the purpose is... when we search for a mission we are searching for reassurance that the world is at least a little bit richer from our being here and a little bit poorer after our going,” Richard Bolles says.

Direction & Motivation

Without clear purpose, you are inclined to change directions in midstream. Purpose causes a person to become more selective and concentrate energies.

How many clients do you have in your files where their résumé lists some six different professions, job skipping, and didn't quite finish college, but somehow managed to make a decent living? “Just give me a general résumé. I can do anything,” they say. These clients, their résumés, and their career searches lack focus.

Or how about the client who wants to make a drastic career change, i.e., military officer/bomb disposal expert now wants to be in pharmaceutical sales (because he heard it pays well).

Or have you ever worked with a client who said, “I am miserable in my job.” The follow up question from the coach is, “Why are you miserable?” Answers may include, “I don't like the work.” “I don't like the boss.” “I am bored.” “I didn't get a raise.” Here is where the coach guides the client in understanding the underlying motivation to his “miserable” experience.

Career search clients benefit from identifying their purpose and writing a mission statement (an action plan to accomplish the purpose statement) – by understanding their values, motivations, and natural talents/gifts/abilities, combined with learned skills and knowledge, and pinpointing what makes them happy and fulfilled.

Application

Guiding a client to determine a life purpose and passion, and subsequently select appropriate professions, may reveal varied topics and interests:

- **Promote peace:** minister, missionary, writer/journalist, political advocate, military member, teacher
- **Save the environment:** Park ranger, environmental advocate, physicist, scientist, automobile designer
- **Help those in need:** Crisis management, doctor, philanthropist, humanitarian efforts, career coach, veterinarian
- **Get married and raise children:** School volunteer, hospital nursery volunteer, single mom mentor, orphanage or domestic abuse center work
- **Help people be beautiful:** Cosmetician, retail sales, plastic surgeon, florist, interior designer
- **Help the world be beautiful:** Architect, lawn/yard care management/landscaper, swimming pool builder, engineer
- **Make lots of money:** Business manager, entrepreneur, real estate agent
- **Heal sick people:** Doctor, nurse, plastic surgeon, epidemiologist

List 10 additional life/career purpose statements and potential employment opportunities to support the purpose(es):

1)

2)

3)

4)

5)

6)

7)

8)

9)

10)

“Effective mission statements balance the possible and the impossible. They give people a clear sense of direction...” -Jack Welch

Purpose creates focus. Understanding one’s motivational factors allows a client to create a mission statement. As career industry practitioners, a mission statement may read something like this:

Purpose: *Help people in need to find employment*

Career mission: *Career Coach*

Ensure clients find satisfying employment by the following:

- 1) Determine to provide the best-written résumés and career marketing documents possible.
- 2) Coach and train career seekers to attain satisfying employment to meet their needs and career requirements.
- 3) Strive for excellence as a career coach practitioner maintaining industry credentials and continual education.
- 4) Work as a sole practitioner or find satisfying employment as a career coach, counselor, résumé writer, and/or HR specialist.

The natural talents and gifts a career coach/résumé writer may possess include writing, public speaking, and excellent listening abilities. Skills that may be obtained include human resources, employment and personnel experience, and knowledge and use of career industry credentials (CPRW, CEIP, CPCC), for example.

A career coach/résumé writer may also use experience, skills, and talents at high schools, churches, and vocational services in a volunteer capacity to promote the main theme of helping people find fulfilling careers.

Answer the following questions to help you find your purpose:

What do you love to do?

(Write, fish, cook, teach, listen, drive, arrange flowers, design interiors, etc.?)

What do you think about all the time?

(Being famous, rich, or on TV; writing a book, saving the whales, raising children to be productive members of society, changing political agendas, helping the poor, other...?)

If you could do anything you wanted, and knew you would be successful, what would it be (there are no restrictions here)?

(Fly to the moon, open a restaurant, write a book?)

What would it take for you to reach one of the above goals?

Are you passionate about an issue or cause?
(Social security, senior citizens, pets, making sure people use excellent résumés?)

What are your natural gifts and talents?
(What just seems to flow naturally?)

On a scale of 1 to 10 (10 being highest), how does your current work express your ingrained giftedness and passion? Explain.

Ponder your childhood and youth/young adulthood. What activities, jobs, and causes brought you the most fulfillment and joy?

Are there limitations to your natural abilities that cause you anguish? What and why?

How can you overcome the limitations that you have noted?

Review the above exercises and note the patterns to the things you love doing and the things you are good at doing naturally. List those items that repeat in the above sections:

What will be your legacy?

What do you want your legacy to be?

Write your retirement announcement:

|| GOAL DEVELOPMENT

"If you can dream it, you can do it." -Walt Disney

Developing goals is critical to career success. Goals provide a springboard from where you can start and end...goals provide a vision and an end in mind. As you attain goals, you can check them off and feel a great sense of accomplishment. You can also create new goals and revise your goals throughout your career.

Certainly, life circumstances can dictate a different path at a certain time. Goals within a mission statement will be revealed and refined over time (as children grow and become independent, for example, allowing more time to pursue varied interests). However, identifying a purpose and fulfilling that purpose often creates contentment in life and career choices.

There are three stages to goal setting:

- 1) Thinking / dreaming
- 2) Putting thoughts to paper
- 3) Taking action

And three keys to success:

- | | |
|------------|--|
| 1) Thought | You have to think first of what you want |
| 2) Word | The thought must become a coherent idea in the form of words |
| 3) Action | What you must do to get what you want |

As you define success for yourself, you will most likely create an answer that focuses on business, family and spiritual matters, or finances, or a combination of the three.

Short-term goals keep you on a tight rope and they need to be more practical goals, which can be obtained within a short period of time. Long-term goals are more visionary, and allow you to see the goal in mind. For example, draw a picture of your short-term and long-term goals, after this exercise is completed.

