Practical Tips and Tools to Strengthen Your ERA Program:

A Technical Assistance Guide for the Employment Retention and Advancement Project

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About The Authors

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Melissa Wavelet, Operations Associate at MDRC, has worked on workforce development issues during the past eight years. She divides her time between ERA and the Opening Doors Demonstration, a national study of community college innovations for serving low-income adults. Before MDRC, she was part of the workforce development grant making team at the Ford Foundation and a manager of education and training programs in the South Bronx.

Sharon Rowser, Vice President and director of MDRC's Oakland Office, specializes in the delivery of technical assistance in the areas of welfare-to-work, programs for noncustodial parents, and employment and training systems. She currently directs MDRC's work on the national project, Building Strong Families, and leads technical assistance efforts in several others, including ERA. Previously, she was the manager of DOL's Welfare-to-Work Technical Assistance project and Winning New Jobs, a replication of a successful job search assistance program, and she was the operations coordinator for the national Parents' Fair Share demonstration, which aimed to increase the employment and earnings, and child support paid by absent parents to poor families. Before coming to MDRC, she was a program officer in the Ford Foundation's Urban Poverty program.

Frieda Molina, Senior Operations Associate at MDRC, has worked on the delivery of technical assistance in the areas of workforce and economic development over the last fifteen years. She divides her time between ERA and the National Work Advancement and Support Center Demonstration, a new project that aims to increase the income of low-wage workers. Prior to her work on ERA, she managed MDRC's Neighborhood Jobs Initiative, a five site neighborhood-focused employment initiative, and before joining MDRC she managed a national sector-focused employment project for a national economic development intermediary.

Dina Berin, Operations Analyst at MDRC, has worked on the delivery of technical assistance in the areas of welfare reform and employment for the past four years. She has worked closely with several ERA sites and oversees the ERA Learning Community Website. She also has development and management responsibilities on a new initiative called the Enhanced Services for the Hard to Employ Demonstration and Evaluation Project, a national evaluation of programs designed to enhance employment outcomes for people who face serious obstacles to steady work.

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Background

ERA sites, like many programs across the country, face major challenges designing and implementing employment retention and advancement programs. Staff are expected to perform a new set of tasks and go beyond "business as usual" to assist their clientele in remaining connected to the labor market and advancing beyond low-paid entry-level jobs. Staff delivering post-employment services are required to possess different skills and different knowledge than they used to in pre-employment programs. Yet little is known about the kinds of activities that might be effective. The only rigorous research in this area to date indicates that case management alone is probably not enough.

MDRC and The Lewin Group have worked with many of you for the past three years to help develop and strengthen your ERA programs. Through the use of consultants and operations staff, we've provided advice, training, and tools in a variety of areas. As your programs have evolved, our training has focused more on specific activities that staff might undertake with clients to help them improve their ability to keep their job and advance.

Advancement in the ERA project is loosely defined as any set of activities that contribute to the pursuit of an improved employment situation for the client. Of course a "better" job is defined differently by each client with the help of program staff. This intentionally loose definition allows staff to be flexible, creative and customize the program services to each client. Yet, it also means that staff are often left to figure out what specific activities might work best to help a client retain her/his job and advance to the next.

Management Checklists

MDRC recently began working with Cygnet Associates to consolidate the many tools shared with sites in the ERA trainings into a Toolkit. The ERA Toolkit is a set of practical tools that have been specifically designed for ERA program managers. The Toolkit focuses on helping you work with front line staff to improve the delivery of employment placement, retention and advancement services in your sites. Cygnet Associates provides training on the use of all tools and management checklists provided in the Toolkit.

The Toolkit is not a curriculum; the tools are structured manager checklists that help you look for and assess whether staff are using systematic methods and activities to help their ERA clients. We hope these tools help you evaluate and boost your staff performance as the ERA project matures. Since some of the tools are more geared towards job developers and others for case managers, you may use different tools for different staff depending on the staffing structure of your ERA program. Lastly, the Toolkit does not address other roles or responsibilities that managers might also assume, such as team building or staff development.

The tools cover a number of topics that were covered in training delivered to ERA sites, including:

- Outreach and Recruitment
- Participation and Motivation
- Retention
- Advancement

We have also included topics that were not taught in any trainings but nevertheless seem important:

- Goal Setting
- Case Notes
- Building Employer Support

How will you use the checklists?

Each chapter is dedicated to a topic area and opens with 1) a list of the tools and samples available in that chapter; 2) a list of suggested other local resources that you might develop for your staff, 3) and a Manager's Checklist of questions that pertain to the tools and how they are used. These checklists do not need to be used verbatim. You may decide that you want your staff to use only a few of the tools and samples provided, which might make some of the checklist questions irrelevant. You may want to use all the tools and all the checklist questions, but you might group them to be used at specific stages of work with a client. Some may be mandatory and some optional. All of the tools and checklists can be printed, and of course, adapted to your local program operations.

How will you prioritize among the checklists?

There are eight chapters in the Toolkit and most focus on one component of an employment retention and advancement program. Chapters Seven and Eight however, can stand on their own and present a comprehensive sequence of steps managers and front line staff can follow.

It may be best to begin with **Goal Setting.** Are your program goals clear and quantifiable? Do you have a way of measuring performance against these goals? Have you communicated the goals to staff? If your answers are "yes", you are ready to move on to the other topics.

If you are the manager of a program just beginning operations, you may address topics chronologically making **Outreach and Recruitment** and **Participation and Motivation** your priorities until clients begin moving into program activities.

If your program is mature, you can use the tools to add to your current array of services and/or to troubleshoot areas that are not producing the results you expected. For instance, if client participation is dropping, turn to **Participation and Motivation.** If clients can't juggle the demands of work and family or they are quitting prematurely, use the **Retention** chapter. If staff are largely focused on solving client problems and never get to advancement activities with clients, go to the **Advancement** chapter. If staff are struggling to understand how to work with employers and build relationships that can benefit clients, use the **Building Employer Support** chapter.

An important underlying assumption is that you as the program manager have some way of tracking and motivating staff performance, including any or all of the following: regularly scheduled meetings of supervisors with individual staff members; case conferencing with staff; and regularly scheduled reports of individual or office performance.

Conclusion

We hope these tools are useful and provide some practical tips to strengthen your program and to help your clients experience greater success. If you have any questions or comments, you can contact MDRC or Cygnet Associates (see contact information below).

Good luck! You are doing important work and forging new paths for other employment and training programs to follow.

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Chapter 1: Goal Setting

If it is true that you get what you measure, then it is important that managers define what will be measured. Once the goals to be measured are outlined, staff can be held accountable and rewarded for the goals that they achieve. If program managers measure job placement, then clients will get placed in jobs. If program managers want to achieve advancement goals (income improvement), then they need to be defined and measured. Chapter 1 introduces how program managers can define and track program goals.

Below are some sample measures that are incremental in nature. Managers should decide which, if any, apply to how their program is defined and what should be measured.

Income Improvement

- Increased hourly wage by 3%.
- Increased hours by 25%, if at 1-20 hours a week.
- Achieved 40 hours a week.
- Moved into dream job or work in "field of fascination."[1]
- Moved into field with better pay, better career opportunities, or benefits.
- Obtained health insurance.
- Completed GED course.
- Passed GED test.
- Enrolled in vocational training while employed and has attended at least 8 hours in the month.
- Completed training.
- Completed OJT and moved into training-related job in the company.

Retention

- Maintained job for 30/60/90 days.
- Arrived to work on time for 30 consecutive days.
- Worked steadily for 30 consecutive days without any absences.

Re-Employment

- Obtained another job within 30/60 days.
- Obtained another job within "field of fascination."
- Obtained another job within target wage range.

[1] "Field of fascination" is a term used by WorkNet Training & Publications to describe the industry or area that best matches the client's interests, utilizes the skills she loves to use, and helps her attain her personal goals. It is similar to the concept of a "dream job."

Defining the Goals

The next step is to decide what is a reasonable goal that stretches staff a little beyond what they think they can easily accomplish.

The manager should decide:

- Should the goal be for a team of staff or for an individual staff member?
- Should the goal be for a week, month, quarter or year? (Note: If you pick weekly, then staff have to follow-up weekly with clients to see if they have met the goal. So the measurement will impact how services are provided).
- Can one client achieve more than one type of advancement goal within the same period? For example, if a customer completes a GED and also gets a pay increase does that count towards one or two advancement goals?
- Should all staff have advancement as a goal or only certain staff (i.e., case managers, retention counselors, etc.)?
- Should there be variation between offices?

