

# CONNECTING WITH CLIENTS

First Contact Through First Session



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# KAREN JAMES CHOPRA BIO

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.

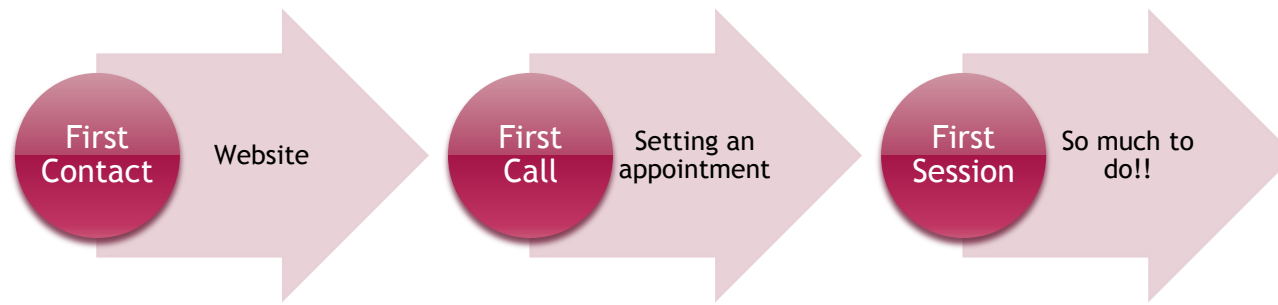
You can find me on the web at [www.TheSavvyCareerCounselor.com](http://www.TheSavvyCareerCounselor.com), and follow me on Twitter: @[ChopraCareers.com](https://twitter.com/ChopraCareers)

# WEBINAR FUNDED BY THE U.S. DEPARTMENT OF LABOR

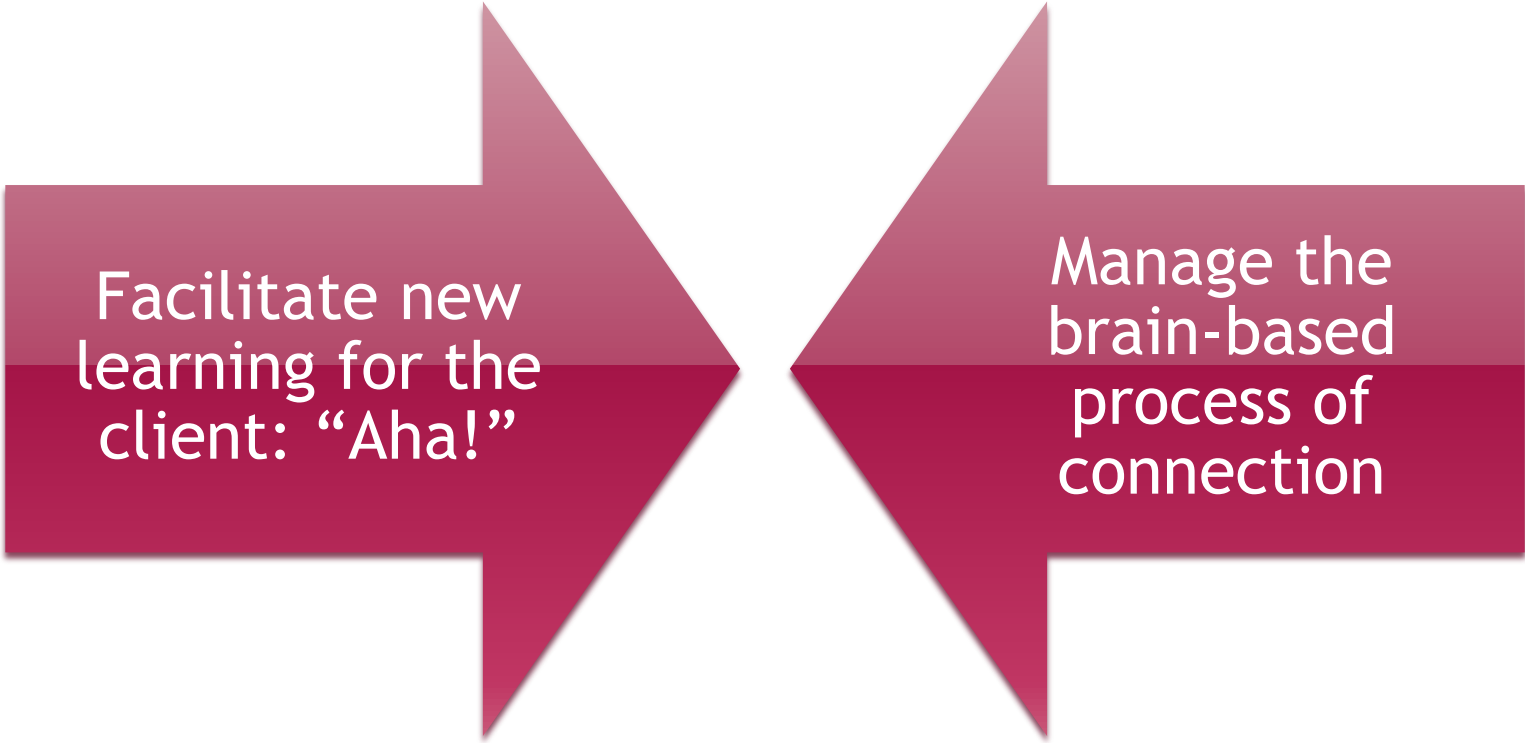


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# THREE STEPS FOR A NEW CLIENT