Using the sample goal form (below), you will see that some of the long-term goals listed on the form include a car and house. This client can draw a car and a house and keep it with his written goal form to encourage him to succeed.

Draw a picture of one of your short-term goals:

Draw a picture of one of your long-term goals:

Draw a picture of one of your dreams/ultimate goals:

What is preventing you from reaching your dream goals?

Have you hired a coach to help you reach your goals? Why or why not?

Achieving the Impossible

Is it possible to achieve the impossible? In other words, is it possible to do something today or in the future that hasn't been done in the past? Of course! We call the process invention, innovation, advancement, and creation. Until 1954, no one had ever run a four-minute mile. Roger Banister's goal was to be the first person in the world to do so, and in 1954, he broke the four-minute mile. But here's the truly miraculous part of the story. After Bannister broke the record, 37 other people broke the four-minute mile barrier in the following 12 months, and more than 300 people broke it the year after that. What was once considered impossible, was made possible by a man who set high goals for himself and amassed a belief system that anything was possible if he was committed to his goals.

Goal setting begins with a strong belief system that anything is possible if you have the courage, commitment, and perseverance to achieve your aspirations.

10 Ideas For Developing and Achieving Your Aspirations

- 1) Set high goals
- 2) Write your goals down on paper
- 3) Pursue your goals with passion
- 4) Prioritize your goals
- 5) Develop powerful action plans to attain goal achievement
- 6) Establish stringent timetables and hold yourself accountable to meet those timetables
- 7) Be flexible and adaptable with your action plans – but never give up on the goal
- 8) Be sure your goals are congruent with your values
- 9) Be sure there is purpose and meaning behind your goals – that you have a burning desire to achieve them (are you motivated to attain your goals?)
- 10) Approach your goals with a positive attitude and with certainty that you will achieve them

Clarity is Power

Clarity is power and you must be clear on what you want and why you want it. If you do not set precise goals based on precise outcomes, with precise timetables, you will fall short of your potential to live the quality of life you are capable of.

Consider these questions as you develop your goals:

- What do you REALLY want to do?
- Who do you REALLY want to become?
- What do you REALLY want to see?
- What do you REALLY want to have?
- Where do you REALLY want to go?
- Whom do you REALLY want to be with?
- What do you REALLY want to learn and earn?

The key to developing goals is to consider the realm of ALL possibilities. In other words, consider everything, regardless of how outrageous and impossible it may seem at the moment. You can always scratch your ideas off the list later. So if you want to become a millionaire, put it on your goals list. If you want a \$50,000 Rolex

watch, write it down. If you want to operate your own business and you're presently broke, put it on your goals list anyway.

If you want to fly your own plane, become a famous interior designer, rock singer, professional football player, disc jockey, or author, write it down. Don't worry about HOW you will accomplish it; just acknowledge it. Allow your heart to explore every possibility that interests or sparks a passion within you. There will be plenty of time later to examine and analyze your goals. Remember what Napoleon Hill said some 70 years ago, "*Whatever the mind can conceive and believe, you can achieve.*"

Sample goals may include:

Relationship goals

(Find my soul mate; get engaged; get married; reaffirm vows, etc.)

Social goals

(Make new friends; join a social club; go out every Saturday, etc.)

Family goals

(Call mom every week; weekend outings once a month, dinner with the family at least four times a week, etc.)

Health goals

(Lose 10 lbs.; eat healthier; hire a nutritionist; exercise daily/weekly, etc.)

Career goals

(Secure a new job; start a business; earn more money, etc.)

Financial goals

(Save money; start a retirement fund; attend a financial seminar, etc.)

Things goals

(Purchase a new car, new watch, jet skis, or boat, etc.)

Adventure goals

(Visit the Grand Canyon; go helicopter skiing; Vacation in Aruba, etc.)

Spirituality goals

(Read the Bible or other spiritual guide daily; go to church/temple weekly; etc.)

Contribution goals

(Volunteer at the lung association; join the PTA; etc.)

Personal development goals

(Read a book a month or return to school for a degree)

Overcoming fear goals

(Jump out of an airplane or hold a snake; mend a broken relationship; seek new employment)

Turnaround goals

(I want to turn around my relationship with my brother, or I want to mend fences with a friend)

Note that some goals cross boundaries and may fall under the heading of two or more goal categories.

So take a moment and jot down some of the categories that are most important to you. If you decide to include all the categories, or even more categories than noted above, that's great!

1)	5)	9)
2)	6)	10)
3)	7)	11)
4)	8)	12)

List all your goals – lifestyle or career:

_____ /

_____ /

_____ /

_____ /

_____ /

Long- or Short-Term Goals?

GREAT! You have now completed writing down all your goals in many varied categories. Some people have put on their goals list writing a book, going back to school, losing weight, quitting smoking, becoming a good public speaker, learning a new language, learning gourmet cooking, or having children. Some people have a goal to own a dog, fly the Concorde to London, spend a week snowboarding in Colorado, contribute to the Special Olympics, or learn to dance.

Some people want to see Cher in concert, travel around the world, or get out of the rat race and start a small farm. Other people want a new home, a new job, a new loving relationship, or more money. And finally, some people want more time to read, study, grow, or to get to know themselves and/or God better.

Review all your goals and when you have them all written down and you feel the list is fairly comprehensive – go back and at the end of each line place an “S” for a goal that you want to achieve in the short-term or put an “L” signifying this is a long term goal.

Prioritize Your Goals

Now that you have identified your long and short-term goals, review all of them and be prepared to put them in order of priority. In other words, identify your 10 most important short-term goals and your 10 most important long-term goals.

In the end, you can't work on hundreds of goals simultaneously, because you don't have the time. You would be significantly diluting the achievement process. However, you could productively pursue and successfully achieve a few goals that you spend the majority of your energy and resources on.

By prioritizing your top 10 short-term goals and 10 long-term goals, you become AWARE, consciously and subconsciously, of what you want to attain in your life. And most importantly, you are committing these goals to paper - and when things are written down, clarity is realized. In other words, when you write down and prioritize your goals, you realize and acknowledge to yourself what it is you want to get from, and give back to life.