Examples:

- Each case manager will get five advancements per month.
- Each team will get fifteen advancements per quarter.

Tracking the Goals

The manager should decide:

- What process will be used to measure the goals?
- Does this process underscore the importance of achieving these goals?
- Does the process create a healthy competitive spirit among staff?
- Will it be weekly, monthly, quarterly or annually?
- How will it be shared or published?
    - Will a report be published for all staff to see how others are doing?
    - Will there be a chart so staff can see that it is important to you?
    - Will you meet individually with all staff or only those who under perform?
    - Will you include it in monthly staff meetings?
- How often will you meet with staff about their performance?
- Is there a recognition or incentive system in place to reward staff who achieve the program goals?

Examples:

- Each month a team meeting will review the number of job placements. These numbers will be posted by team in a bar chart in the office lunchroom.
- A summary of the total number of placements and job upgrades will be calculated and contributed to the annual staff performance review.
- Each time a client gets a promotion to a higher wage job, that new wage will be entered into the automated tracking system. Each quarter, the manager will calculate the total dollar amount of all the wage increases clients have earned. If staff collectively exceed a dollar figure set as the goal at the beginning of the year, a celebratory dinner is held.

Chapter 2: Advancement

Advancement in the ERA project is loosely defined as any set of activities that contribute to the pursuit of an improved employment situation for the client. Of course "better" is defined differently by each client with the help of program staff. In ERA, we believe that it is never too soon to begin discussing advancement (even for clients who have just been placed on the job). At least 30 percent of staff's work with clients in week one should be geared towards advancement activities. Over time this percentage should increase. Chapter 2 includes seven tools to help staff understand what advancement is and how to support clients as they pursue it.

Tools the staff can use:

- 2a. What is Advancement?
- 2b. Income Improvement Plan
- 2c. Advancement Activities Checklist
- 2d. Client Follow-up Advancement Questionnaire
- 2e. Employer Follow-up Advancement Questionnaire
- 2f. Education and Training-Readiness Package (child care, transportation, financial aid, budgeting and time management units)
- 2g. Income Improvement Orientation Binder

Other resources to add to your toolkit:

- In-house expert or directory of education and training opportunities in the community.
- Career ladder information for basic jobs in which clients are interested.
- Job descriptions for positions clients are interested in working toward.
- Career ladder information for local jobs that clients commonly pursue.
  - For example, America's Career InfoNet at www.acinet.org, a U.S. DOL supported website that includes wages and employment trends, occupational requirements, state by state labor market conditions, millions of employer contacts nationwide, and the most extensive career resource library online; or
  - A Santa Cruz county specific tool www.careerladders.net, which is an on-line map of employment and training opportunities, providing job seekers and workforce development professionals with information on job requirements and characteristics, education and training opportunities, and salary benchmarks for local jobs with viable career paths.
- Information on the range of work supports available to working families.

- ③ Go to the "Making Wages Work" section of the website www.financeprojectinfo.org/mww/index.asp for a good overview of potential income supports.
- ③ Another resource is www.govbenefits.gov, which is a screening tool to help identify government benefits that a client might be eligible to receive.

⑨ Income Calculator to facilitate a budgeting exercise and outline how a client's public benefits will be affected when he/she works or as his/her earnings increase.

Manager's Checklist:

⑨ Is an advancement plan developed with the client as soon as s/he gets a job? Is the advancement plan used as an ongoing plan with constant updates? Is the plan updated every time there is client contact? Does the plan include:

- ③ The client's goals and motivations;
- ③ The client's dream job or "field of fascination;"[2]
- ③ A review of the client's progress toward the goals;
- ③ A review of any work issues, specific activities or strategies to overcome the work issues;
- ③ At least one assignment at each contact that relates to increasing hours, pay, promotion or moving to a job in the "field of fascination;"
- ③ A review of the client's contact information;
- ③ A time for the next meeting;
- ③ Recognition or incentives for work done.

⑨ Do you see evidence that the client is given a copy of the plan each time it is updated (which would be at each point of contact)?

⑨ Does each client have a dream job or "field of fascination" identified?

⑨ Is there an outline of the steps to getting that dream job? Does each case note entry or counseling session following job placement include a recommended activity for moving the client towards the career goal? For example, if the client's goal is to be a nurse, an activity could be to get a catalogue for nursing schools in the area.

⑨ Do staff work with clients to understand what advancement looks like in their current company (i.e., increasing hours, increasing wage, obtaining benefits, getting promotions)?

⑨ Does each case note entry or counseling session following placement include a recommended activity or behavior that can lead to advancement?

⑨ Are staff referring clients to education and training? Do you see evidence of this?

[2] "Field of fascination" is a term used by WorkNet Training & Publications to describe the industry or area that best matches the client's interests, utilizes the skills she loves to use, and helps her attain her personal goals. It is similar to the concept of a "dream job."

- Are staff determining basic suitability for school? For example, do clients referred to school have written plans for:

    - Child care, including back-up plans;
    - Transportation, including back-up plans;
    - A budget that shows how they will afford school and their household needs;
    - Financial aid; and
    - Time management that shows that the client understands what his/her schedule will be in terms of hours at school, studying time, and commuting time.

- Do staff assist clients to clearly understand the field/industry, the pros and cons of the job, the environment associated with the field and the associated salary? For example, have clients referred to school done any of the following:

    - Conducted an informational interview;
    - Followed someone on the job - "job shadowing";
    - Volunteered; and
    - Conducted research on the field/industry.

- For clients who are in school, is their case manager helping them to develop his/her schedule? Monitoring grades and attendance? Helping them find a tutor when necessary? Providing information on study skills?
- Can staff clearly articulate the difference between advancement and retention activities?

    - **Advancement** are those activities that lead to pay increases, increases in hours, promotions, and schooling that increases the skills of the client.
    - **Retention** are those activities which simply stabilize the client, such as arranging child care, assisting with transportation, resolving work issues that could cause the client to be fired (for example, punctuality problems or attendance issues) and counseling clients on life problems that are outside of work but impact the clients ability to work (for example, drug addiction, homelessness, abusive relationships, etc.).

- Is the frequency of contact intense enough to coach the client and mold behavior?
- Is the employer contacted periodically to get his/her view of the client's progress and advancement opportunities?
- Are staff helping clients to move from a current job to a job in a field that pays better or provides better career advancement and/or benefits?

Tool 2a. What is Advancement?

Instructions: This is a list of sample advancement goals that can be used to set goals with your clients. This list could be given to the client to generate ideas during the development of the Income Improvement Plan, or your program's equivalent. It will need to be modified to match the goals of your project.

- Increased hourly wage by 3%.
- Increased hours by 25%, if at 1-20 hours a week.
- Increased hours by 15%, if at 20-30 hours a week.
- Increased hours by 10%, if at 30-36 hours a week.
- Achieved 40 hours a week.
- Obtained a promotion.
- Moved into dream job or work in "field of fascination."
- Moved into field with better pay, better career opportunities, or benefits.
- Obtained health insurance.
- Obtained sick time, vacation time or personal time as a benefit.
- Obtained retirement, profit-share, or other such account.
- Enrolled in GED while working and has attended at least 8 hours within a month.
- Completed GED course.
- Passed GED test.
- Enrolled in vocational training while employed and has attended at least 8 hours in the month.
- Completed training.
- Got an On-the-Job-Training (OJT) voucher AFTER beginning work and had been working at least two weeks.
- Completed OJT and moved into training-related job in the company.
- Other: ______________________________________

Tool 2b. Income Improvement Plan

Instructions: The Income Improvement Plan is a template of a document used by front line staff to work with clients to set goals, to outline plans of action and to track progress made toward those goals.

Most ERA sites have some form of a "plan" yet staff often use it to merely comply with paperwork requirements - it is just another form to be filed. We encourage sites to consider the plan a living document that should be shared with the client and used as a motivational tool. It is a document that should complement client case notes. Together these two documents should tell an objective story of the client's experience since s/he started participating in the program. Lastly, it should be a document that could stand on its own if another staff person needed to begin working with the client from scratch.

