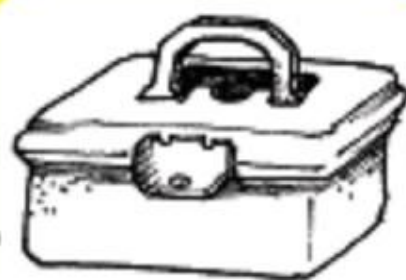


THE ONE TO ONE TOOLKIT

Second Edition

Tips and strategies for advisers,
coaches and mentors



JULIE COOPER & ANN REYNOLDS

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PART 1

THE BASIC ADVICE INTERVIEW

What makes an interview effective? If we can answer this, we are well on the way to being able to assess and improve our own practice. In 2004, researchers studied 50 guidance interviews. They asked clients, advisers and an expert witness to rate how effective the interviews were, and identified what actually takes place in guidance interviews evaluated as effective (Bimrose, Barnes, Hughes and Orton, 2004). They found that the best interviews incorporate four main activities (incorporating ten sub categories), paraphrased below:-

Building a working alliance

- Scene setting
- Rapport building

Exploring potential

- Gathering information
 - a. Hard factual data
 - b. Soft data - feelings, motivations, etc

Identifying options and strategies

- Giving information to clients
- Giving advice – making suggestions
- Giving guidance and using counselling skills to bring about change in thinking or behaviour

Ending and follow through

- Identifying goals
- Identifying action needed to achieve the goals
- Final summary, usually combined with writing an action plan
- Follow-through – referral, enabling, advocacy, follow-up

In an earlier piece of research, a member of the then Department of Employment's Careers Service Inspectorate studied a large number of careers interviews carried out in secondary schools. From this, he drew conclusions about what made the difference between a successful advice interview and a less effective one. He identified seven activities that the adviser needed to do (Bedford, 1982).

While the 2004 research looks at three levels of helping: (Information, Advice and Guidance), Bedford's interview model focuses more on providing information. His model is very similar to the later one in its early stages, but in focusing on providing information rather than in-depth guidance, it seems more relevant to people offering information and advice. For this reason, we offer you Bedford's model here, and explore the full guidance interview in the next section.

Bedford's seven activities are presented here in a list, and generally we would expect them to occur in this order. However, we would never insist on a rigid structure, so that you have the flexibility to decide when it is appropriate to introduce a topic. Also, there are a number of the activities that either should be happening throughout the interview or re-occurring at various stages in the interview.

Two of the seven activities were identified as key for an interview to be useful for the client:



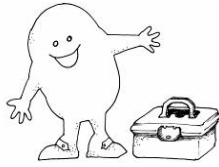
creating a friendly, encouraging atmosphere

and



identifying client's needs accurately

Structuring Your Interview: Bedford's 7 Essentials



1. Create a friendly, encouraging atmosphere



2. Establish the broad purpose of the interview



3. Gather information from the client



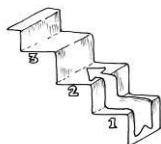
4. Identify the client's needs



5. Give information to the client



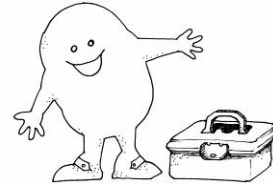
6. Summarise progress made during interview



7. Clarify the next steps to be taken

1. Create a friendly, encouraging atmosphere

WHY?
What does this mean?



Would you like to be advised by someone who scared you? Or who disapproved of you? Would you open up and tell them your real hopes, fears, uncertainties?

Creating a friendly, encouraging atmosphere was one of the activities Bedford found to be a key factor if young people were to view their careers interviews as helpful.

The work of Carl Rogers reinforces this. He was a psychotherapist working in the USA in the mid 20th Century. He revolutionised attitudes with his philosophy of person-centred counselling, believing that the quality of the relationship between client and helper was more important than the skill and knowledge of the helper in enabling the client to make progress. He asks us not to hide behind the mask of professionalism, but to engage with the clients as ourselves, to build a natural, genuinely empathic relationship with them (Rogers, 1967).

In order to create this high quality relationship, he believed a helper should be able to feel and demonstrate three things if the client is to feel comfortable, relaxed and safe enough to benefit:

- 1. Empathic Understanding**
- 2. Unconditional Positive Regard**
- 3. Congruence**

These are not easy concepts on first reading – we will explain!

