

# MEET THE CLIENT

## Module 2

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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.

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Career Coach Training & Certification Program

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## || CAREER PURPOSE

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

Often time, 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, and 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 or 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 purpose from a career-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 and 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."

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## 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 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 such as a military officer/bomb disposal expert who 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.

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## **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 six (6) additional life/career purpose statements and potential employment opportunities to support them:**

1)

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2)

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*“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 doing the following:

- 1) Provide the best-written résumés and career marketing documents possible.
- 2) Coach and train career seekers to attain satisfying employment that 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, business management, 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, businesses, 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, math, listen, drive, arrange flowers, design interiors, etc.?)

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**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...? )

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**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?)

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

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**Are you passionate about an issue or cause?**

(Social security, senior citizens, pets, making sure people use excellent résumés?)

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

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

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

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

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**How can you overcome the limitations that you have noted?**

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**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:**



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**What will your legacy be?**

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**What do you want your legacy to be?**

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**Write your retirement announcement:**

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## || 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 should 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. That will allow 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 and dreaming
- 2) Putting thoughts to paper
- 3) Taking action

### **There are 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, career, family and spiritual matters, finances, or a combination of the three.

Short-term goals keep you on a tight rope, and they need to be more practical goals that 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.

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**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 and ultimate goals:**

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**What is preventing you from reaching your dream goals?**

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

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### **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. 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.

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## **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 and 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

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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, go on weekend outings once a month, sit at the dinner table 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, get a promotion; finish a degree, etc.)

**Financial goals**

(Save money, start a retirement fund, save for college, attend a financial seminar, etc.)

**Things goals**

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

**Adventure goals**

(Visit the Grand Canyon, go helicopter skiing, go zip lining, go scuba diving, vacation in Aruba or Europe, etc.)

**Spirituality goals**

(Read the Bible or other spiritual guides daily, go to church/temple weekly, meditate or do yoga regularly, etc.)

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**Contribution goals**

(Volunteer at the lung association, heart association, Red Cross, join the PTA, etc.)

**Personal development goals**

(Read a book a month, return to school for a degree, complete a certification, exercise, lose weight, etc.)

**Overcoming fear goals**

(Jump out of an airplane, hold a snake, mend a broken relationship, meet new people, seek new employment)

**Turnaround goals**

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

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:**

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## **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, 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 a Higher being better.

Review all your goals 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 dozens 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. When anything is 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).



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### **Top 8 Short-term Goals**

(One to two years to achieve)

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### **Top 8 Long-term Goals**

(More than two years to achieve)

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## **List the Big Three**

Review your top 10 short-term goals and focus on which three goals out of these 10 that can be 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)

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2)

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3)

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## **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 12-24 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 specifically must you do? What is your 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 #1 Action Plan:**

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**GOAL #2 Action Plan:**

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**GOAL #3 Action Plan:**

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## || GOALS (THE SHORT FORM)

**Your Definition of Success**

<b>2-year Business/Career Goals</b>	<b>5- to 10-year Business/Career Goals</b>
1.	1.
2.	2.
3.	3.
4.	4.
<b>Lifestyle Goals</b>	<b>Dreams/Ultimate Goals</b>
1.	1.
2.	2.
3.	3.
4.	4.

**Lifestyle Requirements & Priorities: List lifestyle requirements, then number in order of priority.**

- A. ( )
- B. ( )
- C. ( )
- D. ( )
- E. ( )
- F. ( )

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**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 five years, a Mercedes for me, an SUV for my spouse, and a college education for my children.

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

### **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 \$xx,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 website	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 into a 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 about savings
5. Timothy	We jog together three times a week, and he will listen to me. He will call and check on my goals and commitment dates. He will keep me on target.