Tool 2b. Income Improvement Plan

Client Name: ____

Major Motivators/Life Goals: ________________________________

"Field of Fascination"/Job Interests: ___________________________

____

Goal of Income Improvement Plan (check all that apply)

- Increase hourly wage by 3%.
- Increase hours by 25%, if at 1-20 hours a week.
- Increase hours by 15%, if at 20-30 hours a week.
- Increase hours by 10%, if at 30-36 hours a week.
- Achieve 40 hours a week.
- Obtain a promotion.
- Move into dream job or work in "field of fascination."
- Obtain health insurance.
- Obtain sick time, vacation time or personal time as a benefit.
- Obtain retirement, profit-share, or other such account.
- Enroll in GED while working and attends at least 8 hours within a month.
- Complete GED course.
- Pass GED test.
- Enroll in vocational training while employed and attend at least 8 hours in the month.
- Complete training.
- Get an On-the-Job-Training (OJT) voucher AFTER beginning work and working at least two weeks.
- Complete OJT and move into training-related job in the company.

Contacts and Case Notes:

Date:

Objectively describe significant events, issues, concerns, and successes.

Plan:

Outline short-term steps to achieving any of the goals checked above or to address any problems. Plan should indicate who does what (case manager or client) and a timeline.

Income Improvement Plan
SAMPLE

Client Name: *Anita Jobs*

Major Motivators/Life Goals:

Make better life for her kids.
Stop being hassled by welfare.
Be able to afford to live in a nicer house.

"Field of Fascination"/Job Interests:

Nursing beginning with nurse's aide.
Work in a helping field.

Goal of Income Improvement Plan (check all that apply):

- ☐ Increase hourly wage by 3%.
- ☐ Increase hours by 25%, if at 1-20 hours a week.
- ☑ Increase hours by 15%, if at 20-30 hours a week.
- ☐ Increase hours by 10%, if at 30-36 hours a week.
- ☐ Achieve 40 hours a week.
- ☐ Obtain a promotion.
- ☐ Move into dream job or work in "field of fascination."
- ☐ Obtain health insurance.
- ☐ Obtain sick time, vacation time or personal time as a benefit.
- ☐ Obtain retirement, profit-share, or other such account.
- ☑ Enroll in GED while working and attends at least 8 hours within a month.
- ☐ Complete GED course.
- ☐ Pass GED test.
- ☐ Enroll in vocational training while employed and attend at least 8 hours in the month.
- ☐ Complete training.
- ☐ Get an On-the-Job-Training (OJT) voucher AFTER beginning work and working at least two weeks.
- ☐ Complete OJT and move into training-related job in the company.

Contacts and Case Notes:

Date: *9/3/2002*

Anita worked all days she was scheduled. She said going to bed earlier worked but some nights she just isn't tired. Anita did 6 activities in the punctuality unit. She did not stop at the GED site as agreed. Job developer spoke to Carla Anderson. She got a good evaluation. Anita is upset because her hours were cut to 25 hours per week because the daycare center isn't full and doesn't have enough children. Anita gave CM new cell phone (555) 123-4567 to update contact info.

Plan:

- *CM will encourage her to stick with plan to get to bed as early as possible to prevent arriving to work late.*
- *CM will send congratulations letter and incentive to Anita once she has completed the last two punctuality units.*
- *CM will discuss plans for Anita to stop by GED site in the next two weeks.*
- *Anita will ask the supervisor about any other opportunities to increase her hours.*
- *Anita and CM will meet in two weeks to go over GED application and explore other ways to increase hours at this job or another.*

Tool 2c. Advancement Activities Checklist

Instructions: This checklist outlines six categories of advancement activities that can lead to an improved employment situation for the client. Each checklist contains activities that a client can do to work towards advancement (within the current employer or another). Manager should encourage staff to use these lists as a "cheat sheet" when coaching clients and setting advancement goals. These types of activities should be documented in both case notes and the Income Improvement Plan. Staff should encourage the client to commit to any of the listed activities. The categories include:

- Earning a Promotion
- Earning a Raise
- Increasing Work Hours
- Getting Work Benefits
- Getting a Job in Your "Field of Fascination"
- Getting Education and Training

Earning a Promotion

1) Ask for a job description of your position and for any positions that you might someday be interested in moving into. When asking, tell the supervisor you want a job description so you can better understand how the organization functions and where you fit into the company.

2) Compare the qualifications on the job description to your qualifications for the job. Make a plan to get the needed qualifications.

3) Show initiative by asking for special projects.

4) Work to meet and exceed all production standards.

5) Accept extra hours when the supervisor makes the request.

6) Offer to do jobs outside of your job duties.

7) Let the supervisor know when you have completed your tasks and can accept more jobs.

8) Identify the "power" in the company and ask them to be your mentor.

9) Find successful people in the position you want. Journal two things you notice about them. Try to practice those characteristics.

10) Do informational interviews with people who are at higher levels. Ask them what they did to advance.

11) Find out what is important to management and concentrate on doing those things well.

12) Have lunchtime conversations with people in other departments about work issues. Do this to learn about other jobs, NOT to complain about your unit.

13) Practice expressing ideas for work with your case manager and friends.

14) Present a proposal for a new idea of something you would like to try on the job.

15) Solve personal problems outside of work. Discuss only work issues at work.

16) Ask for a performance review. Ask what is needed to advance to the next job.

17) Ask what people look for in people who they promote.

18) Document your accomplishments in a journal. Let the employer know about the things you've done. Do this indirectly. "Over the weekend, I was thinking about x. I sat down and wrote down some of my ideas." You just let the employer know that you were doing things outside of work, which shows initiative.

19) Keep a list of things you are doing, skills you are developing, and your accomplishments. Use these on resumes to show why you should advance.

20) Volunteer to work in/at the job you'd like to move into.

21) Volunteer any time a supervisor will be out to do part of their work tasks.

22) Help your supervisor do some of his/her tasks.

23) When bringing a problem to a supervisor, always bring a solution.

24) Listen for something your supervisor hates to do. Volunteer for that job.

25) Do not bad mouth or gossip about others.

26) Watch for openings in the company. Apply for those openings. Do not expect to automatically get promoted without asking for the position.

27) Anticipate staff changes (retirements, promotions, quits). Get the credentials you'd need to move into that position.

28) Join a professional organization in your "field of fascination."

29) Offer to coach or train a new employee.

30) Be a friend to new employees. They may move up.

31) Offer to help co-workers.

32) Apply for the next level. Make sure the supervisor knows you want to move up.

33) Take care of equipment and tools.

34) Make the person ahead of you successful so they move up.

35) Dress and behave like the people who are at the next level.

36) Inquire about additional training you can take at work that might be offered through the company.

37) Explore advancement opportunities with other employers.

Earning a Raise

1) Ask about raise points at hire. Enter into salary negotiations at hire/review.

2) Bring in a staff/employee handbook so you and the case manager can review it.

3) Ask for a raise but only after a minimum of three months on the job if no raise point has been established.

4) Check with competitors. See if they pay more.

5) Work on shifts that have a pay-differential.

6) Ask about the criteria to get a raise.

7) Find out about bonuses and incentives for working faster.

8) Keep a list or a log about what you do. Make a list of special projects you have done. Be prepared to explain why you should get a raise. Present your "portfolio."

9) Work with your case manager to write a list of transferable skills.

10) Look for a better paying job while you are still employed.

11) Ask the case manager to follow-up with the employer. Let them ask about a raise.

12) Practice how to ask for a raise. Role-play with staff.

13) Do not talk about how much money you make with other employees.

14) Ask for a performance review between raise points.

15) Do work that is outside of your responsibilities or job classification.

16) Take training to learn new skills that are needed at the next level.

17) Learn negotiation skills.

18) Stay on your job through the raise point so if you look for another job you can say you earned the higher wage.

19) Participate in union activities, if appropriate.

20) Write a proposal outlining what you do, and compare it to what employers pay staff who have these responsibilities.

Increasing Work Hours

1) Get child care and transportation arrangements made so you can increase your work hours or be available for overtime hours. (See Tool 3c. Job-Readiness Package for assistance with planning how to achieve this.)

2) Propose new ideas about things that need to be done. Create a job.

3) Let the supervisor know you would like to work more hours.

4) Work hours that are difficult for the employer to get employees to work.

5) Offer to fill in when others are off.

6) Tell your co-workers to call you if they have hours they can't cover. When the co-worker asks for the time off, s/he can tell the employer you agreed to cover his/her shift.

7) Work in two different departments for the same employer.

8) Work a second job.

9) Offer to work holidays, weekends, evenings and the less desirable shifts.

10) Have phone or access to a phone so you can be reached for extra hours.

11) Work all of the hours you are already assigned.

12) Learn additional duties so you can fill in for people who are in positions different from your own.

13) Try your best to cover any extra shift your employer asks you to work or you may be taken off the top of the list of employees to call.