# TWO KEYS TO CONNECTION



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

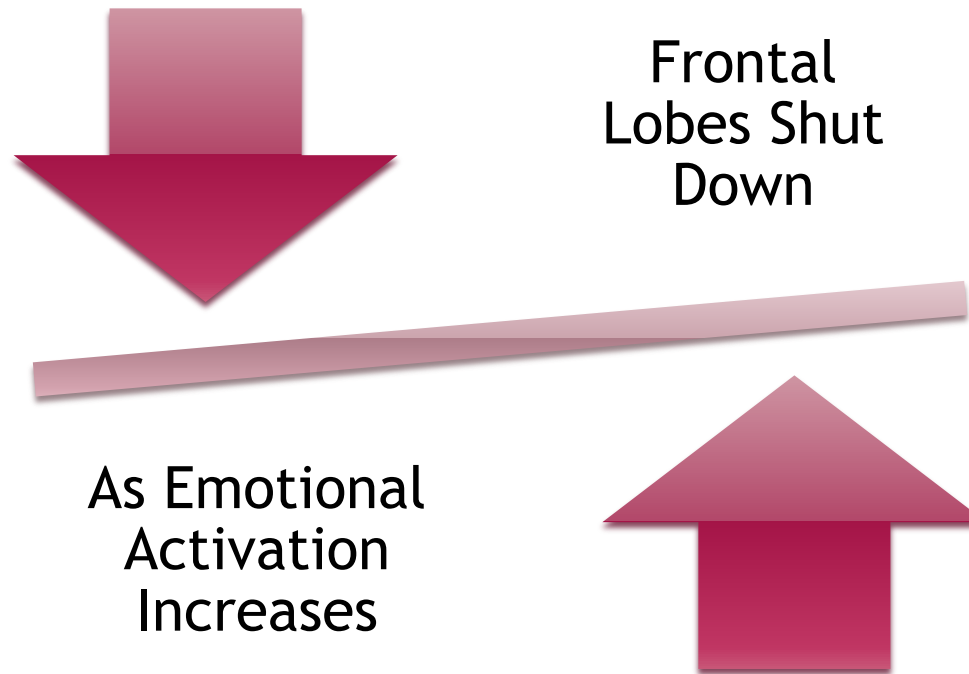
- ◉ Seeing patterns “I always do this”
- ◉ Locating oneself in the process “That’s where I am in my search”
- ◉ Normalization “I’m not alone/I’m not crazy”
- ◉ Discovering resources “Maybe I can do this”
- ◉ Getting a new perspective “Isn’t that interesting?”
- ◉ Seeing new possibilities “I hadn’t thought of that”
- ◉ Finding help “I don’t have to do this alone”



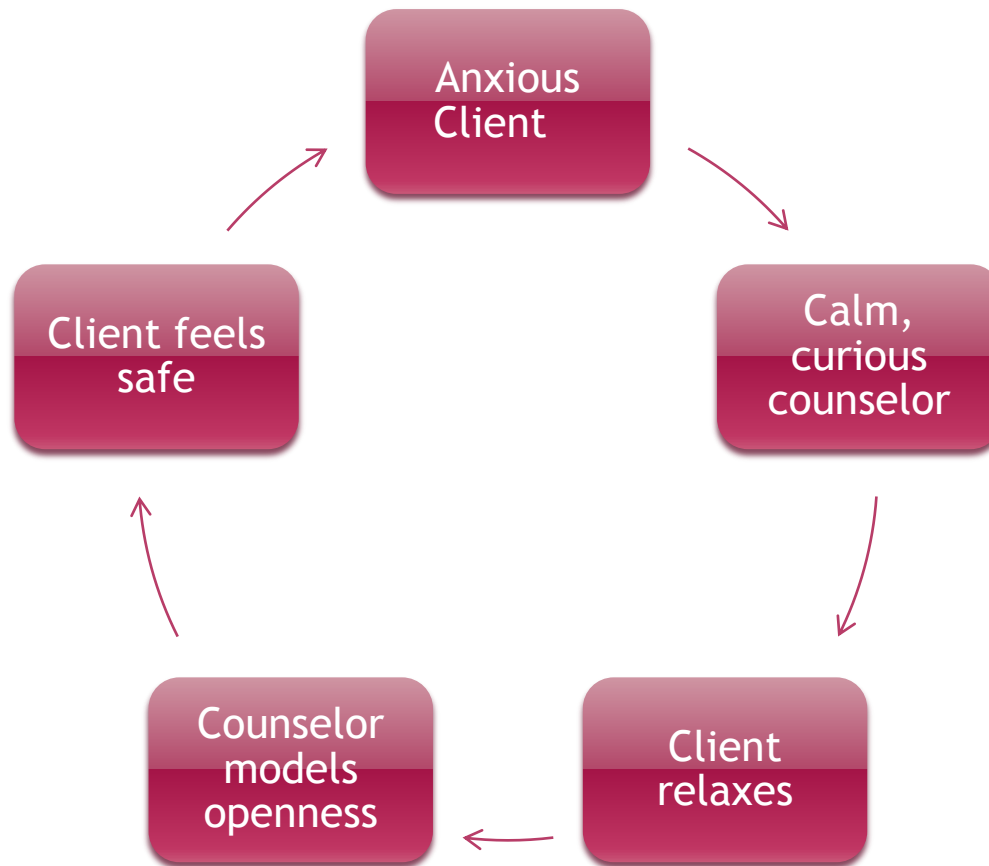
You don't just need their mind, you need to engage  
their brain—and the brain is a social organ