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**Your Definition of Success**

*Landing the perfect job and making a good salary. Retiring as an executive.*

<p><b>2-year Business/Career Goals</b></p> <ol style="list-style-type: none"><li>1. Hire career coach</li><li>2. Meet with HR and identify an executive mentor</li><li>3. Get promotion to Director</li><li>4.</li></ol>	<p><b>5 to 10-year Business/Career Goals</b></p> <ol style="list-style-type: none"><li>1. Work with mentor to develop leadership skills</li><li>2. Apply for executive level positions in my company or explore options with recruiters for employment with a different company</li><li>3. six figure salary and up</li><li>4.</li></ol>
<p><b>Lifestyle Goals</b></p> <ol style="list-style-type: none"><li>1. Buy a home</li><li>2. Get married</li><li>3. Purchase new car</li><li>4. Join a gym and work with a nutritionist – stay fit a healthy</li></ol>	<p><b>Dreams/Ultimate Goals</b></p> <ol style="list-style-type: none"><li>1. Purchase a new 3,000 sq foot semi-custom house</li><li>2. Joint community Boards</li><li>3. Travel internationally once a year</li><li>4.</li></ol>

**Lifestyle Requirements & Priorities: List lifestyle requirements, then number in order of priority**

- A. (2) Buy a home
- B. (4) Travel internationally once a year
- C. (3) Get married
- D. (5) Purchase a new 3,000 square foot, semi-custom house
- E. (1) Join a gym and work with a nutritionist – stay fit and healthy



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**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 HR to discuss executive mentor program	2 months
2. Join a gym and find a nutritionist	Immediately
3. Get married	12 month engagement
4. Contact recruiters to discuss options with other companies	1 Year (after wedding)
5. Save money for trips	Now

**Accountability Partner, Coach, or Support/Success Team Members**

<u>Name</u>	<u>How can they help specifically with your goals?</u>
1. Sally at HR	She will help me find an appropriate executive mentor
2. Tom	He can recommend a good gym and nutritionist
3. George	He can teach me about investing and saving money
4. Amanda	The wedding coordinator
5. Matt	He sits on community boards

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## **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 whether it is tangible or intangible, we attach great importance to it. It is highly regarded.

A job seeker who accepts a position that is not in alignment with her values will become disengaged or frustrated on the job quickly.

Motivation inspires and gives purpose to a project, activity, or value. Motivation is the stimulus that spurs one on to start and complete something. Motivation is a person's intrinsic enthusiasm about and drive to accomplish activities related to work. Motivation is that internal drive that causes an individual to decide to take action. Is your client motivated by respect, recognition, benefits, high pay, a corner office?

### **List some things that you value.**

(Family members, house, car, grandmother's china, sleep, ocean breeze, teamwork, integrity, responsibility, accountability, dignity, friendliness, flexibility, accomplishment, innovation, or other?)

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8)

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9)

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10)

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**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) \_\_\_\_\_

**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 paycheck, 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, integrity, creativity, other?)

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_
- 6) \_\_\_\_\_

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7)

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10)

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

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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?**

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**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) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_
- 6) \_\_\_\_\_
- 7) \_\_\_\_\_
- 8) \_\_\_\_\_
- 9) \_\_\_\_\_
- 10) \_\_\_\_\_

---

**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.**

- |            |            |
|------------|------------|
| <b>1)</b>  | <b>21)</b> |
| <b>2)</b>  | <b>22)</b> |
| <b>3)</b>  | <b>23)</b> |
| <b>4)</b>  | <b>24)</b> |
| <b>5)</b>  | <b>25)</b> |
| <b>6)</b>  | <b>26)</b> |
| <b>7)</b>  | <b>27)</b> |
| <b>8)</b>  | <b>28)</b> |
| <b>9)</b>  | <b>29)</b> |
| <b>10)</b> | <b>30)</b> |
| <b>11)</b> | <b>31)</b> |
| <b>12)</b> | <b>32)</b> |
| <b>13)</b> | <b>33)</b> |
| <b>14)</b> | <b>34)</b> |
| <b>15)</b> | <b>35)</b> |
| <b>16)</b> | <b>36)</b> |
| <b>17)</b> | <b>37)</b> |
| <b>18)</b> | <b>38)</b> |
| <b>19)</b> | <b>39)</b> |







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**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. I 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 career coach, let's guide this client through the decision-making process of accepting one of the 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
- Second-floor, window office, and personal assistant
- 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, and profit sharing after one year
- Office in warehouse, no window
- Supervise five (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

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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 good fit position and company based on her values:

- She 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 little to no 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. Are they the same or different? If different, then continue with three and four in order of value priority.

This 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.