1. Understanding or Empathy

Who would we choose to discuss our questions and worries with? Probably not someone who would say “Don’t worry, you’ll be OK”. We’d prefer someone who shows they can see why we are worried - even if the same thing would not concern them. We want them to understand not just the facts, but also our feelings. We need them to show in some way that they have understood, not just by saying “I understand” but proving it by the way they respond.

Ways to show empathy include: reflecting back a summary, eg:

- You are afraid you'll lose your friends if you go away to college
- You feel a bit of a failure having to ask for advice?
- You are afraid of the treatment and you hate not knowing what to expect

It is not always necessary to explain why we think they are feeling afraid or angry or sad; in fact we should be very tentative about interpreting the client’s feelings, if possible letting them expand in their own words, for example:

- It seems that upset you quite a lot....
- It’s frustrating...
- The way you said that, you seem pretty angry

We don’t even have to say anything: we can show empathy non-verbally with facial expressions and movements that aim to reflect what the other person is feeling, for example a gentle nod, a sympathetic frown, a sigh or a wry smile.

2. Acceptance and Liking or Unconditional Positive Regard

When we ask for help, we do not want to feel judged or disapproved of. We want the helper to feel positive towards us, even if we have made mistakes or done things we are not proud of. Key phrases are **non-judgemental**, **respect** and **prizing**. This acceptance needs to be **unconditional**, meaning that we can still value a person even if they have done or said things that we cannot agree with.

Of course this is very hard (impossible?) to do in all situations, but the aim is to see the **person** as separate from the **deeds**. If we have made mistakes in our own lives, we would want our helper to be non-judgemental, and see the person underneath. There will be times when a person has done certain things or is expressing certain view which make it impossible for us to feel positive towards them. In such cases we need to recognise this and consider referring them to another helper or agency, rather than try to continue working with them, since we are also aiming to show...

3. Being Genuine or Congruence

Have you ever felt that although someone said they liked you or agreed with you, you could not believe them?

- Oh poor you, it must be awful for you
- Yeah?
- Amazing

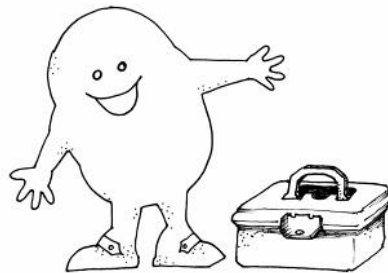
I can tell whether you mean it when you respond to something I'm telling you, just as I can tell you've probably lost interest when your eyes wander to the other side of the room or you starting shifting around in your seat.

As an adviser, I may like to think that in situations where I cannot empathise with a client or feel positive towards them, I can be professional and act as though I do. But the client will know: our non verbal communication or body language will almost always reveal our true feelings. Research has shown that when there is conflict between our words ("It's good to see you...") and our body language (scowl, no eye contact), it is the body language that will be believed (see Part 3 - The Toolkit – First Impressions).

It is important to remember that words, voice and appearance need to send the same message - which is what being congruent means. If we do not do this, the recipient will either be confused or draw wrong conclusions. In order to demonstrate empathy and unconditional positive regard, we have to really feel them.

First Impressions Last

There is a generally accepted view, in the study of communication, that when people meet for the first time, their first impression (in the first few moments) has the most impact and colours their view of everything that happens afterwards. If we accept this to be true, it is clear that our feelings and attitudes towards the client are the first things we need to work on. This will include not only their perception of you, but also the organisation you work for and the quality of the service you provide.



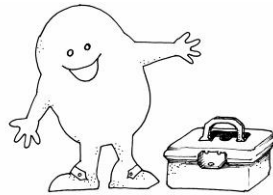


LACK OF SELF AWARENESS

Here's a true story. A woman went to her local Jobcentre. She was a single parent, and as her youngest child had reached sixteen, she was required to make herself available for work. As you can imagine, she was very nervous, as she had never been to a Jobcentre before, and had not worked for many years. The Adviser was word perfect in taking her through the forms and procedures that needed to be completed. Half way through, the woman burst into tears and fled. The Adviser turned to a colleague: "What did I say?"

The Adviser had **said** nothing wrong – but she was completely oblivious to her tone and manner. She had fired questions as if they were coming from a machine gun, her tone of voice was harsh, her facial expression was as hard as rock, showing no understanding or compassion. The moral of the story is this: we need to be aware how our personal style – voice, body language, appearance, impacts on our clients. It is not easy to get an honest appraisal of the impact we make, but we need it if we are to reflect on our practice.