Now that you have your list of goals, you can work to identify the most important ones that you would want to invest most of your time and attention to. In the following section, list your top 10 short-term goals and then your top 10 long-term goals (goals that will take longer than one or two years to attain, but are worth planning for and pursuing).

Top 10 Short-term Goals

(One to two years to achieve)

1)

2)

3)

4)

5)

6)

7)

8)

9)

10)

Top 10 Long-term Goals

(More than two years to achieve)

1)

2)

3)

4)

5)

6)

7)

8)

9)

10)

List the Big Three

Review your top 10 short-term goals and imagine what three goals out of these 10 that, if achieved in the next 12 months, would revolutionize your life forever. Allow yourself to “feel” how it would feel to accomplish these three goals.

The Three Most Important Goals I Want to Achieve in the Next 12 months!

1)

2)

3)

Take Action

You have given thought to the goals to which you aspire. You have put them into words by writing them down, prioritizing them, and identifying the three most important goals you want to achieve in the next 24 months. You have inspired yourself with reasons “why” you want to attain the goals and have acknowledged the “consequences” if you fail to realize them. After all this analysis, you have made the commitment to GO FOR IT! Now you need a plan.

For each of your three main goals, write down an action plan on how you will achieve them. What must you do? What are your timetables (include completion dates)? What is your PLAN (put your plan in priority order, i.e., step one, step two, etc.)? How will you accomplish it? Who is involved?

GOAL #3 Action Plan:

|| GOALS (THE SHORT FORM)

Your Definition of Success

2-year Business/Career Goals	5 to 10-year Business/Career Goals
-------------------------------------	---

1.

2.

3.

4.

1.

2.

3.

4.

Lifestyle Goals	Dreams/Ultimate Goals
------------------------	------------------------------

1.

2.

3.

4.

1.

2.

3.

4.

Lifestyle Requirements & Priorities (List lifestyle requirements, then number in order of priority)
--

A. ()

B. ()

C. ()

D. ()

E. ()

F. ()

Script for Success (Accountability and Commitment/What steps do you need to implement to reach your goals?)

Plan

Anticipated Completion Date

1.

2.

3.

4.

5.

Accountability Partner, Coach, or Support/Success Team Members

Name

How can they help specifically with your goals?

1.

2.

3.

4.

5.

Sample Goals From

Your Definition of Success

Success is owning my own business and making an income that supports my family and provides for a new home within 5 years, a Volvo for me, an SUV for my spouse, and a college education for my children.

<p>2-year Business/Career Goals</p> <ol style="list-style-type: none"> 1. Design web site 2. Hire bookkeeper 3. Pay off initial debt to start business 4. Start book manuscript 	<p>5 to 10-year Business/Career Goals</p> <ol style="list-style-type: none"> 1. Move to store front or executive suite 2. Purchase new office equipment 3. Secure investors 4. Hire staff
<p>Lifestyle Goals</p> <ol style="list-style-type: none"> 1. Buy a new home within 5 years 2. Buy a Volvo (pay cash) 3. Buy an SUV (pay cash) 4. Start college funds for children 	<p>Dreams/Ultimate Goals</p> <ol style="list-style-type: none"> 1. Return to school to get Ph.D. 2. Fly to the moon 3. Travel the world on a cruise 4. Live long enough to see my grand-children marry and have kids

Lifestyle Requirements & Priorities (List lifestyle requirements, then number in order of priority)

- A. (1) Me. I need to learn to take care of myself and say no, as I build my business
- B. (3) Time to attend kids' school activities and sporting events
- C. (4) Need to maintain a profit of at least \$35,000 to meet bills and get the business started
- D. (6) Need to join professional associations and check into more education
- E. (2) Find time to date spouse and travel a little

F. (5) Need a new car, soon

Script for Success (Accountability and Commitment/What steps do you need to implement to reach your goals?)

<u>Plan</u>	<u>Anticipated Completion Date</u>
1. Contact web master to design web site	3 months (June)
2. Research bookkeepers and software	5 months (August)
3. Check into buying a used , reliable car, until the cash flow starts	2 months (May)
4. Mark the kids' activities on my calendar and block off the time from work	Now
5. Set up a savings account for the business to work towards paying off business debt and buying a new car and house. Check also about college education savings funds	Next week

Accountability Partner, Coach, or Support/Success Team Members

<u>Name</u>	<u>How can they help specifically with your goals?</u>
1. John	He recommended the web master
2. Susan	Her company does payroll, she may be able to recommend a source for bookkeeping
3. Donald	He knows about buying cars
4. Andrea	She is an accountant...she can advise me for savings
5. Timothy	We jog together three times a week and he will listen to me and call and check up on my goals and commitment dates...he keeps me in line

Values & Motivations

Value places importance and significance. Value carries worth and merits consequences. Something valuable is appreciated, respected, esteemed, and treasured. When we value something (tangible or intangible), we attach great importance to it – we regard it highly.

Motivation inspires and gives purpose to a project, activity or value. Motivation is the stimulus that spurs one on to start and complete something.

List some things that you value.

(Family members, house, car, grandmother's china, sleep, ocean breeze, other)

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____
- 7) _____
- 8) _____
- 9) _____
- 10) _____
- 11) _____
- 12) _____
- 13) _____
- 14) _____

15)

16)

17)

18)

19)

20)

Now, using the above list, place the items in order of priority – which items do you value the most and why?

1)

2)

3)

4)

5)

6)

7)

8)

9)

10)

11)

12)

13)

14)

15)

16)

17)

18)

19)

20)

When you think about your career, what do you value in a position and what motivates you to work well on the job?

(Short commute, lots of challenge, living by the beach, large window office, stable pay check, daily expected routine on the job, telecommuting/create own schedule, authority/executive title, lots of profit and regular raises, recognition, working with friendly colleagues, intellectual challenge, creativity, other?)