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## Values Exercise

<b>Top four (4) Life Values</b>	<b>Top four (4) Career Values</b>
1.	1.
2.	2.
3.	3.
4.	4.

<b>Value Requirements &amp; Priorities: Top six (6) values, placed in order of priority</b>
A. ( )
B. ( )
C. ( )
D. ( )
E. ( )
F. ( )

  

<b>What things do you NOT value that will burn you out at work faster?</b>
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)

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

<b>Value Requirements &amp; Priorities: Top 6 values, placed in order of priority</b>
<b>A. (1) Stable income of \$xxx,xxx per year</b>
<b>B. (2) Live by aging parents</b>
<b>C. (6) Live by ocean at retirement</b>
<b>D. (5) Lots of public contact/public speaking</b>
<b>E. (3) Some flexibility to help with parents</b>
<b>F. (4) Ensuring kids have money for college</b>
<b>What things do you NOT value that will burn you out at work faster?</b>
<b>1. Can't just sit at a desk...need lots of public contact</b>
<b>2. Prefer ocean breeze / view / don't like mountains or cold</b>
<b>3. Must have autonomy... can't stand micro-manager bosses</b>
<b>4. I am not creative ... don't care about arts</b>
<b>5. Don't like a quiet office...need lots of people to supervise and activity to keep challenged</b>

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**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 or 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 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):

<b>Medical &amp; Dental</b> (doctor, nurse, technical, dentist, dental hygienist, medical benefits administration specialist, physical therapist, surgeon, speech therapist, other)	<b>Teacher, Instructor, or Academia</b> (elementary, pre-k, college, librarian, research science, professor, private school, administrator, other)	<b>Executive</b> (for profit, non-profit, community, government agency, business manager, military, other)
<b>Finance</b> (accountant, bookkeeper, financial planner, banker, tax expert, credit manager, investment broker, budgeting specialist, insurance sales, fraud specialist, other)	<b>Food Service</b> (restaurant management, meat packing, distribution, grocery, bakery, fast food, sales, other)	<b>Engineering</b> (civil, professional, mechanical, construction, military, facilities, electrical, other)
<b>Construction</b> (homes, commercial structures, contracting, architect, plumber, electrical)	<b>IT</b> (hardware development, software development, programmer, database administrator, CIO, cyber security, FBI, help desk, other)	<b>Science</b> (biologist, NBC-nuclear, biological and chemical specialist, astronomer, archeologist, researcher, chemical technician, astronaut, other)
<b>Veterinary Science</b> (epidemiologist, zoo worker, dolphin trainer, professor, vet tech, veterinarian, other)	<b>Security</b> (security guard, security management, personnel security services, detective, physical/ industrial, other)	<b>Intelligence</b> (anti-terrorism and force protection, security, counterintelligence, SIGINT, HUMINT, military, Department of Defense,

		other)
<b>Police Work</b> (police, administrator, investigator, Park Ranger, security, Special Agent, Border Patrol, TSA, other)	<b>Fire and Emergency</b> (fireman, city government, ambulance driver, ENT, forest ranger, nurse, other)	<b>Non-profit</b> (administration, volunteer, management, trainer, consultant, other)
<b>Retail</b> (management, distribution, product development, sales, other)	<b>Sales and Marketing</b> (pharmaceuticals, products, retail, Public Relations, marketing, other)	<b>Business Development</b> (international business development, trade/import/export, operations, corporate communications, other)
<b>Public Works</b> (electricity, water, garbage, management, administration, civil, other)	<b>Child Care</b> (home child care, daycare/pre-school management or worker, tutor, other)	<b>Telecommunications</b> (management, sales, specialist, Uber, other)
<b>Video communications</b> (cable installer, IT specialist, help desk, other)	<b>Military Contractor</b> (varied, i.e., logistics, communications, engineering, management, trainer, range control, bio chemical expert, other)	<b>Transportation</b> (truck driver, HAZMAT, trainer, taxi, other)
<b>Logistics</b> (trucking, moving, distribution, operations, other)	<b>Counseling</b> (minister, therapist, career coach, school counselor, industrial psychologist, other)	<b>Holistic Medicine</b> (acupuncture, massage, herbalist, chiropractor, yoga, nutritionist, other)
<b>Venture Capitalist</b> (franchise owner, developer, investor, other)	<b>Project Management</b> (any industry—project leader, subject matter expert, consultant, team member, other)	<b>Hotel</b> (developer, owner, manager, housekeeping, bed and breakfast, other)
<b>Entertainment</b> (amusement parks, movies, TV, concert management, acting, other)	<b>Real Estate</b> (agent, developer, broker, financier, other)	<b>Human Resources</b> (personnel specialist, recruiter, union management and negotiations, career coach,