How to Create a Friendly, Encouraging Atmosphere



Publicity

You can begin to create the right environment even before the client meets you. The way you advertise your service in a leaflet, on a website, on a poster, can make clients expect to feel comfortable with you. You can use photographs and language, even accent, to make a diverse range of your whole potential client group feel they will be equally welcome. You can go to where clients are to advertise your service, rather than wait for them to find you. For clients likely to lack confidence, you can build a relationship first with those who already work with them (community workers, health visitors...). Sometimes, you can introduce yourself to clients in a group setting, so they can take a look at you in the safe anonymity of the group before meeting you face to face. Group introductions are often possible in school or college settings, or at the workplace during redundancy programmes.

Physical surroundings

Here are some things to consider. You may be in a position to influence the surroundings in which you meet clients. If you can't influence your surroundings, you can be aware of how they might affect the client and take extra trouble to make him feel at ease and welcome.

- Finding the way. Have clients been given clear instructions, can they park easily, are the bus stops close by, are you well signposted?
- Feeling at Home? Clients may lack confidence, and will be most comfortable in surroundings that feel familiar. This means different clients will feel most comfortable in different surroundings.

- Smart or Informal? All clients will probably feel most comfortable in surroundings that are clean, safe and healthy. However some may feel uncomfortable in a very smart, businesslike environment. If they are coming in with children, they may prefer it a bit lived in so that they won't be embarrassed if their children make a mess.
- Quiet or Bustling? Some clients will prefer quiet surroundings, others will be more comfortable if music is playing, or there is the sound of chatter and other people around. Some like being in a private area, others would feel threatened by this.
- Pictures and other images can make a client feel welcome and can stimulate their interests and inform them. However, be aware of any pictures and posters that could convey hostile messages to clients. Take a look at your surroundings with fresh eyes.
- Sit or stand? Some clients like to sit down (easy chairs or higher chairs round a table?) while others might feel this requires too much commitment from them, and they want to feel they can get away quickly after they have asked their question. Any interaction lasting more than a few minutes is likely to be more relaxed if you are both sitting down, preferably on the same type of chairs, certainly chairs that have you both at the same height. People often feel there should not be a desk between you and the client; if a desk or table will be needed, it is often more friendly to sit side by side or at right angles to the client. Sometimes clients may feel too exposed if there is not a table in front of them, and they will not want to sit too close to you. You need to be aware of different needs for personal space (and indeed eye contact) in different cultures.
- Physical disability. Clients with mobility difficulties, eg: wheelchair users or those on sticks or crutches, will feel most comfortable if they can enter easily, preferably without having to ask for help. Clients with painful backs or joints may be more comfortable sitting in higher chairs, perhaps with arms.
- Children. Some clients can't attend without their children. You may have access to a crèche, or you may provide a toy box to keep the children amused for a while.

- Privacy. Most people will not want others to overhear their questions and concerns. They may simply be embarrassed but they may also have sensitive issues to tell you about. How public is the area where you see clients? On the other hand, some clients may feel anxious or vulnerable if you take them off into a private room too soon.

Body Language

Before you even start speaking with a client, your body language will (or will not) be conveying empathy and unconditional positive regard. Some basic courtesies are:

- Look up immediately as the client approaches (stopping other conversation or activity), make eye contact and smile
- Open posture, facing client
- Relaxed, calm movements
- Non-verbal or minimal encouragers (nod, smile, “Right”, “OK”, “Mmm”, “I see”, “Yes?”)

Never mind the body language, just fix the feelings!

Rather than worry too much about body language, if you feel interest and unconditional positive regard for the client, it will show (and the reverse will show too). This is why Carl Rogers says helpers need to be genuine (Rogers, 1967). Are you thinking:

- How nice to see you, I am going to enjoy answering your questions and working with you
- or*
- Oh no, not another one, I’m too busy
- or*
- I don’t like the look of him, he’s going to be trouble?

Whichever you are thinking, your body language will show it.

How to fix our Feelings

Remembering Rogers' three necessary conditions of Congruence, Unconditional Positive Regard and Empathic Understanding, we need to make sure our mindset is client-centred before we engage with a client. We may need to take a few moments to reflect, to think about how we feel, prepare to focus on them and their needs, even if they reveal aspects of themselves we find distasteful.