1)

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19)

20)

What are the top 5 most important career values you must experience in order to be content in your position?

1)

2)

3)

4)

5)

Company values should support the company mission and connect with your values. Have you ever worked for a company that did not match your value system? What happened?

List career requirements that you DO NOT value.

(These are career requirements that you do not need in a position or with a company to be content – in fact, these items may even make you uncomfortable, i.e., micro-manager boss, fast deadlines, decision-making responsibility, working with others, adventure and risk taking, sitting at desk vs. walking around all day, position with new activities daily, troubleshooting and problems resolution, telecommuting, working for society, competition, public speaking, working with the public, other)

1)

2)

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4)

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20)

As a career coach, make a list of as many career values as you can think of that your clients might bring to the table:

(Use this list to help your clients brainstorm, if they get stuck)

1) _____ 21) _____

2) _____ 22) _____

3) _____ 23) _____

4) _____ 24) _____

5) _____ 25) _____

6) _____ 26) _____

7) _____ 27) _____

8) _____ 28) _____

9) _____ 29) _____

10) _____ 30) _____

11) _____ 31) _____

12) _____ 32) _____

13) _____ 33) _____

14)	34)
15)	35)
16)	36)
17)	37)
18)	38)
19)	39)
20)	40)

Note: A career value for one person may not be a career value for another person, i.e., one client may list telecommuting as her first career value, as she wants to be able to stay home with her children and have flexibility to work at her own pace and schedule. Another client may list telecommuting as something he does not value, as he is not disciplined enough to work from home, and he requires the daily interaction with colleagues to challenge and motivate him to complete his daily work.

Another client may list working with the public as a top career value. This person may be well suited for the retail, banking, or food service industries where there is daily contact with the public.

The next client may indicate that he does not value working with the public. This client may indicate that his personality is not very positive, and he may shy away from constant public contact. He would rather work in a back desk job, with minimal interaction with others.

What is important in these exercises is that the client determines what is truly valuable to him in a specific position. If the client accepts a position that incorporates too many items on the least valued list, he will become burned out and begin to resent the position in a short period of time.

Write the “perfect” position description and employment offer for you:

Let's look at a sample client's career values:

- Commute of less than 30 minutes per day (up to 20 miles in traffic each way)
- Create work schedule to be able to continue college classes...can work Saturdays, but not Thursdays
- Must live by the beach in a sunny climate
- Want a position with upward mobility...want a promotion or raise every year
- Seek position with an office window/don't like cubicles
- Need a stable paycheck
- Like troubleshooting and challenges
- Must be able to make decisions and supervise others
- Want frequent recognition via awards and performance ratings
- Need opportunity to speak often in public or lead staff and other meetings
- Want a job title that includes "executive"

Here is a list of career requirements that the client does not value:

- Telecommuting (I want to be seen daily and know what my staff is doing)
- Nothing artsy – Likes ideas and challenges...not creativity (there is a marketing department for that)
- Don't want to work for a non-profit (want a large salary and I'm not sure a non-profit can provide a large salary. Also, doesn't want to feel guilty about taking a salary)
- Don't want a stable boring job...want a new challenge for every new project
- Don't want to work alone

So, as a coach, let's guide this client through the decision of accepting one of two positions (we are only using basic information about the position and company; this does not include information about the position description, which would create a lengthy discussion/query session):

Position #1:

- Smith Manufacturing, Detroit, MI
- Senior Vice President Operations
- Salary: \$105,000 plus full medical and dental, company car, and laptop
- Annual raise based on merit

-
- Willing to allow work on Saturdays instead of Thursdays for one year – or until education program is completed, whichever comes first. Must carry a cell phone 24/7
 - 2nd floor window office and personal secretary
 - Supervise a direct-report staff of 22 managers supporting 150 laborers
 - Promotion based on retirement of Executive Vice President/Operations Division

Position #2:

- Myers Distribution, West Palm Beach, FL
- Executive Operations Manager of Distribution
- Salary: \$85,000, plus full medical and dental, company car, 401K matched funds at .25 cents to the dollar, and profit sharing after 1 year
- Office in warehouse, no window
- Supervise 5 managers overseeing 75 laborers
- Flexible work schedule...can work Saturdays, and will need to work evenings
- Annual raise based on merit
- Promotion potential to Regional Operations Manager after two years with company

Then a dialogue may ensue with the client. You may ask the following questions to guide your client in making a proper determination for a position and company, based on his values:

- He can elect to accept a position in Michigan or Florida. The position in Michigan has a window office, but not in Florida. So, what do you value more, location or office type/space? Why?
- Neither position has the word executive in the position title? Does that matter?
- Have you compared the benefits packages?
- Can you negotiate more benefits into either offer to sweeten the deal?
- The position in Florida has a smaller starting salary and what appears to be less responsibility; perhaps it is a smaller company. What do you value more, a larger company or more flexibility with a smaller company?

-
- The smaller company has promotion potential within two years. The Company in Michigan appears to have no or little promotion potential. How important is promotion potential to you?
 - If you picked only one thing, between the two offers above, as the number one thing you value in a new position, what is it?
 - What is the number two thing? Let's note where one and two fall on the offers (same or different). If different, then continue with three and four in order of value priority.

The process will allow your client to make an informed decision about which offer to accept or perhaps the answer is to apply to more companies. The client may find that neither position provides enough career values to suit his needs. He may determine, by reviewing his career values, that he really needs to work for a company that meets most or all of his top 10 career values, or he will suffocate.

On the other hand, he may decide that accepting a position near the beach with promotion potential and a decent salary with an excellent benefits package will meet the needs of his career values, and he can still find contentment on the job.

Values Exercise

Top 4 Life Values	Top 4 Career Values
1.	1.
2.	2.
3.	3.
4.	4.

Value Requirements & Priorities (Top 6 values, placed in order of priority)
A. ()
B. ()
C. ()
D. ()
E. ()
F. ()

What things do you NOT value—that will burn you out at work fast?
1.
2.
3.
4.
5.