		résumé writer, trainer; state, university, unemployment, ombudsman, labor relations, other)
<b>Social Work</b> (adoptions, social security, WICK, hospital, new mothers, abuse, other)	<b>Manufacturing</b> (products, management, laborer, other)	<b>Artist (</b> painter, illustrator, woodworker, furniture designer, interior decorator, other)
<b>Law</b> (lawyer, court reporter, public defender, researcher, librarian, other)	<b>Writer/Communications</b> (journalist, résumé writer, photographer, TV broadcaster, public relations, public affairs, languages, historian, other)	<b>Sports</b> (athlete, coach, manager, administration, recreation/youth coach, other)
<b>Mechanic</b> (cars, machinery / refrigerators repair / sales, HVAC other)	<b>Fashion</b> (model, designer, sales associate, retail, management)	<b>Politics</b> (school board, state or federal government, Congress, Senate, other)
<b>Farming</b> (farmer, fish and game warden, rancher, other)	<b>Travel</b> (pilot, airport security, airport management, travel agent, cruise line management, hotel management, other)	<b>Other:</b> <i>Make a list of 20 other professions to add to the box</i> <i>(Green – wind energy, solar energy, museum curator, other)</i>

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**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)?**

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

**1)** \_\_\_\_\_

**2)** \_\_\_\_\_

**3)** \_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_

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## || ASSESSMENT TESTING

Personality tests also known as behavioral assessments and predictive tests were developed in the 1920s and were intended to ease the process of personnel selection particularly in the armed forces. Today, a wide variety of personality tests have been developed and designed to reveal aspects of an individual's character or psychological makeup. These standardized instruments are used in counseling, career counseling and coaching, employment testing, occupational health and safety, and customer interaction management.

Personality assessments are being used more often in the hiring process and assessment-type questions are being added to video interviews.

Also, during the job interview process, some employers require candidates to take an assessment test before they make a formal offer. This could mean a general assessment test to better understand professional preferences and personality type. It could also mean a skill-specific test in a particular area such as computers, writing, grammar or math. As if performing well in an interview wasn't stressful enough!

Some employers including the federal government, for specific positions or agencies, use Assessment Centers designed to measure different types of job-related skills and abilities including assessing interpersonal skills, communication skills, planning and organizing, and analytical skills.

An Assessment Center typically consists of exercises that reflect job content and types of problems faced on the job. For example, individuals might be evaluated on their ability to make a sales presentation or on their behavior in a simulated meeting. In addition to these simulation exercises, Assessment Centers often include other kinds of tests such as cognitive ability tests, personality inventories, and job-knowledge tests. An Assessment Center typically uses multiple raters who are trained to observe, classify, and evaluate behaviors. At the end of the Assessment Center, the raters meet to make overall judgments about people's performance. The Assessment Center can reduce business costs by identifying individuals for hiring, promotion, or training who possess the needed skills and abilities.

### **Types of Assessments:**

**Personality Tests:** Some commonly measured personality traits in work settings are extraversion, conscientiousness, openness to new experiences, optimism, agreeableness, service orientation, stress tolerance, emotional stability, and initiative or proactivity. Personality tests typically measure traits related to behavior at work, interpersonal interaction, and satisfaction with different aspects of work.

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**Cognitive Ability Tests:** Cognitive ability tests typically use questions or problems to measure ability to learn quickly, logic, reasoning, reading comprehension, and other enduring mental abilities that are fundamental to success in many different jobs.

**Interviews:** Interviews are often used to assess such things as interpersonal skills, communication skills, and teamwork skills, and can be used to assess job knowledge. Well-designed interviews typically use a standard set of questions to evaluate knowledge, skills, abilities, and other qualities required for the job.