14) Increase your productivity beyond the cost of paying you.

15) Market the employer's business.

16) Ask your supervisor if there are unmet goals you can work on.

17) Offer to do a task you see needs to be done.

Getting Work Benefits

1) Inquire about insurance at work.

2) Get a personnel handbook. Bring it to the case manager to help you review.

3) Learn skills at this job and then apply with a company that offers benefits.

4) Work in jobs that have unions.

5) Research benefit packages for the company.

6) Ask for benefits instead of a raise.

7) Increase your hours to full-time.

8) Provide your employer with information on the company's savings when turnover rates are reduced because employee benefits are offered.

9) Ask if you can be part of a payroll deduction plan so you can purchase insurance.

10) Consider benefits beyond medical/retirement:

- Vacation
- Child care
- Training or educational benefits
- Location of work (home)
- Free technology available

Getting a Job in Your "Field of Fascination"

1) Go on an informational interview with someone who already works in the field you want to move into.

2) Take an interest test if you aren't sure what you want to do.

3) Find out the qualifications and education you need to get that job.

4) Volunteer or do a work experience on a job you think you might like.

5) Job shadow a person doing the job you think you might like.

6) Do one thing per week that moves you ahead on finding or acquiring your dream job.

7) Develop a career plan that moves you toward the dream job.

8) Talk to your case manager about getting any training you need to get the dream job.

9) Ask your current employer what they think you'd be good at within that company. Learn enough about the job to see if you would like that position.

Getting Education and Training

1) Call a GED or vocational training center just to get information on hours of operation.

2) Visit the center to see what it is like and whether you'd like it.

3) Call your training advisor to see how to apply for school.

4) Get an application for the school.

5) Complete the application for the school.

6) Get an application for financial aid.

7) Complete the application for financial aid.

8) Audit a class for a day. See what it is like to be there. Observe.

9) Go to a new student orientation to hear more about what the program will be like.

10) Talk to an alum or student that attends the training to see what it is like.

11) Take a pretest to see where you would place in the training.

12) Take an aptitude test to see if you have the aptitude to learn the skill.

13) Get a copy of the certificate or diploma and put it on your refrigerator to remind yourself why you are doing this.

14) Sign up for the course/program.

15) Explore 'distance learning' opportunities.

16) Ask your employer if you could work a schedule that allows you to attend classes.

17) Write a list of the benefits of having your GED.

18) Write a list of the benefits of having a certificate in a vocational training program.

Tool 2d. Client Follow-up Advancement Questionnaire

Day One:

- Did you get an employee handbook?
- Did you get a job description?
- Do you know the first point at which a raise is possible?
- Did you get a new employee orientation?
- Have you any information on pay differentials for alternative shifts? How about overtime?
- Did you learn about benefits?
- Tell me about your first day. What did you do?
- How many people did you meet?
- Did you find out anything that surprised or interested you?
- Did you see anything that really interested you?
- Are there any jobs you'd like to do?
- Did you see any similarities between your job and your "field of fascination" job?

Week One:

- Did you get job descriptions for other positions so you can learn more about how the company operates?
- Did you ask to do any extra duties on your job?
- Have you asked about training that your supervisor might see you need?
- Have you asked if there is a way for you to get a mentor on the job?
- Are you keeping a log of production goals and your performance toward meeting those goals?
- Have you asked to go to lunch with any co-workers?
- Did you offer to work any other shifts?
- Did you find out about performance evaluations? When are they? Who does them? What is evaluated?
- Have you learned about other jobs in the company?
- Do you feel comfortable talking to your supervisor?

Week Two:

- Have you performed or offered to perform any duties beyond your own job description? Have you asked for extra duties?

- Have you found a mentor?
- Are there any areas that are really challenging?
- What is the culture of the organization? Specifically:
  - Do people show up to work early?
  - Do people in higher levels look or dress differently than you do?
  - Do they promote from within?
  - How rigid are they on following rules or procedures?
- Have you made any friends? Is there anyone you admire?
- Could you keep a log of two things you think one of the successful people do and then try to adopt those behaviors?
- When you run out of work, do you wait for the supervisor to give you something else to do or do you go to her/him to get extra work?
- Is this job what you thought it would be? What is better? What isn't as good?
- Have you discovered which job tasks other people don't like to do? Is it something you could volunteer for?
- Are there any jobs that do not get done that really need to be done? Is that something you could offer to do?
- (Part-Time) Have you asked about working additional hours or shifts?

Week Three:

- Are there any other jobs you are interested in? Is there a way that you could help the person who holds that job (while still doing your own job)?
- Are you meeting production goals?
- What are three things that are important to your supervisor? How are you in performing those things?
- You have now had time to review the personnel handbook. Are there promotional opportunities that the handbook addresses?
- Have you reviewed the job descriptions you have gathered?
- What are the qualifications or credentials that you'll need to get to be ready to move up or add more hours?

Week Four:

- Are there any opportunities to be cross-trained by other workers?
- Do you know if the company promotes from within?
- Is there additional training you need that would help you move up or earn more?

- Have you identified any problems in your job? Have you thought of and suggested some solutions?
- Have you gotten a thirty-day performance review yet?
- Have you identified anyone who you would consider approaching to be a mentor?
- Have you taken lunch or breaks with people from other departments? How could you do that?
- What does your supervisor hate to do? Are they simple tasks that you could take on?
- Is your supervisor friendly and helpful?
- Have you been keeping a log of your accomplishments and performance meetings production goals? This will be helpful when asking for a raise, promotion or updating your resume.
- Have you heard any rumors about anyone leaving or getting a promotion?
- Have you looked into a job in your "field of fascination"?

Week Eight and Beyond:

- When is the date of a pay raise? What have you done to earn a raise?
- Is your probationary period over?
- When are you eligible for benefits?
- Do you see any opportunities for advancement in the company?
- Have you taken the opportunity to volunteer for learning additional jobs? What have you done to exceed expectations?
- Are you meeting or exceeding your goals for this job?
- How does this job fit into your life goals?
- Are you still keeping a list of your accomplishments?
- What further skills or training would you need to move up or get more hours? What steps have you taken to prepare for advancement? (Training, shadowing, informational interviewing, volunteering, etc.)
- What steps have you taken to address things you'd like to change about your job?
- Have you talked to your supervisor about how you are doing? Do you know what is important to your supervisor? Do you focus on those areas?
- Name someone your supervisor likes or someone who is a successful employee. What does that person do that makes them so successful? What could you do to be more like him/her?
- Are you permanent status yet?
- Have you asked for raise? Would you like some guidance on how to ask for a raise?
- Have you updated your resume to record your job and new responsibilities?

Tool 2e. Employer Follow-up Advancement Questionnaire

Instructions: Employers are generally concerned with reducing employee turnover. Turnover is expensive to employers. To hire and train an employee costs a business about one third of the annual salary of that employee. Providing services to an employer that helps reduce turnover can help increase profits.

Most employment and training programs are asking employers to hire employees whom employers would consider to be risky. Meanwhile many employers are risk-adverse. Hiring the wrong person not only costs money but impacts employee morale and can be frustrating. Employers want to know that if they take the risk and hire someone from a program that there will be services beyond the placement. They want service after the sale.

Many programs have attempted to provide follow-up services to employers and have not been well received by the employer. Staff conclude that employers don't want to be bothered with follow-up calls so they are reluctant to make them. Closer scrutiny would show that what has been termed "follow-up" to employers in the past was no doubt perceived by the employer as just a nuisance. Calls were to find out a client's work hours, the pay rate, the total income of the last paycheck, etc. All of those questions require that the employer go look up data either manually or on a computer. These questions gave the program staff the information they needed in order to claim a job placement but they did not represent a "service" to the employer.

True follow-up involves coaching and mentoring the new employee. It means identifying the new worker's strengths and areas needing improvement. It means working with the employer to help mold the employee into a valued employee. The employer sees this as a resource rather than a nuisance. Helping employers mold a new worker into a valued worker helps the employer reduce turnover, save money and have a committed employee.

This tool outlines questions that will help you provide the support to your client as s/he becomes a valued employee.

Employer Follow-up Advancement Questionnaire

Client Name: ____

Employer Name: ____

Supervisor Name: ____

1. So far, do you think the employee has all the skills needed to adequately learn the job?

   ____

   Have you discovered additional skills or aptitudes the worker needs that you did not mention or know of during our initial interview? Which would you want to add now? ( ) yes ( ) no Explain.

