



UNITED STATES DEPARTMENT OF LABOR

Employment & Training Administration - Region 2

# Facilitating Customer Ownership for Success



In this session you will learn counseling techniques to promote customer ownership of the IEP/ISS, *through:*

- I. Establishing customer rapport quickly.
- II. Facilitating the goal-setting process
- III. Engaging the customer in problem-solving.
- IV. Encouraging and reinforcing progress.



## The IEP/ISS is...

- A Collaborative Process
- A Living Document
- An Ongoing Strategy
- A Roadmap to Success

INDIVIDUAL DEVELOPMENT PLAN

Name: \_\_\_\_\_ Manager: \_\_\_\_\_  
Position: \_\_\_\_\_ Date: \_\_\_\_\_  
Date in Current Position: \_\_\_\_\_

**Section A: Career Plan**

Personal Mission Statement

Short-Term Career Goals (1-2 years)

| Area of Interest/Position Title | Competencies/Skills/Knowledge Needed (Areas Listed to Develop) |
|---------------------------------|--|
|                                 |  |
|                                 |  |
|                                 |  |

Long-Term Career Goals (3-5 years)

| Area of Interest/Position Title | Competencies/Skills/Knowledge Needed (Areas Listed to Develop) |
|---------------------------------|--|
|                                 |  |
|                                 |  |
|                                 |  |

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# What do customers want?

They want...

- to be provided with effective, efficient service.
- to make their own decisions.
- to be provided with timely, accurate information.



# Strengthening the Process

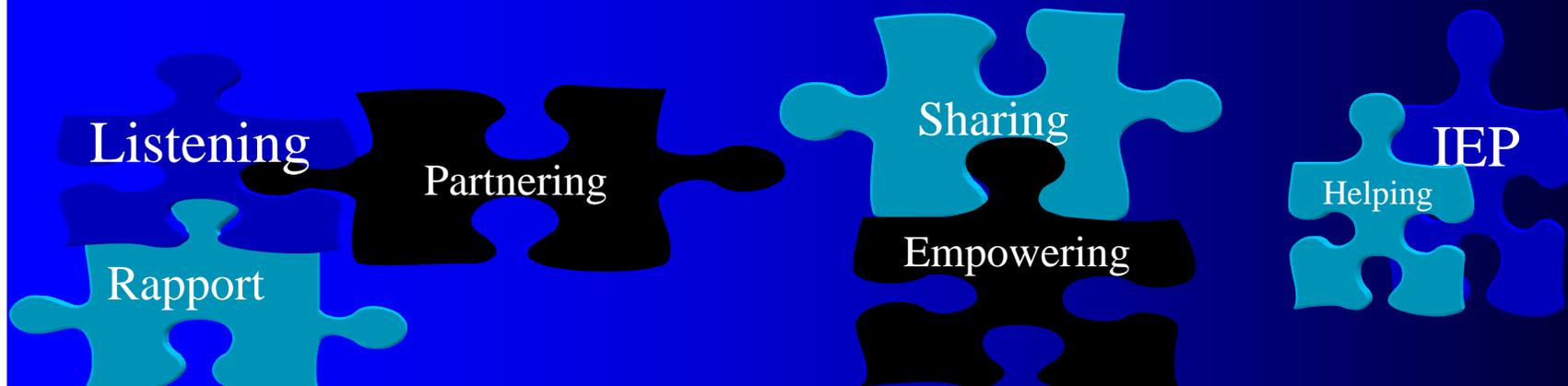
- How can the case manager better partner with the customer in the IEP/ISS process?
- How are case managers ensuring customers can make informed choices?
- What gaps exist between the IEP/ISS and follow up services?



## Bringing it all together...

In this challenging economic environment building rapport through service delivery strategies and employing new and creative techniques to obtain customer buy-in to their individual employment plans is vital to the customer's success and performance.

A customer's progress is **YOUR** success.





Good customer service can always be found at the core of strong customer relationships.

Customer relationships between the Case Manager and customer are built through establishing clear communication, organized service delivery, consistent follow up, and positive interactions.



## I. Establishing customer rapport quickly

- Courtesy and friendliness are not enough.
- Prior to customer interaction, be prepared and knowledgeable.
- Thank them.
- Don't lose the human touch.