**Integrity Tests:** Integrity tests assess attitudes and experiences related to a person's honesty, dependability, trustworthiness, reliability, and pro-social behavior. These tests typically ask direct questions about previous experiences related to ethics and integrity OR ask questions about preferences and interests from which inferences are drawn about future behavior in these areas.

**Work Samples and Simulations:** These tests typically focus on measuring specific job skills or job knowledge, but they can also assess more general skills such as organizational skills, analytic skills, and interpersonal skills. Work samples might involve installing a faucet, creating a document in PowerPoint, or tuning a musical instrument.

**Biographical Data:** May include leadership, teamwork skills, specific job knowledge, and specific skills. Biographical data typically uses questions about education, training, work experience, and interests to predict success on the job.

**Job Knowledge Tests:** Job knowledge tests typically use multiple-choice questions or essay type items to evaluate technical or professional expertise and knowledge required for specific jobs or professions. Examples of job knowledge tests include tests of basic engineering or computer programming principles.

**Physical Ability Tests:** Physical ability tests typically use tasks or exercises that require physical ability to perform. These tests typically measure physical attributes and capabilities such as strength, balance, and speed.

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 to be completed online or hard copy by your client and sent to you for review.

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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 as the coach. 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](http://www.aca.org) or the National Career Development Association at [www.ncda.org](http://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, Strengths, 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's personality or behaviors to guide in discussions, résumé development, career management, and prepare for interviews and pre-employment assessments.

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## **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](http://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](http://www.advisorteam.com).
- **The Self-Directed Search:** The Self-Directed Search at [www.self-directed-search.com](http://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 Work Behavior Inventory:** The Work Behavior Inventory 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 and Administrative Staff, and Administrative Support. 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. <http://aai-assessment.com/products/work-behavior-inventory>

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- True Colors at [www.truecolors.com](http://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](http://www.onetcenter.org/tools.html).
  - O\*NET® Online Skills Search [www.online.onetcenter.org/skills](http://www.online.onetcenter.org/skills). This report provides occupations that correspond to skills by degree of match.
  - *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](http://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.
  - Career Liftoff® Interest Inventory generates information on six occupational themes and 30 career fields. [www.careerliftoff.com](http://www.careerliftoff.com)

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## **360 Degree Assessments**

Feedback from a 360° Degree Assessment 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 and obtains 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. The 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 area, 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](http://www.reachcc.com).

### **Sample entries from a 360 Assessment:**

#### **Hello**

The summary below represents all the 360°Reach™ responses you have received so far. You have received 26 responses out of 57 requests sent. Your response rate is: 46%. The summary of the data you received: **Brand Attributes | Brand Skills | Strengths and Weaknesses | Projective Exercises | Team Role | Other**

#### **Your brand attributes**

Dependable (11)

Organized (9)

Accessible (7)

Confident (7)

Credible (7)

Caring (6)

Experienced (6)

Honest (6)

Collaborative (5)

Conservative (5)

Intelligent (5)

Supportive (5)

#### **Your brand skills**



Writing (11)	Communicating(listening, speaking) (10)	Public speaking (8)
Managing projects (7)	Coaching (6)	Counseling (6)
Analyzing (5)	Inspiring others (5)	Relating to others/building relationships (5)
Teaching (5)	Thinking internationally / globally (5)	Writing/ presenting reports (5)
Collaborating (4)	Empowering others (4)	Interviewing (4)

### Strengths and weaknesses

#### **Your greatest strengths:**

A great passion for her industry, her colleagues, and her clients (1)  
 Communication (1)  
 Counseling (1)  
 Diane is one of the most organized and decisive women I know. (1)  
 Flexibility (1)  
 honesty (1)  
 Her ability to lead and educate her peers (1)  
 Her ability to put people at ease. (1)  
 Her ability to review a lot of information, distill it, and create/write marketing materials for very specific requirements (1)  
 Her experience with job interviews and what to expect (1)  
 Her genuine love for others confidence in herself (1)  
 Knowledgeable (1)  
 Listening (1)  
 Public speaking (1)  
 success driven (1)  
 Writing Expertise (1)  
 Writing skill (1)

#### **Your greatest weaknesses:**

none (2)  
 I did not notice any. (1)  
 I know of none (1)  
 None that I've seen  
 Not prioritizing her time on what is most important (1)