   ____

2. How well has the employee responded to the training that has been provided?

   ____

3. Does s/he seem to fit in with the other workers?

   ____

4. Has the employee been to work every day s/he was scheduled? On time? If not, did s/he call in advance to let you know?

   ____

   ____

5. Is the employee meeting the company's standards in terms of dress/grooming?

   ____

6. When instructions are given to the employee, are they written or verbal?

   ____

   How well is the employee following instructions?

   ____

   ____

7. When the employee needs to ask questions, does s/he ask the supervisor or a co-worker? Is this appropriate?

   ____

8. Does the employee seek out work when s/he is not busy or does the employee wait to be given directions?

   ____

   ____

9. When the supervisor is not present, does the employee perform adequately?
   ( ) yes ( ) no

10. When the employee is given constructive criticism or supervision, is s/he willing to accept it? ( ) yes ( ) no

11. Is the quantity and quality of work produced by the employee up to your usual standards? ( ) yes ( ) no

12. Does the employee need further training to move up in his/her job or to retain the job? If so, what type of training does s/he need? What skills do they need to learn?

    ____

    ____

Tool 2f. Education and Training-Readiness Package

Instructions: For many clients, the only pathway to advancement will require them to gain more skills. Some might be able to do this through an on-the-job-training arrangement, but the majority of clients will have to return to school. Just as their lives can become more difficult to manage as a client begins work, their juggling act only worsens as they try to be a worker, a student and a parent. For some, the logistics and coordination can be overwhelming and lead to leaving their jobs or their training. This Education and Training - Readiness Package includes a set of four planning exercises to assist the client as they balance work, school and family responsibilities. This tool is very similar to the Job Readiness Package (Tool 3c), but it is focused on assisting the client who is combining work AND school. Front line staff should work with clients to complete each unit as h/she prepares to attend training in addition to work. Each unit will address a different area in the client's life that could become a reason to drop out of their training or quit their job. These units are:

- Budgeting
- Child Care
- Transportation
- Time Management

HOW WILL YOU SURVIVE?
Budgeting

BUDGETING

Instructions: When you first enroll in school, you will need to figure out how to budget the money you make. Use this worksheet to help you plan your initial budget as we work to help you increase your income. There is a list of numbered decision items for you to consider and when each is completed a date should be entered.

Date Completed **Decision Item**

_____________ 1. Add together your sources of income.

PRESENT FINANCIAL ASSISTANCE	CURRENT $ PER MONTH
1. Income from present job	
2. Income from odd jobs	
3. Gifts/loans from others	
4. Welfare assistance	
5. Food Stamps	
6. Other	

NO COST SERVICES	$ PER MONTH
1. Medical assistance	
2. Child care	
3. Housing assistance	
4. Free lunch program	

TOTAL INCOME: $____________

______________ 2. Make a list of your expenses.

COST OF LIVING	CURRENT $ PER MONTH
Rent	
Electric	
Gas	
Water	
Sewage/Garbage	
Telephone	
Food	
Clothing/Uniform	
Public Transportation	
Laundry	
Medical/Dental	
Cable TV	
Books/Newspaper	
Credit Card Payments	
Auto Insurance	
Other Insurance	
Child Care/ Child Support	
Gasoline	
Miscellaneous	

TOTAL EXPENSES: $___________

______________ 3. Do you have other financial resources (a working spouse, parental assistance, a savings account, a friend)?

Yes ( ) No ( )

______________ 4. Are your bills more than your income?

Yes ( ) No ( )

______________ 5. If your bills are more than your income, how will you make ends meet while in school?

____

____

______________ 6. How much money are you short per month, if any?

____

______________ 7. Based on your calculations, would you need to work part-time while in school?

Yes ( ) No ( )

How many hours a week would you need to work? ________

______________ 8. Will your income remain the same during the entire time you are in school? For example, will your unemployment be exhausted?

Yes ( ) No ( )

Explain: ______________________________________

____

____

____

______________ 9. If any person will be supporting you while you are in school, bring in a written statement from that person saying they will support you. The statement needs to include: 1) nature and length of relationship; 2) what the person is willing to contribute (money, room, board, rides, etc.); and 3) how long they are willing to provide the support.

______________ 10. Based on all these calculations, are you financially able to survive until you complete school?

Yes ( ) No ( )

WHO WILL TAKE CARE OF YOUR KIDS?
Child Care

CHILD CARE

Instructions: Part of your decision to return to school may depend on finding child care with which you are comfortable. This child care might be different from the child care you use when you are working. As you explore the child care in the area, you may find a variety of options. To help you determine which is the best child care option for you we have prepared the following worksheet. Completing it will help you decide which option feels the most comfortable for you. There is a list of numbered decision items for you to consider and when each is completed a date should be entered.

Date Completed	**Decision Item**
_____________	1. Ask relatives and friends whether they would be willing to watch your child(ren) while you are at school. Let them know that you may be at school up to 8 hours a day. Name two people you asked: ___________________________ ___________________________ *NOTE: Even if a family member or friend agrees to watch your child, you must complete all remaining items.*
_____________	2. If a friend or relative agrees to watch your child(ren), then get a written statement from them saying that s/he agrees to watch the child(ren) during school hours. The reason for getting a written statement is so that you can tell whether the person is serious about helping you. If s/he won't sign a paper, you may want to rethink relying on this person. <u>You must bring in this written statement</u>.
_____________	3. Contact Headstart to get information. Get on their waiting list, if possible. Name of person you spoke with: ____________________ Phone # _______________ *If your child is 5 years or older, write N/A next to item 3.*
_____________	4. Call Child Care Resource and Referral at xxx-xxxx. Name of person you spoke with:_______________________

_____________ 5. Gather information on two child care facilities in the area, other than family friends. Complete the attached Child Care Facility Information Sheet on each facility. Call only licensed facilities.

_____________ 6. Estimate the weekly cost of meeting your child care needs. The child care provider must be at least 18 years old and not your parents to be considered for payment.

Estimated cost: $_______________

_____________ 7. Based on the information you have obtained, determine which type of child care you desire:

( ) Friend/relative/unlicensed
( ) Licensed facility
( ) Headstart
( ) Pre-school
( ) Other ____

_____________ 8. If enrolled, whom would you choose as your primary child care provider?

____

_____________ 9. What is your alternate plan in case the primary plan does not work out?

____

____

_____________ 10. What is your emergency plan for when your child(ren) is ill?

____

____

______________ 11. What is your plan for getting your child(ren) to the facility?

____

____

______________ 12. Are you ready and willing to leave your child(ren) with your primary provider?

( ) Yes
( ) No
( ) Not sure

______________ 13. Are you ready and willing to leave your child(ren) with your alternate or emergency provider?

( ) Yes
( ) No
( ) Not sure

CHILD CARE FACILITY INFORMATION SHEET

(put two of these in packet)

Instructions: This form is not for use with a family member or friend but only for a facility. It must be completed whether or not you intend to use this facility.

1. Name:

2. Address:

3. Phone:

4. Hours of operation:

5. Age range of children accepted?

6. Does provider allow for overtime hours?

7. How much advance notice does the provider need for overtime hours?

8. Can the facility accept ill children?

9. Which meals are provided?

10. Are there educational activities that the children can do?

11. How many other children are at this facility?

12. What is the availability of slots?

13. Does this facility offer occasional drop-in services? If so, at what cost?

14. What are the regular hourly, daily, or weekly costs?

15. What is the payment schedule (daily, pre-paid, weekly, monthly)?

16. What are the overtime rates?

17. Is there a special rate for infants? If so, how much?

18. Is there a discount for a second or third child?

19. Do you do reference checks on staff?

20. Do you encourage drop-in visits?

Other comments:

HOW WILL YOU GET TO SCHOOL AND WORK?
Transportation

TRANSPORTATION

Instructions: You need to think about how you will travel between your job, school and home each and every day. You may own a car, plan to ride public transportation, walk or make other arrangements. You will want to consider time, distance, and costs. There is a list of numbered decision items for you to consider and when each is completed a date should be entered.

Date Completed **Decision Item**

_____________ 1. What type of transportation will you primarily use to get to training?

( ) Your own car or motorcycle
( ) Public transportation (bus)
( ) Friends/Parents will drive
( ) Bicycle/Walk
( ) Car pool
( ) Work at home
( ) Get training close to home
( ) Find training where transportation is provided
( ) Find training where I can live on-site
( ) Lease a car
( ) Buy a car
( ) Catch a cab or hack
( ) Other __________________________

_____________ 2. If you went to school, you would have to use this transportation 3 to 5 days per week, twice per day.

If you plan to use your own car:

a. On a scale of 1-10, with 10 being "very reliable,"

How reliable is your car? ___________

What is the make/year of your car? ____________________

How many miles are on your car? _____________________

b. What repairs would it need to be "very reliable?"