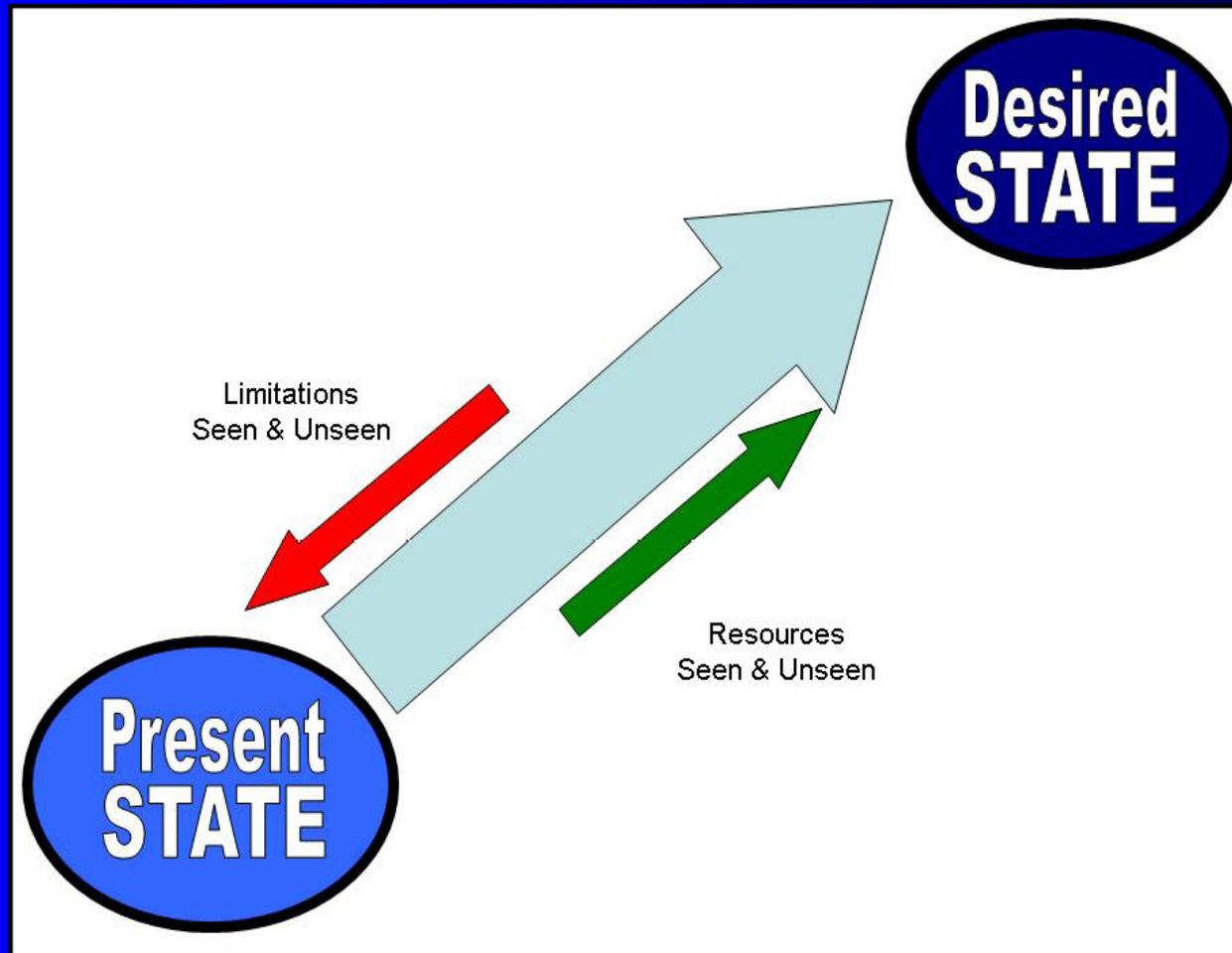
## II. Facilitating the goal-setting process



- Consistent, Clear Communication of Pathways to Success.
- Hold the customer accountable by...
- Remember what the IEP/ISS is!



### III. Engaging the customer in problem-solving





## IV. Encouraging and reinforcing progress



- **Assurance**
- **Reassurance**
- **Encouragement**
- **Positive Reinforcement**



# Web Data Resources Examples

- 20 CFR Part 663.240 and 663.245
- **Career One Stop**, <http://www.careeronestop.org/>
- **Workforce3one.org**
- **Hamre, Timothy C.**, *How to write an effective Individual Employment Plan*, The National Council on Aging, [http://www.doleta.gov/Seniors/html\\_docs/Docs/Workshop%20Materials/3/Individual%20Employment%20Plan%20\(IEP\).pdf](http://www.doleta.gov/Seniors/html_docs/Docs/Workshop%20Materials/3/Individual%20Employment%20Plan%20(IEP).pdf)
- National Association of Workforce Development Partners, [www.nawdp.org](http://www.nawdp.org)
- Cornell University, College of Human Ecology, Family Development Credential, <http://www.human.cornell.edu/HD/FDC/>



Questions?



## Case Study #1:

Cameron is a 19 year old, high school graduate recently laid off from the construction field as a carpenter's helper. The site foreman says he has great skills, however, right now he needs skilled carpenters on this five-year project. Cameron returns to his counselor at the One-Stop who assisted him in getting this job. Cameron is upset and disappointed because he was a good employee and had not missed any days from work since beginning 9 months ago. What counseling technique should case management staff utilize to handle Cameron's case and re-gain his buy-in after this disappointing situation? Why?



## Case Study #2:

Diane has been engaged with the One-Stop system for 7 years. She has completed training for Medical Coding, Nursing Assistant and Patient Care Technician. Although she has received significant training and has done well on the certification exams; she has problems retaining employment. During her last case management appointment she and the case manager discussed her current employment and by all accounts things were progressing well with the exception of the job not being exactly what she had imagined it would be in that it required group assignments and reporting.

The case manager listened, wrote a case note regarding the visit and asked if she needed any further assistance.

- Which counseling technique should be used in Diane's case?
- What opportunities did the case manager "miss" during the meeting?
- Was the case manager successful in creating the partnership? If no, please explain.