### Projective exercises

#### **Type of Car:**

a toyota camry because it's a sporty & practical (1)  
 bmw. gets from a to b quickly and in great style! (1)  
 corvet- classy and red (1)  
 suv because she is a classy person who gets places that are not accessible to ordinary vehicles. (1)  
 infinity - refined, classy, efficient (1)  
 jeep she can get you through most anything. (1)  
 mercedes benz, dependable and reliable (1)  
 mercedes, very dependable (1)  
 mercedes. she is a confident woman who stands out in a group with poise, beauty and dependability. (1)  
 mini cooper; current and efficient (1)  
 minivan (she's about family and "sturdiness" (1)  
 prius-does a lot with what she has, tries to do good not only for herself but also to others around her. (1)

#### **Type of Cereal:**

bran flakes-not overly sugary, good for you, gets the job done (1)  
 cap'n crunch mixed with bran flakes. gets the job done but is sweet and friendly while doing it. (1)  
 cheerios, cheery, optimistic and experienced (1)  
 granola because she is very healthy. (1)  
 frosted flakes nice with a sense of humor (1)  
 frosted mini wheats--good for you but with some fun thrown in for good taste! (1)  
 granola- a mixture of everything, a little nutty, fruity, crunchy, with a lot of taste (1)  
 granola. wants to be good for you (1)  
 muesli (international) (1)

#### **Team Role**

(8) Doer - takes a portion of the project and executes it.  
 (6) Facilitator - orchestrates the group, helping it to achieve its goal.  
 (4) Leader - takes charge, assigning tasks and deadlines.  
 (3) Creator - comes up with creative ideas for what to do and how to do it.  
 (2) Motivator - inspires others to participate and be successful members of the team.

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## **Personality**

What makes your clients tick? Understanding their basic personality aids in “listening” better and posing better or more targeted 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. They are the ones that say “trust me it will work out.” 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, and 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 their greatest interests, and they achieve in subjects that are mentally interesting. They are impatient with drill and routine. They question authority. Child cholerics allow their parents to live in the house.

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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 other’s 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 with 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, and punctual. They say, “I need to be useful and belong.” 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. 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. Understanding a client's personality will help in adjusting the career coaching to best meet the client's needs.

## **Identifying Your Personality Type**

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

Producer ( )	Expresser ( )	Analytical ( )	Congenial ( )
(Task oriented)	(Communications oriented)	(Thought oriented)	(Emotions oriented)
<b>(Choleric)</b>	<b>(Sanguine)</b>	<b>(Melancholy)</b>	<b>(Phlegmatic)</b>

### **General Profile**

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

<ul style="list-style-type: none"> <li>• Dogmatic</li> <li>• Impatient</li> <li>• Insensitive</li> <li>• Lonely</li> <li>• Burnout - Fatigue</li> </ul>	<ul style="list-style-type: none"> <li>• Emotional</li> <li>• Over-indulge</li> <li>• Poor Time Management</li> <li>• Too Talkative</li> <li>• Arrogant/Self Assured</li> </ul>	<ul style="list-style-type: none"> <li>• Insensitive</li> <li>• No Risk Taking</li> <li>• Finicky</li> <li>• Lonely/Self Sufficient</li> <li>• Boggled Down in Details</li> </ul>	<ul style="list-style-type: none"> <li>• Dependent</li> <li>• Too Easy-going</li> <li>• Low Self-esteem</li> <li>• Taken Advantage</li> <li>• Unappreciated</li> </ul>
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## || 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 challenges in creating résumés and cover letters which can raise red flags with recruiters due to multiple positions or gaps in dates as an 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 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 such as 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 to include a new degree and change of industries
- Seeking a position on a committee or association

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- Seeking a promotion via employment with a new employer utilizing a recruiter or confidential career search strategy
  - Developing 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 oral 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 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 she did not choose. Possibly her parents suggested she pursue a certain career path or she took a summer college job that lasted for 10 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. Her career interests may be very different from her current position or 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 a 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 her career path, she can regain some lost confidence and feel more fulfilled.

## **3) The employee loves what he 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

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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 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 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 her success, salary, and improve the quality of her life. If the commute is frustrating for the client, perhaps she 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

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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?