CONNECTING WITH CLIENTS

First Contact Through First Session
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I am a career counselor and therapist with 14 years experience in private practice in Washington D.C. My business depends on attracting and keeping clients, so I have devoted much thought and attention to the particular challenge of the intake process.

My clients come to me for help in three main areas: career exploration, job search and career management. In addition to my work with clients, I have a small consulting practice for career professionals, where I provide training and individual consultation services, especially for counselors and coaches looking to start or expand a private practice. I developed the Integrative Career Counseling (ICC) model to provide a framework for incorporating mental health approaches into career counseling. Prior to getting my masters in Community Counseling, I spent more than a decade working on trade negotiations for the U.S. Department of Commerce and the Office of the U.S. Trade Representative. That experience helped inform the first book I wrote: Coaching Career Clients through Salary and Other Workplace Negotiations. I am a regular presenter at regional and national conferences, particularly the National Career Development Association's annual conference. I was honored this year to be named the "Outstanding Career Professional" by the Maryland Career Development Association.

You can find me on the web at www.TheSavvyCareerCounselor.com, and follow me on Twitter: @ChopraCareers.com
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THREE STEPS FOR A NEW CLIENT

First Contact

Setting an appointment

So much to do!!
Facilitate new learning for the client: “Aha!”

Manage the brain-based process of connection
“In my experience, if a client learns something new about herself, she will come back.” Anne Gray

FACILITATING THE "AHA" MOMENT
NEW LEARNING

- Seeing patterns “I always do this”
- Locating oneself in the process “That’s where I am in my search”
- Normalization “I’m not alone/I’m not crazy”
- Discovering resources “Maybe I can do this”
- Getting a new perspective “Isn’t that interesting?”
- Seeing new possibilities “I hadn’t thought of that”
- Finding help “I don’t have to do this alone”
You don’t just need their mind, you need to engage their brain—and the brain is a social organ

MANAGING THE EMOTIONAL PROCESS OF CONNECTION
When the emotional brain takes over:

- Frontal Lobes Shut Down

As Emotional Activation Increases
EMOTIONAL SYSTEMS IN A POSITIVE LOOP

Anxious Client

Client feels safe

Counselor models openness

Calm, curious counselor

Client relaxes
EMOTIONAL SYSTEMS IN A NEGATIVE LOOP

Anxious Client

Client withdraws

Anxious Counselor

Counselor works harder to win over client

Client gets defensive
Taking care of business while managing the emotional process AND facilitating an “Aha!” Moment

THE CONNECTION CHALLENGE
FIRST CONTACT, LAST CHANCE?
WHAT A WEBSITE SHOULD DO

- Provide information about you, your process, your qualifications, your specialties
- Make the client feel calmer and more hopeful
- Generate an “aha” moment for the client
- Make it easy for the client to see himself in your practice
- Make it easy to contact you
Website Mistakes

- Written in the 3rd person—feels distant, impersonal
- Focus is on the counselor/coach and qualifications
- “Armored” websites are written with a defensive focus—here’s why I’m good—because it’s written to protect our insecurities.
- Too “arid” - not enough information for the client to connect
- Not enough internal linkages—allows clients to follow their own path through the information.
Use 1st person to start the connection process. “Talk” to the client via the website.

Include a picture

Put contact buttons on each page

Set up an “Aha” moment with rich content
  - Checklists
  - Common problems
  - Services
  - Blogs, articles, newsletters
  - Favorite books, blogs, links
  - Resources lists
  - Video if you have it
“YOU HAD ME AT HELLO”
“Reach out and touch someone”

FIRST PHONE CALL
Maximum Return, Minimum Time

- Get a quick summary of what the client wants help with—rephrase (Possible “aha”)
- Tell the client how you will work with him/her (Possible “aha”)
- Answer any questions (Possible “aha”)
- Provide pricing info, even if not asked
- Schedule the appointment
Use forms and documents to continue the connection process:
  - Informed consent
  - Data forms
  - Checklists
  - Questionnaires
  - Assessment Instruments
  - Reading
  - Other assignments
THE FIRST SESSION
CHALLENGES

- Paperwork—informed consent etc.
- First meeting jitters
- Divergent expectations
- Emotionally activated client
- Getting oriented
- Getting started
- Institutional policies/procedures
- Time limits
Facilitating an “AHA” Moment

- Get client to do most of the talking:
  - What questions do you have?
  - If we are successful in our work, what will have happened?
  - Tell me about: family history, career history, what you have done so far

- Offer thoughts/interpretations in small chunks, then check. Recalibrate as necessary.

- Do/review short assessments

- Check at end: “How did this meet your expectations?”
PERSONAL FAVORITES

- Family history
- Family Genogram/Career Genogram
- 9 Lives
- Likes/Dislikes chart
- MBTI—maybe
- Integrative Career Counseling approaches—emotion and patterns of thought, feeling, and behavior
PREPARE FOR THE SECOND SESSION

- Confirm that client wishes to schedule another session.
- Provide an assignment to continue the connection process
- Make assignments easy and short—prevent client discouragement  OR
- Give client lots of assignments—if they ask
- Set up another “Aha” moment
- Tell client you’ll be asking about epiphanies, questions and reactions.
Understand everyone can be intimidating
Call it like you see it—describe the pattern
Use your body language to modulate responses
What personality types are most challenged by you?
Get the problem out on the table where it can be addressed