Values Comparison

Required in My Career

1.

2.

3.

4.

5.

Not Required in My Career

1.

2.

3.

4.

5.

Values Exercise (Sample)

Top 4 Life Values	Top 4 Career Values
1. Live by aging parents	1. Stable income of \$xxx,xxx per year
2. Make sure kids have \$ for college	2. Executive level title with respect
3. Live by ocean at retirement	3. Lots of public contact/public speaking
4. Buy new home in 3 years	4. Some flexibility to help with parents

Value Requirements & Priorities (Top 6 values, placed in order of priority)
A. (1) Stable income of \$xxx,xxx per year
B. (2) Live by aging parents
C. (6) Live by ocean at retirement
D. (5) Lots of public contact/public speaking
E. (3) Some flexibility to help with parents
F. (4) Making sure kids have \$ for college

What things do you NOT value—that will burn you out at work fast?

- 1. Can't just sit at a desk...need lots of public contact**
- 2. Prefer ocean breeze / view / don't like mountains or cold**
- 3. Must have autonomy... can't stand micromanager boss**
- 4. I am not creative ... don't care about arts**
- 5. Don't like a quiet office...need lots of people to supervise and activity to keep challenged**

Values Comparison

Required in My Career

- 1. Decision-making**
- 2. Good salary**
- 3. Some flexibility in schedules**
- 4. Public Contact/Speaking**
- 5. Sunny/warm location**

Not Required in My Career

- 1. Micro-manager boss**
- 2. Can't make less than \$xxx**
- 3. Rigid schedule/boss**
- 4. Sit at desk...boring job**
- 5. Cold climate will kill me**

|| THINK OUTSIDE THE BOX

Don't let this exercise box you in. Rather use this list as a springboard to creative thinking...what other positions and industries can you think of...what other careers that you can think of that spark your interest? Fill in your own boxes:

Professions and Industries

Use this checklist to mark those professions and industries that interest you

(Mark the categories of interest and underline or circle specifics):

Medical & Dental (doctor, nurse, technical, dentist, dental hygienist, medical benefits administration specialist, physical therapist, surgeon, speech therapist, other)	Teacher or Instructor/Academia (elementary, pre-k, college, librarian, research science, professor, administrator, other)	Executive (for profit, non-profit, community, government agency, business manager, other)
Finance (accountant, bookkeeper, financial planner, banker, tax expert, credit manager, investment broker, insurance sales, other)	Food Service (restaurant management, meat packing, distribution, sales, other)	Engineering (civil, facilities, electrical, other)
Construction (homes, commercial structures, contracting, architect, plumber, electrical)	IT (hardware development, software development, programmer, database administrator, help desk, other)	Science (biologist, NBC-nuclear, biological and chemical specialist, astronomer, archeologist, researcher, chemical technician, other)
Veterinary Science (epidemiologist, zoo worker, dolphin trainer, professor, veterinarian, other)	Security (security guard, security management, personnel security services, detective, physical/industrial, other)	Intelligence (anti-terrorism and force protection, other)
Police Work (police, administrator, investigator, other)	Fire and Emergency (fireman, city government, ambulance driver, ENT, forest	Non-profit (administration, volunteer, management, trainer, consultant, other)

	ranger, other)	
Retail (management, distribution, product development, sales, other)	Sales and Marketing (pharmaceuticals, products, retail, other)	Business Development (international business development, trade/import/export, operations, other)
Public Works (electricity, water, garbage, management, administration, other)	Child Care (home child care, daycare/pre-school management or worker, other)	Telecommunications (management, sales, specialist, other)
Video communications (cable installer, IT specialist, help desk, other)	Military Contractor (varied, i.e., logistics, communications, engineering, management, trainer, range control, bio chemical expert, other)	Transportation (truck driver, HAZMAT, trainer, taxi, other)
Logistics (trucking, moving, distribution, operations, other)	Counseling (minister, therapist, career coach, other)	Holistic Medicine (acupuncture, massage, herbalist, chiropractor, other)
Venture Capitalist (franchise owner, developer, investor, other)	Project Management (any industry – project leader, subject matter expert, consultant, team member, other)	Hotel (developer, owner, manager, housekeeping, bed and breakfast, other)
Entertainment (amusement parks, movies, TV, concert management, acting, other)	Real Estate (agent, developer, broker, other)	Human Resources (personnel specialist, recruiter, union management and negotiations, career coach, résumé writer, trainer; state, university, unemployment, other)
Social Work (adoptions, social security, WICK, hospital, new mothers, abuse, other)	Manufacturing (products, management, laborer, other)	Artist (painter, illustrator, woodworker, furniture designer, interior decorator, other)
Law (lawyer, court reporter, public defender, researcher, librarian, other)	Writer/Communications (journalist, résumé writer, photographer, TV broadcaster, public	Sports (athlete, coach, manager, recreation/youth coach, other)

	relations, public affairs, other)	
Mechanics (cars, machinery /refrigerators repair / sales, other)	Fashion (model, designer, sales associate)	Politics (school board, state or federal government, congress, senate, other)
Farming (farmer, fish and game warden, rancher, other)	Travel (pilot, airport security, airport management, travel agent, cruise line management, other)	Other

From the above list and what you have added in "other," list the top five professions that interest you:

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____

List the top three job titles you would like to have:

- 1) _____
- 2) _____
- 3) _____

Match the position titles with the industries:

- 1) _____
- 2) _____
- 3) _____

What will it take for you to become a (position title) in (industry)?

(Hint: more training or education, a certification, a promotion, a complete career change?)

1)

2)

3)

4)

5)

6)

Are your selections viable? Why or why not? How long will it take for them to become attainable?

1)

2)

3)

4)

5)

6)

|| ASSESSMENT TESTING

The exercises throughout the CPCC program will help you get to know your clients in a subjective (informal) manner. You will guide your clients in forming responses that will ultimately help them navigate a complete career path and discovery phase.