The Greeting

Different clients will feel comfortable with different approaches. You can decide which is more appropriate for each client:

- To shake hands *or* not to shake hands?
- “Good Morning” or “Hello” or “All right mate?” *or* “Hiya”?
- Polite and businesslike *or* gentle and warm *or* lively and fun?

A client-centred adviser will not say “I always shake hands” or “I always say Good Morning”; they will make judgements about whether each client they see is likely to be comfortable with a handshake, being offered tea/coffee, etc. They are flexible enough to adapt their welcome to each one.

It's OK to be yourself. Being genuine, you cannot be expected to turn into someone you clearly are not. You are simply remaining aware of how you can best create a friendly, encouraging atmosphere for each individual client.

General chat will give the client time to relax and get their bearings. You will decide which would be appropriate depending on the person and the situation, for example:-

- A question (about their journey, about the weather)
- A remark (the weather, the surroundings, noises)
- An apology (the delay, noises, the surroundings)
- A compliment (their baby, their hair, their bike, their efficiency)

But...be careful with compliments – they need to be appropriate and genuine – it is very easy for a compliment to sound false or patronising, or just too familiar and personal.

All this is designed to make the client feel comfortable, and remember that however they present themselves, they are likely to be lacking in confidence, in a new place, probably in a situation they are not happy with. See in Part 3 The Toolkit - Build them up Buttercup.

Throughout the interview

Although the friendly, encouraging atmosphere has to be created from the start, of course it needs to be maintained throughout the interview. The way you respond to what the client says needs to show that you respect them as an equal, that they have your full attention, that you want to understand them, and that you respect their right to decide whether or not to act upon your advice.

Sometimes it's Hard to Create a Friendly, Encouraging Atmosphere

It can be hard...

- **..to maintain the balance** between being friendly and getting the job done; between the person and the task; between the feelings and the facts. People tend to fall into one of two types: those whose natural tendency is to focus on people and feelings or those who tend to focus on the task and the facts. A focus on feelings is needed to help your clients feel comfortable and a focus on the task is needed for them to get what they came for. The model presented by the 2004 research into successful interviews (Bimrose et al., 2004) tells us we need to gather two types of information from the client: 1 - Hard factual data (achievements, skills, career history) and 2 - Soft data (feelings, motivations, preferences, awareness, interests).

As an adviser, each of us needs to recognise whether we are best at facts or feelings, and remember not to neglect the one that comes less naturally to us. Are YOU more comfortable talking about facts or about feelings? If you are not sure what this means, psychometric instruments such as Cattell's 16PF or

Myers-Briggs Type Indicator, or other personality questionnaires such as those based on Holland's career types or Belbin's team roles are one way to explore your own preferences and personal style (see Part 3 The Toolkit – One Size Fits All?)

- **..to feel empathy and unconditional positive** regard for some people, especially if they are unpleasant to us, or if they annoy us in some way. Carl Rogers himself admitted it was hard! We need to be both honest and assertive: honest to recognise our own feelings and work at seeing things from the client's point of view; assertive to believe that in this equal relationship we are trying to build with the client, we also deserve respect and fair treatment.

We can establish boundaries with the client as to what is acceptable behaviour and the amount of effort they have to put into getting what they want. The next activity "Contracting" provides a time when you can start to establish boundaries. This should be done partly at the start of the meeting (or even beforehand in your publicity material) and then at any point when you feel the interaction is going in a direction that is not desirable.

Examples of re-visiting boundaries part way through an interaction are:

- You remember when we started working together, you agreed that the guidance would only work for you if we both work together, and treat each other with respect? By missing appointments and not letting me know, I feel you are not treating me fairly.
- From the way you are sitting, not looking at me and not saying much, I get the feeling you are angry, and don't want to work with me. Am I right?

Read more about the technique of Immediacy in Part 3.

- **...to create a friendly, encouraging atmosphere when I'm under pressure.** Feeling rushed, or upset by something that has just happened, will make you tense and perhaps short-tempered, particularly if you were already feeling tired or unwell. Even though it will take an extra five minutes, you could try taking a breather between each client. Ideally you can get up, go for a breath of air or glass of water, and at the same time take a few deep breaths (count to five as you breathe in, five as

you breathe out) ideally with your eyes closed, imagining a calm, relaxing scene (palm beach, scented flower garden). As you do so, tell yourself that you are feeling calm, that you will be able to focus on the client as a person worthy of care and respect, seeing the world through their eyes, and that you want to create a friendly, encouraging atmosphere for them.