____

____

c. If you had to be in school for 6 months to 2 years, what additional repairs do you think your car would need?

____

d. Do you have a current and valid driver's license?

Yes ( ) No ( )

e. Do you have violations or unpaid traffic tickets on your record?

Yes ( ) No ( )

How much do you owe? ____________________________

What type of violations: ____________________________

f. Do you have insurance? Yes ( ) No ( )

____________ 3. If you plan to use public transportation:

a. Pick up bus schedules for your transportation needs from home to your child care facility, to school, and to work. Bring a schedule in.

b. Figure out how many transfers you would have to make. __________

Also, how close does the bus go to your intended destination? _____________________________________

c. How much will the bus cost per day? __________________

d. How long will the bus ride be? ______________________

e. Complete this statement: The bus stops __________ block(s) from my child's daycare facility. It will take me __________ minutes to walk from the bus stop to the facility. It will take me __________ minutes to get my child(ren) settled down at child care. It will take me __________ minutes to walk back to the bus stop. I have exactly __________ minutes to accomplish this between buses.

f. Complete this statement: The bus stops __________ block(s) from my job. It will take me __________ minutes to walk from the bus stop to my workplace.

g. Complete this statement: The bus stops __________ block(s) from my school. It will take me __________ minutes to walk from the bus stop to my school.

h. Do you regularly ride public transportation (bus or train)?

Yes ( ) No ( )

____________ 4. If you are planning to rely on family or friends:

a. Get a written statement of commitment from the family member or friend. The reason for getting the written statement is so that you can tell whether or not the person is serious about driving you. If s/he won't sign a paper, you may want to rethink relying on this person. You must bring in the written statement.

b. On a scale of 1-10, with 10 being "very reliable," how reliable is the person you will be riding with? __________

c. Using the same scale,

How reliable is his/her transportation? __________

What make/year is the car? __________________________

How many miles is on the car? _______________________

d. What is your relationship with this person?

____

e. Will this person be making a special trip just to take you?

Yes ( ) No ( )

f. Is this person willing to pick you up as early as 8:00 a.m.?

Yes ( ) No ( )

g. Will you have to pay this person to give you a ride?

Yes ( ) No ( )

__________ 5. Since often the primary transportation plan does not work out, what would be a good back-up plan for you?

____

____

__________ 6. Often, school is not provided in the local community; therefore you will need to decide how many minutes you are willing to travel for school and to go to work. Which towns/areas would you be willing and able to commute to?

____

____

____

__________ 7. If you have determined that you have transportation problems, what would need to be done to solve these problems?

____

____

____

HOW WILL YOU DO ALL OF THIS IN ONE DAY?
Time Management

TIME MANAGEMENT

Instructions: Attending school will require many hours of your day. You will need to reserve time to attend class, prepare for class and get yourself to and from class. You may also have to get children ready for their day before you go to class and get yourself to and from work. This worksheet will help you plan your day. There is a list of numbered decision items for you to consider and when each is completed a date should be entered.

Date Completed **Decision Item**

1. Attached are two schedule sheets. First fill one out so that it shows what your typical day is like now. Fill in when you work, sleep, clean, eat, watch TV, run errands, get out of bed, go to bed, socialize, prepare meals, etc.

_____________ 2. Using the second schedule sheet, fill out a schedule which shows what your life would be like if you were in school. Use the following instructions:

Assume training begins at 8:00 a.m. and ends at 5:00 p.m.

______ a. Working backwards from 8:00 a.m., log the total time it will take you to drive or take a bus from child care to school or work.

______ b. Working backwards from item A, log the total time it will take you to drive or transport your child(ren) from home to child care. (You should now see what time you need to leave the house each morning. If you do not know, use 1 hour.)

______ c. Still working backwards fill in the schedule with the time it will take you to get dressed, get your children dressed, pack a lunch, and pack your children's lunch. (Your schedule should now show what time you'll need to wake up.)

______ d. Assuming you need to sleep between 6.5-8.5 hours each night, use the log to calculate what time you'll need to go to bed.

______ e. Log the total time it will take you to get between school and work.

_______ f. Starting with 5:00 pm, log the amount of time it will take you to get home from school or work. If you don't know, use 1 hour. If you have children, include travel time to and from child care.

_______ g. Log the time it will take you to prepare dinner, eat, and clean up.

_______ h. Log any hours you help children with homework and/or studies.

_______ i. Log the average amount of time you'll need to bathe the children, and prepare them for bed.

_______ j. Log the time you need to shop, run errands, clean, do laundry, and other chores.

_______ k. Log the time you need to do homework and for leisure activities such as watching TV, reading, calling friends, exercising, etc.

_______ l. Log any additional responsibilities you have that will require time.

_______ m. Other obligations:

____

__________ 3. Compare your current schedule to your school plus work schedule. What are some of the trade-offs and sacrifices you'll have to make to do well in school and on the job?

____

____

__________ 4. After reviewing your schedule, do you have any concerns about being able to manage everything that will need to be done?

Yes ( ) No ( )

SAMPLE 24-HOUR DAY TRAINING SCHEDULE

12 midnight ***Sleep*** 12:15 a.m.	6:00 a.m. ***get up*** 6:15 a.m. ***get kids up***	12 noon 12:15 p.m. **JOB**	6:00 p.m. 6:15 p.m. ***eat***
12:30 a.m. 12:45 a.m.	6:30 a.m. ***shower*** 6:45 a.m. ***dress***	12:30 p.m. 12:45 p.m. **JOB**	6:30 p.m. ***clean up kitchen*** 6:45 p.m.
1:00 a.m. 1:15 a.m.	7:00 a.m. ***pack lunches*** 7:15 a.m. ***eat***	1:00 p.m. 1:15 p.m. **JOB**	7:00 p.m. ***help kids with*** 7:15 p.m. ***homework***
1:30 a.m. 1:45 a.m.	7:30 a.m. ***drive to SCHOOL*** 7:45 a.m.	1:30 p.m. 1:45 p.m. **JOB**	7:30 p.m. 7:45 p.m.
2:00 a.m. 2:15 a.m.	8:00 a.m. **SCHOOL** 8:15 a.m.	2:00 p.m. 2:15 p.m. **JOB**	8:00 p.m. ***give kids bath*** 8:15 p.m.
2:30 a.m. 2:45 a.m.	8:30 a.m. 8:45 a.m. **SCHOOL**	2:30 p.m. 2:45 p.m. **JOB**	8:30 p.m. *put kids to bed* 8:45 p.m.
3:00 a.m. 3:15 a.m.	9:00 a.m. 9:15 a.m. **SCHOOL**	3:00 p.m. 3:15 p.m. **JOB**	9:00 p.m. 9:15 p.m.
3:30 a.m. 3:45 a.m.	9:30 a.m. 9:45 a.m. **SCHOOL**	3:30 p.m. 3:45 p.m. **JOB**	9:30 p.m. ***relax*** 9:45 p.m.
4:00 a.m. 4:15 a.m.	10:00 a.m. 10:15 a.m. **SCHOOL**	4:00 p.m. 4:15 p.m. **JOB**	10:00 p.m. ***get ready*** 10:15 p.m. ***for bed***
4:30 a.m. 4:45 a.m.	10:30 a.m. 10:45 a.m. **SCHOOL**	4:30 p.m. **JOB** 4:45 p.m.	10:30 p.m. ***sleep*** 10:45 p.m.
5:00 a.m. 5:15 a.m.	11:00 a.m. 11:15 a.m. **SCHOOL**	5:00 p.m. ***leave Job*** 5:15 p.m. *drive home*	11:00 p.m. 11:15 p.m.
5:30 a.m. 5:45 a.m.	11:30 a.m. 11:45 a.m. *drive to JOB*	5:30 p.m. ***make dinner*** 5:45 p.m.	11:30 p.m. 11:45 p.m.