You may also elect to employ the use of objective (formal) assessment testing. Some types of assessment instruments are only issued and scored by a trained, certified, or licensed practitioner.

Other assessment instruments can be issued by you, completed online or via hard copy by your client, and sent to you for review.

In the event that you prefer a certain assessment instrument and you are not certified in the instrument, you may want to partner with a colleague who can administer the assessment instrument and provide the results to you (the coach), or sometimes the counselor can deliver the results to the coach and client in a three-way phone conversation.

For information on competency requirements to administer assessments, contact the American Counseling Association at www.aca.org or the National Career Development Association at www.ncda.org.

Results of assessment instruments reveal client insights, helping to understand the client's values, motivations, skills, personality, interests, and requirements.

There are dozens of assessment instruments available in the marketplace. Your clients may benefit from one or a variety of assessment instruments including Personality; Career Interests, Values, Motivations, and Skills; Aptitude; Intelligence; Behavior, and others. Some score using colors as the basis of the assessment. Some clients are quite interested in assessment testing and the results; others are less interested. Either way, it provides the career coach with a base line of the client, to guide in discussions and résumé development.

Sample Assessments

I recommend that you try several assessments and determine which one you like the best, and which one provides the information that best helps you and your clients in the career search process. Take the tests for yourself and start a file. This process accomplishes two things: You get to know yourself better, and you will determine a viable assessment for your clients.

- **DISC Behavioral Profile:** The DISC is a behavioral assessment designed to measure accurately the four dimensions of normal behavior. Its validity has been scientifically tested. The assessment provides a report with insights and information on specific graphs. *DISC stands for Dominance, Influence, Steadiness, and Compliance.* You can access the online assessment at www.profilingpro.com.
- **Myers-Briggs Type Indicator (MBTI):** The MBTI must be administered by a certified practitioner, and is the most widely used personality assessment tool on the market. It provides 16 personality types. If you like the MBTI and you are not certified, then you can elect to either become certified or partner with another career coach who is certified. You can find the MBTI at <http://www.cpp.com/Products/index.asp>
- **Strong Interest Inventory:** You can also find the Strong Interest Inventory at <http://www.cpp.com/Products/index.asp>. The Strong Interest Inventory is a career management tool.
- **The Keirsey Temperament Sorter:** The Keirsey Temperament Sorter – does not require certifications to administer, is reasonably priced, and you can receive the assessment to your computer at the completion of the test to review with your client. It is accessible online at www.advisorteam.com.
- **The Self-Directed Search:** The Self Directed Search at www.self-directed-search.com, is a career-oriented assessment of career inventories. People are categorized into six types: Realistic, Investigative, Artistic, Social, Enterprising, and Conventional. The Self Directed Search is intended to provide candidates with information about themselves and how their individual skills and interests are related to their career choices.
- **The Page Work Behavior Inventory (PWBI)** is a state-of-the-art tool that assesses the work styles of job applicants and employees. It gives you the capability to objectively assess people and match them to jobs. It is used for all types of employees, including Executives, Managers, Professionals & Administrative Staff, Administrative Support, and Labor & Production Staff.

http://www.aai-assessment.com/products/page_work_behavior_inventory/

- The Work Behavior Inventory identifies preferred work styles and the styles match the work styles in the O*NET Online summary reports for occupations. It assesses leadership style, influencing style, and emotional intelligence. www.hrconsultantsinc.com
- True Colors at www.truecolors.com is a free personality quiz that describes values, natural gifts, talents, and career choices.
- The Department of Labor offers a free assessment at www.onetcenter.org/tools.html.
- *StrengthsFinder 2.0*. This is a tool to help people uncover their talents and strengths, and focus on strengths, as opposed to fixing weaknesses. Gallup unveiled the *new and improved* version of its popular assessment, language of 34 themes, and much more. <http://strengths.gallup.com/110440/About-StrengthsFinder-2.aspx>
- Knowdell Motivated Skills Card Sort: www.16Types.com and <http://www.careertrainer.com/trainingsys/motivated-skills-card-sort-knowdell-cards-ff80818123929f4201241738187e6736-p.html> (for tools). Identify motivational factors, occupational interests, and even retirement options.
- O*NET® Online Skills Search www.online.onetcenter.org/skills. The report provides occupations that correspond to skills by degree of match.
- Career Liftoff® Interest Inventory generates information on six occupational themes and 30 career fields. www.careerliftoff.com

360 Degree Assessments

360° feedback finds its root in the idea of a compass – a full circle – with 360 points of reference to determine direction. The 360° feedback instrument provides a full spectrum of information about a person or company, obtaining data from multiple points of reference. It is a navigational tool to tell a person or organization when they are on or off track.

The 360° feedback instruments ask for data from colleagues, peers, managers, subordinates, and customers. The data is compiled into a report and read by the needed party. 360° feedback instruments focus on performance improvement, but also provide insight into personality, strengths, and weaknesses of the intended

subject or individual. The results are provided anonymously, so the reader cannot earmark certain responses from specific people.

People who use the 360° feedback instruments to improve their personal performance, need a thick skin to review the results. They must be willing to review, absorb, and incorporate the comments/results without becoming emotional or hurt. The purpose of the assessment is to provide viable, concise, and very detailed feedback to help the individual improve work performance, specific skills, or boost personal needs.

If one of your clients is struggling in a current position, he may benefit from a 360° instrument to help you, the Career Coach, pinpoint the troubled areas, and move forward to build a plan to help the client improve performance or strengthen skill sets.

You can access a 360° instrument at www.reachcc.com.

Personality

What makes your clients tick? Understanding their basic personality aids in “listening” better and posing better – more targeted questions – questions with understanding.