## MANAGING THE EMOTIONAL PROCESS OF CONNECTION

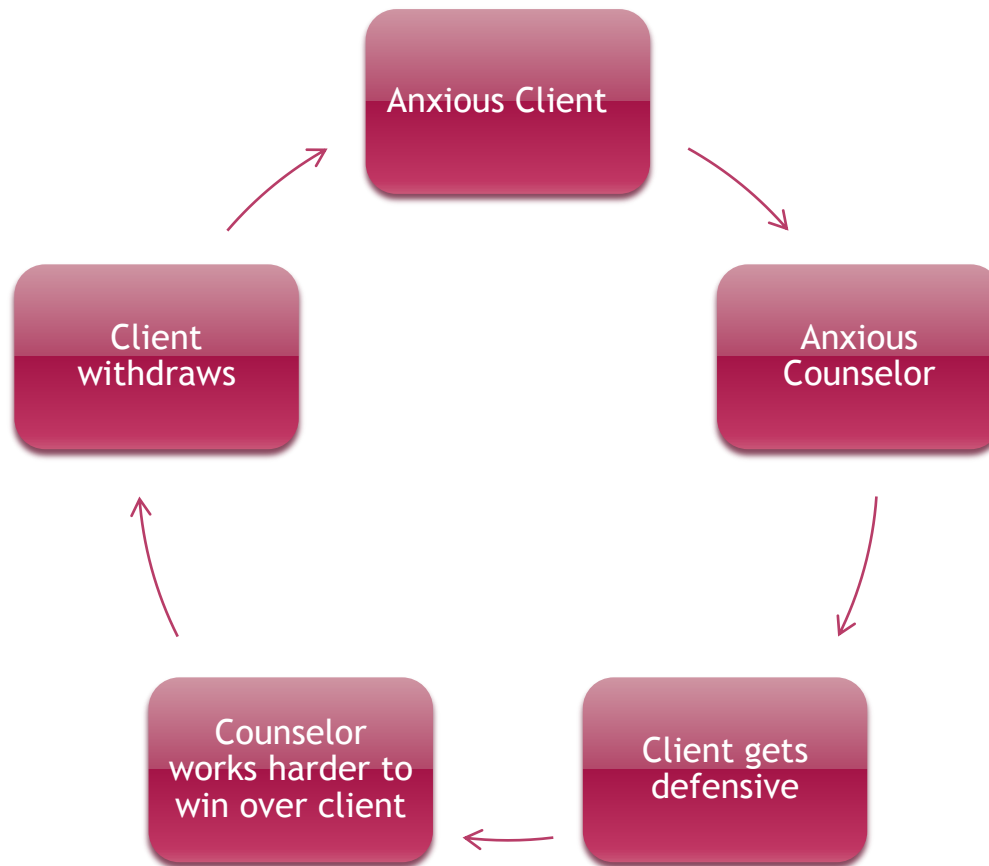
# WHEN THE EMOTIONAL BRAIN TAKES OVER:



# EMOTIONAL SYSTEMS IN A POSITIVE LOOP



# EMOTIONAL SYSTEMS IN A NEGATIVE LOOP



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 3<sup>rd</sup> 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.



# CONNECTING VIA THE WEBSITE

- ◉ Use 1<sup>st</sup> 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

# BRIDGE TO THE FIRST SESSION

- ◉ 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.

# TECHNIQUES FOR MANAGING THE EMOTIONAL CONNECTION

- ◉ 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