YOUR CURRENT 24-HOUR DAY SCHEDULE

12 midnight 12:15 a.m.	6:00 a.m. 6:15 a.m.	12 noon 12:15 p.m.	6:00 p.m. 6:15 p.m.
12:30 a.m. 12:45 a.m.	6:30 a.m. 6:45 a.m.	12:30 p.m. 12:45 p.m.	6:30 p.m. 6:45 p.m.
1:00 a.m. 1:15 a.m.	7:00 a.m. 7:15 a.m.	1:00 p.m. 1:15 p.m.	7:00 p.m. 7:15 p.m.
1:30 a.m. 1:45 a.m.	7:30 a.m. 7:45 a.m.	1:30 p.m. 1:45 p.m.	7:30 p.m. 7:45 p.m.
2:00 a.m. 2:15 a.m.	8:00 a.m. 8:15 a.m.	2:00 p.m. 2:15 p.m.	8:00 p.m. 8:15 p.m.
2:30 a.m. 2:45 a.m.	8:30 a.m. 8:45 a.m.	2:30 p.m. 2:45 p.m.	8:30 p.m. 8:45 p.m.
3:00 a.m. 3:15 a.m.	9:00 a.m. 9:15 a.m.	3:00 p.m. 3:15 p.m.	9:00 p.m. 9:15 p.m.
3:30 a.m. 3:45 a.m.	9:30 a.m. 9:45 a.m.	3:30 p.m. 3:45 p.m.	9:30 p.m. 9:45 p.m.
4:00 a.m. 4:15 a.m.	10:00 a.m. 10:15 a.m.	4:00 p.m. 4:15 p.m.	10:00 p.m. 10:15 p.m.
4:30 a.m. 4:45 a.m.	10:30 a.m. 10:45 a.m.	4:30 p.m. 4:45 p.m.	10:30 p.m. 10:45 p.m.
5:00 a.m. 5:15 a.m.	11:00 a.m. 11:15 a.m.	5:00 p.m. 5:15 p.m.	11:00 p.m. 11:15 p.m.
5:30 a.m. 5:45 a.m.	11:30 a.m. 11:45 a.m.	5:30 p.m. 5:45 p.m.	11:30 p.m. 11:45 p.m.

Tool 2g. Income Improvement Orientation Binder

Instructions: Included in the Orientation Binder is a wide range of one-page handouts or fliers that can be used during the initial orientation to the program to sell the program benefits. Each flier highlights a different benefit of the program, such as the jobs clients are in, the wages clients are earning, the types of education and training clients are enrolled in, and illustrations of how the program can benefit the client's pocketbook and family. Whether your program does one-to-one or group orientations, program staff should pull fliers from this Orientation Binder that reinforce how the program will solve the client's problem.

These fliers serve as samples that can be adapted for your local area. Staff should give some fliers to the clients to take home so that they can also sell the program to their family, friends and others whose support will be important if the clients are to be successful. Not only should the fliers be used continuously to sell the program benefits to the client, but also the fliers can be used by the client to sell the program benefits to their support network.

Income Improvement Orientation Binder

Get a Bigger Paycheck

and New Skills!

You Gota Job, Inc.
123 Check Road
Successful, MD 10000

Bank of Success

Check No. 200200200
Date 4/1/2002

Pay to the
Order Of Joe Employee

$640.80

Six Hundred Forty Dollars and 80/100 Dollars

John Q. President

||A 002456||A |П 865000131|П 9

00165443||≈

Benefits <u>YOU</u> Can Get From The ERA Program!

5 **More Money**

5 **Flexible Hours**

5 **A Benefits Package**

5 **A Job You Love**

5 **More Hours**

5 **Promotions**

5 **A Great Boss**

Who's Who In Hiring ERA Program Participants

Dravo Chemical
Good Fellows
United States Steel
Holiday Inn International
Sam's Club
Waynesburg Hospital
Jefferson Central School District
Bell-Atlantic Telephone
Office Max
Donora Lumber
St. Cloud Nursing
Dollar Rent A Car
BB McCormick Roofing & Sheet Metal Co.
Stanley Steemer Carpet Cleaner
Goodwill Industries
Valencia Community College
Home Depot
Banyan Construction & Development Inc.
Southeast Landscaping And Irrigation Inc.
Herrell Plumbing
Discount Auto Parts Automax
Automotive Group Inc. Department
of Parks and Recreation

What are ERA Program Participants Earning?

$ 6.50	Child Care
$ 9.25	Switchboard
$10.00	Clerical
$ 9.75	Landscaping
$ 8.50	Retail
$ 9.25	Retail
$ 6.50	Child Care
$ 8.75	Clerical
$12.00	LPN Nursing
$ 7.50	Hospitality
$ 7.00	Child Care
$ 8.50	Janitorial Services
$11.00	Mechanic
$ 6.50	House Keeper
$ 9.75	Warehouse Worker
$ 7.50	Phone Solicitor
$ 7.00	Baggage Handler
$ 7.35	Cashier
$ 7.75	Secretarial

Turn Your Job into a

Higher Paying Job

WE CAN HELP!

House Keeper	To	<u>Floor Supervisor</u>
Floor Supervisor	To	<u>Head Of Housekeeping</u>
Child Care	To	<u>Teacher's Aide</u>
Nurse's Aide	To	<u>LPN</u>
LPN	To	<u>RN</u>
Clerk	To	<u>Assistant Manager</u>

[illegible] Moving Up

Means Changing Jobs

Here's what you could be:

Account Clerk
Bank Clerk
Bookkeeper
Building Maintenance Worker
Date Entry Clerk
Dental Assistant
Electrical Assistant
Field Service Representative
Grounds Maintenance Personnel
Lawn Service Worker
Quality Control Technician
Receptionist
Secretary
Tree Trimmer
Veterinary Assistant
Word Processing Operator

Job Openings

MANAGEMENT TRAINEE: Large department store is looking for someone to be a management trainee in the ladies department. Hours are 9:00 AM to 5:00 PM. Five days a week and every other Saturday. Located in Annapolis on major bus route. Will train, no experience necessary. Must be neat and have no shoplifting violations. $5.00/hour to start; Raise at 90 days.

WAREHOUSE WORKER: Lumberyard looking for person able to lift heavy boxes off trucks onto loading dock. Forklift experience a plus. Hours 7:00 AM to 3:30 PM Sunday through Thursday. $6.00/hour plus overtime. Benefits after 6-month probation period.

COUNTER CLERK: Counter Clerk position at local restaurant. Must be able to work flexible **FILLED!** gewater Area. $5.50/hour plus good tips to start.

LANDSCAPING: Spring, Summer, and Fall position for someone who likes the outdoors. Will train the right person. Growing business in the Severn Area. Must be 18 or over and have a valid driver's license. Pay between $5.15 and $5.75 to start.

AUTO MECHANIC: Arlington area garage needs three mechanics. Must be State certified and have at least one year experience. $8.00/hour; benefits after 90 days.

NURSE'S AIDE: A chance to turn caring into a career. Local nursing home needs a Nurse's **FILLED!** de to help care for the elderly. Looking for warm, g person who likes people. Must be physically fit. $5.25/Hour plus medical benefits.

SALES CLERK: Work as a Sales Clerk in a large retail children's store. Knowledge of children's items helpful, but not necessary. Prefer **FILLED!** meone with cash register experience. Hours are but between 10:00 AM and 5:00 PM Weekdays and 9:00 AM and 9:00 PM Saturdays. $5.00/Hour to start. Guaranteed 40-hour week.

What Others Have Said:

"With this program, I went from a job paying $7.00 per hour to a job paying $9.50 per hour. I didn't think it was possible."

"Thanks to TAG I found a job that had better hours so I could spend more time with my daughter. Best of all I can earn more money."

"ERA helped me get my diploma. I needed the diploma to get a better job. I am so glad I followed their advice!"