The four main personality types

- **Choleric (Powerful and controlling)**
- **Sanguine (Popular and fun-loving)**
- **Melancholy (Perfect and orderly)**
- **Phlegmatic (Peaceful and easy going)**

Let’s review some characteristics about personality types and see if you can classify yourself, your spouse, your children, parents, coworkers, or neighbors:

Sanguines are risk-takers, group-oriented, motivators, fun loving, and very verbal. They enjoy change, avoid details, are visionary, adventurous, eager, bold, physical, and energetic. They like variety, are promoters, creative, mix easily, and are optimistic – “trust me it will work out,” they say. They can get bored easily and

often they are talking to you and looking at the next person ready to pass by. They enjoy parties.

They value skill, resourcefulness, and courage. They are performers and competitors. They like excitement and stimulation. They like giving extravagant gifts.

As children they have trouble fitting into an academic routine – they learn by doing and experiencing – they need physical involvement. They just want to have fun.

Weaknesses include being brassy, undisciplined, forgetful, interrupting, unpredictable, permissive, wanting credit, too talkative, disorganized, loud, show-off, restless, and scatterbrained.

Cholerics take charge, are assertive, bold, enterprising, decision makers, goal driven, and enjoy challenges. They are determined, firm, purposeful, competitive, leaders, self-reliant, analytical, global, conceptual, cool, calm, collected, intelligent, abstract, hypothetical, investigative, and problem solvers – they are drawn to constant challenge careers.

They like to develop models, explore ideas, and often think work is more important than play. They like explanations and answers. The head rules the heart. They need

to learn that people are more important than projects and they need to increase the level of communication in the home.

As a child they appear older than their years, focused on greatest interests, and they achieve in subjects that are mentally interesting. They are impatient with drill and routine, they question authority. Child choleric allow their parents to live in the house.

Weaknesses include being bossy, unsympathetic, frank, impatient, unaffectionate, headstrong, argumentative, and nervy. They can be workaholics, tactless, intolerant, manipulative, stubborn, short tempered, rash, and lording over others. They say, "let's do it now."

The Melancholy is deliberate, reserved, practical, factual, detailed, inquisitive, persistent, controlled, predictable, orderly, discerning, analytical, precise, and scheduled. They are enthusiastic, sympathetic, and personal. They look for meaning and significance in life – they are warm, communicative, compassionate, idealistic, spiritual, sincere, and they like to contribute, encourage and care for others/relationships. They value integrity and unity in relationships.

They are peaceful, flexible, and imaginative. They have a desire to influence others, so they may live more significant lives. They read instruction books, they are persistent, and they need times of quiet – no TV or radio.

As a child they are extremely imaginative and find it difficult to fit into the structure of school life – they are very sensitive to rejection and they seek recognition. They respond to encouragement rather than to competition.

Weaknesses include being bashful, unforgiving, resentful, fussy, insecure, unpopular, hard to please, alienated, a negative attitude, withdrawn, depressed; being an introvert, loner, skeptical, suspicious, critical, or revengeful. They say, "How was it done in the past?"

The Phlegmatic is loyal, even keeled, enjoys routine, is a good listener, sympathetic, nurturing, tolerant, non-demanding, avoids conflict, dislikes change, adaptable, is thoughtful, patient, and has deep relationships. They are loyal, dependable, prepared, have a strong sense of what is right and what is wrong, thorough, sensible, punctual. "I need to be useful and belong," they say. They are faithful, stable, organized, caring, concerned, and concrete. They value home, family, and tradition; they are natural preservers, parents, and helpers. They can

withstand great pain and emotional distress. They are strained by uncommunicative households. They need to learn to say no.

At work they provide stability and maintain organization, handle details and work hard. Work comes before play. They are serious with traditional views of marriage and love.

As a child, they want to follow rules and regulations, respect authority, and are comfortable with an academic routine.

Weaknesses include being blank, unenthusiastic, reticent, fearful, indecisive, uninvolved, plain, aimless, worried, timid, doubtful, slow, lazy, or sluggish. They say, "Let's keep things the way they are."

Of course, you may see yourself falling into more than one category, but overall most people fall into to one category, and that really does determine their bent from birth to death. Talking to teachers, parents, friends, colleagues, or bosses will also help you to discover the type of personality your children or family members have. Noting personality types and working with those types rather than trying to change the differences, will cause the personality to flourish and a spirit to soar – we can't all be like us.

Identifying Your Personality Type

Personality Evaluation (Rank them 1, 2, 3, 4)

Producer ()	Expresser ()	Analytical ()	Congenial ()
(Task oriented)	(Communications oriented)	(Thought oriented)	(Emotions oriented)
(Choleric)	(Sanguine)	(Melancholy)	(Phlegmatic)

General Profile

- | | | | |
|---|--|--|--|
| <ul style="list-style-type: none">• Productive• Authority• Thrives w/ Stress• Inventive• Achiever• Alter/Control Environment• Self-Assured and Driven• Insensitivity Tendencies• Wants Results Now• Future/Present• Extrovert | <ul style="list-style-type: none">• Loves People• Sensitive• Escapes Stress• Creative• Seeks to Influence• Explore Environment• Sell Others on Their Ideas• Sensitivity Tendencies• People Come First• Present/Future• Extrovert | <ul style="list-style-type: none">• Quality• Security• Withdraws from Stress• Avoids Errors• Highly Structured• Adapt to Environment• Avoid Emotional Intensity• Insensitivity Tendencies• Follows Directions to a "T"• Past/Future• Introvert | <ul style="list-style-type: none">• Happy• Reliable• Adjusts to Stress• Common Sense• Balanced• Adapts to Situation• No Confrontation• Rather Sensitive• Seeks Solutions• Present• Introvert |
|---|--|--|--|

Common Challenges

- | | | | |
|---|---|--|--|
| <ul style="list-style-type: none">• Dogmatic• Impatient• Insensitive• Lonely• Burnout - Fatigue | <ul style="list-style-type: none">• Emotional• Over-indulge• Poor Time Management• Too Talkative• Arrogant/Self Assured | <ul style="list-style-type: none">• Insensitive• No Risk Taking• Finicky• Lonely/Self Sufficient• Bogged Down in Details | <ul style="list-style-type: none">• Dependent• Too Easy-going• Low Self-esteem• Taken Advantage• Unappreciated |
|---|---|--|--|

|| CLIENT SCENARIOS

“Chaos is where great dreams begin. Before a great vision can become reality, there may be difficulty. Before a person begins a great endeavor, they may encounter chaos. As a new plant breaks the ground with great difficulty, foreshadowing the huge tree, so must we push against difficulty in bringing forth our dreams. Out of chaos, brilliant stars are born.” I-Ching Hexagram # 3

Career coaches facilitate clients through various scenarios: career choices, career change, preparation for a new career/profession, or guide them in advancement opportunities. We work with clients through change – often not of their own choice or will, which can make them fearful, apprehensive, or unsure of their current or future career situation. Anytime a person leaves an employer – and a paycheck – there is apprehension. There are never any guarantees with employment.

Seeking employment and creating a career is like using a Geo-Positional System (GPS) map. We all ultimately want to find our way and arrive at the destination. Some client scenarios follow the bumpy road around windy mountain paths with narrow highways and steep cliffs – not in a straight line. The bumpy employment path causes some challenge in creating résumés and cover letters, which can raise red flags with recruiters, due to multiple positions or gaps in dates, for example.

Others seem to cruise along the autobahn across open roads without much traffic or interference – they seem to have a nice neat path and set destination. The straight path also allows for the creation of easy-to-design résumés usually not raising red flags with recruiters.

Employed coaching clients often fall into basic categories:

1) The employee loves what he/she does and the compensation potential is attractive.

This formula promotes high motivation, satisfaction, contentment, and eventual greatness or success as the client moves forward to meet goals. This type of client may seek new and greater challenges, i.e., he may need to learn to negotiate a promotion or find an excellent recruiter to facilitate moving to a different company. This client works with a goal plan and sets out to meet his goals.

Coaching goals may include

- Negotiating a raise or promotion

-
- Designing a new career path (i.e., new degree and change of industries)
 - Seeking a position on a committee or association
 - Seeking a promotion via employment with a new employer (utilizing a recruiter or confidential career search strategy)
 - Develop new skill sets: Learn how to be a better leader, manager or supervisor, regulate time management requirements and schedules, build teams, set priorities, listen, delegate, develop written and/or verbal communications, something specific like personal education or process management, or become an entrepreneur starting with a business plan

These clients are usually committed to pursuing their goals and are self-motivated as they seek new opportunities. They will benefit from accountability checks and strong questions that make them think and formulate decisions that impact their career futures.

2) The employee does not love what he/she does but continues because the compensation is attractive.

This formula leads to eventual stagnation – a sense of being trapped and unsuccessful. This scenario causes burnout, frustration, and an unmet need to succeed. This may happen to clients who are laid-off and need to find a job to make ends meet. Sometimes, this person becomes stuck in a career path they did not choose, i.e., their parents suggested they pursue a certain career path or they took a summer college job that lasted for 10 plus years.

Coaching goals become more complicated with this scenario. The client may need to maintain a certain level of income, while changing industries or changing positions. Their career interests may be very different from their current position/industry, i.e., IT professional wants to be an HR specialist. The coach and client can explore new career fields and interests via Internet research and Professional Career Development interviews. The client may want to start night classes to obtain a degree and/or seek out a mentor and support team to facilitate learning in a new career field. Once the client determines a career field and industry, then the coaching process moves into the career search campaign phase.

As this type of client takes charge of his/her career path, they can regain some lost confidence and feel more fulfilled.

3) The employee loves what he/she does and continues despite low compensation.

This scenario may breed discouragement, frustration, and complacency. This person feels underappreciated. This client will most likely benefit from seeking employment with adequate compensation and benefits, which are strong motivators.

In this scenario, the client and career coach can design a career search strategy and launch a full career search campaign to seek new employment in a similar industry. The coach can encourage the client to conduct research in the client's chosen profession and even consider a relocation to improve income opportunities.

This client may need coaching in interview strategies and salary and benefit negotiations, to boost confidence and encourage morale during the process.

4) The employee does not love what he/she does and does not have a path to attractive compensation.

This client has no motivation, no sense of greatness, and no long-term value to an employer. This is of course the worst scenario; this client needs to conduct research and move into a career path that brings joy as well as an accommodating salary.

This is definitely a challenging scenario for the career coach and the client. The client needs to build motivation and self-confidence as he determines a career focus and industry, while learning techniques to be a better-than-satisfactory performer on the job.

If this type of client has suffered in a position for any length of time, he may not even receive a quality reference or he may get fired, due to lack of motivation or poor performance.

5) The employee loves what he/she does and loves the compensation, but is pulled down by a poor quality of life, i.e., too much commuting, long hours, or stressful position.

This scenario may cause burnout and frustration. This client may need to make some tough decisions about how to change the quality of life, which may include seeking new employment, relocating, or speaking with management to make changes at the current position.

The coach and client can work together to determine the best path for the client to undertake and maintain his success, salary, and improve the quality of his life. If the commute is frustrating for the client, perhaps he could look into a car pool or company van.

If the work hours are too long, perhaps the coach can work with the client on time management techniques, or develop specific strategies and dialogues to speak with current management to make changes on the job.

The goal of a career coach is to lead clients to scenario (1), so that they are working in a profession they love and they are receiving complimentary compensation, which compels them to seek more challenges and live a basically content life.

Clients enter career-coaching sessions with a mystery bag of emotions, fears, upsets, frustration, financial requirements, excitements, challenges, and other “issues.” Each meeting with a client can easily stray from the intended topic as the coach learns about new issues impacting the client’s career or career goals.

When career seekers have lost direction, as coaches we can offer them a Geo-Positional System to lead them in pinpointing the right direction and seeking a satisfying career destination.

Of, course, when you reach your destination, where do you go from there...?