CLIENTS WE HAVE HELPED GET JOBS

NAME:	MARY RICHARDS
AGE:	21
HOMETOWN:	CAPITAL CITY, WA
DATE ENTERED TCU:	DECEMBER 1997
DATE PLACED ON JOB:	MAY 1999
EMPLOYER:	U.S. DEPT. OF TRANS.
POSITION:	CLERK TYPIST
SALARY:	$14,300 A YEAR

NAME:	TAMARA JONES
AGE:	20
HOMETOWN:	METROPOLITAN AREA, NY
DATE ENTERED TCU:	AUGUST 1997
DATE PLACED ON JOB:	APRIL 1999
EMPLOYER:	EQUIFAX CORP.
POSITION:	TELEPHONE CONSOLE OPER.
SALARY:	$14,300 A YEAR

NAME:	DEBBIE BROWN
AGE:	24
HOMETOWN:	SMALL TOWN, TX
DATE ENTERED TCU:	OCTOBER 1997
DATE PLACED ON JOB:	MAY 1998
EMPLOYER:	PRACTICAL SOLUTION
POSITION:	ADMIN. ASSISTANT
SALARY:	$15,000 A YEAR

NAME:	LINDA TAYLOR
AGE:	24
HOMETOWN:	RURAL COMMUNITY, GA
DATE ENTERED TCU:	JULY 1996
DATE PLACED ON JOB:	AUGUST 1997
EMPLOYER:	ATLANTA POLICE DEPT.
POSITION:	DATA ENTRY/CLERK TYPIST
SALARY:	$15,000 A YEAR

CLIENTS WE HAVE HELPED GET JOBS

NAME:	LISA JOHNSON
AGE:	24
HOMETOWN:	URBAN CENTER, LA
DATE ENTERED TCU:	OCTOBER 1998
DATE PLACED ON JOB:	MARCH 1999
EMPLOYER:	FEDERATION OF TEACHERS
POSITION:	SECRETARY
SALARY:	$15,000 A YEAR

NAME:	JANE WILLIAMS
AGE:	24
HOMETOWN:	SMALL TOWN, OH
DATE ENTERED TCU:	JUNE 1998
DATE PLACED ON JOB:	MARCH 1999
EMPLOYER:	EQUIFAX CORP.
POSITION:	DATA ENTRY OPER.
SALARY:	$13,000 A YEAR

NAME:	KIM SMITH
AGE:	22
HOMETOWN:	CAPITAL CITY, MA
DATE ENTERED TCU:	MAY 1998
DATE PLACED ON JOB:	MAY 1999
EMPLOYER:	AMTRAK
POSITION:	RESERVATIONIST
SALARY:	$18,000 A YEAR

NAME:	JUDY DANIELS
AGE:	22
HOMETOWN:	URBAN CENTER, MI
DATE ENTERED TCU:	JUNE 1996
DATE PLACED ON JOB:	AUGUST 1997
EMPLOYER:	AT&T COMMUNICATIONS
POSITION:	DATA ENTRY OPER.
SALARY:	$13,500 A YEAR

CLIENTS WE HAVE HELPED GET JOBS

NAME:	MELISSA MOORE
AGE:	20
HOMETOWN:	METROPOLITAN AREA, IL
DATE ENTERED TCU:	FEBRUARY 1998
DATE PLACED ON JOB:	FEBRUARY 1999
EMPLOYER:	U.S. DEPT. OF LABOR
POSITION:	CLERK TYPIST
SALARY:	$14,000 A YEAR

NAME:	AMANDA DAVIS
AGE:	22
HOMETOWN:	URBAN CENTER, CA
DATE ENTERED TCU:	DECEMBER 1997
DATE PLACED ON JOB:	DECEMBER 1998
EMPLOYER:	NORFOLK / SOUTHERN
POSITION:	CODE CLERK
SALARY:	$19,000 A YEAR

NAME:	KRISTIN PETERS
AGE:	25
HOMETOWN:	SMALL CITY, FL
DATE ENTERED TCU:	JULY 1997
DATE PLACED ON JOB:	MAY 1998
EMPLOYER:	STATE OF GA MEDICAL
POSITION:	DATA BASE RECIPIENT
SALARY:	$16,000 A YEAR

NAME:	PAULA JACKSON
AGE:	21
HOMETOWN:	RURAL COMMUNITY, KY
DATE ENTERED TCU:	APRIL 1998
DATE PLACED ON JOB:	APRIL 1999
EMPLOYER:	EQUIFAX SERVICES
POSITION:	DATA ENTRY ACCOUNTING
SALARY:	$14,000 A YEAR

EARN MORE MONEY ON THE JOB

- Offer skills that employers pay for
- Ask for a raise
- Earn a pay increase
- Get promotions on the job
- Increase your hours on the job
- Move up, make more
- Increase your take home pay by legally paying less taxes

HOW TO PICK A HIGH-DEMAND, HIGH PAYING CAREER THAT IS RIGHT FOR YOU!

The ERA Program Can Help You:

- See if working for yourself is the job for you.
- Find out the 7 Steps to career-decision making.
- Learn about high-demand, decent paying jobs: What are they? What's growing? What's not?
- Decide on a career: How to pick. Where to start.

CALL JULIA TODAY TO GET STARTED!
1-800-123-4567

Which One of These Schools Do You Want to Go to?

- Hood Community College
- Salem School of High Technology
- Washington Clerical Training
- Atlas Trucking

A diploma from one of these schools can increase your income!

A High School Diploma:

Opens Doors

Gives Choices

Earns You More Money

What's A Diploma Worth?

$245,000

Education Means Better Jobs

Classifieds

THE GAZETTE

Help Wanted

Graduating Can Mean a Lot to Your Children

When you do this…

They'll do this!

Get One-On-One Services Designed Around You!!

- Develop a plan to meet your job goals.
- Make a financial plan.
- Map your career plan.
- Find job leads and job referrals.
- Survive on the job.
- Get Financial Help

  Help with transportation
  Help with childcare
  Extending your medical benefits
  Tools, uniforms, and equipment for your job

Chapter 3: Retention

Retention in the ERA project is the ability to keep a job or to remain attached to the labor market. As clients enter the labor market for the first time or after a long break, they are faced with many new challenges. ERA programs seek to reduce clients' barriers to retention and support them as they stabilize in the job and eventually explore pathways to advancement. We expect that the majority of staff's work with clients will focus on job retention and ensuring that the client remains employed. However, this should not be offered without some attention to advancement activities. Retention and advancement activities should be delivered simultaneously but with a shifting focus depending on the client's employment record. Chapter 3 includes three tools to help staff deliver retention services.

Tools the staff can use:

- 3a. Passport to the Future
- 3b. Work Supports Checklist
- 3c. Job-Readiness Package (includes child care, transportation, budgeting, and time management units)

Other resources to add to your toolkit:

- Supportive Services Questionnaire or Client Needs Checklist.
- In-house Directory of Supportive Service Resources.
- Information on the range of work supports available to working families.

    - For example, go to the "Making Wages Work" section of the website www.financeprojectinfo.org/mww/index.asp for a good overview of potential income supports.
    - Another resource is www.govbenefits.gov, which is a screening tool to help identify government benefits that a client might be eligible to receive.

- Income Calculator to determine what benefits people gain/lose when they work or get higher pay.
- www.cbpp.org/eic2003/index.html This site by the Center on Budget and Policy Priorities provides background information on the Earned Income Tax Credit.

Manager's Checklist:

- ⑨ Are staff following a protocol or process for contacting clients to ensure job retention? Is the contact frequent and intensive after the client has begun to work?
- ⑨ Are staff contacting the employer to get his/her perspective on the client's performance?
- ⑨ Do clients have written transportation plans, child care plans, budgets and time management plans developed before they accept a job?
- ⑨ Are staff providing, either directly or through referrals, the level of supportive services needed to help clients keep jobs?
- ⑨ Are staff working with clients on financial literacy issues? For example are staff conducting budgeting exercises with clients? Are staff discussing the importance of having a savings plan (individual development accounts)?
- ⑨ Are staff working with clients to be sure they are getting all of the temporary work supports for which they may be eligible. For example, child care assistance, Earned Income Tax Credit, Food Stamps, health care insurance for low-income working parents, health care insurance for children in low-income families, and housing assistance?
- ⑨ Are staff working with clients to help them see how the current job is a step towards the client's "field of fascination?"[3] Does the current job relate to the client's goals?
- ⑨ Do you see evidence that when a problem is identified the client and staff create a clear plan to resolve it? Is the plan more than the case manager simply talking to the client about the issue? Are there behaviors identified and strategies developed to solve the problem?
- ⑨ Are staff quick to identify those clients who are having problems on the job so problems can be solved before the client quits?
- ⑨ If pre-employment workshops are offered, is a substantial portion of the training dedicated to teaching retention and advancement skills?

[3] "Field of fascination" is a term used by WorkNet Training & Publications to describe the industry or area that best matches the client's interests, utilizes the skills she loves to use, and helps her attain her personal goals. It is similar to the concept of a "dream job."

Tool 3a. Passport to the Future

Introductions: The Passport to the Future is a roadmap on how to be a good employee and a motivational tool to be given to the client. It includes the client's goals and expectations and checklists to help them become good employees. The program staff and the client should complete the goal setting sections jointly. These should serve as a reminder to the client of what is most important to them and why working is part of achieving their life goals.

The other sections focus on behaviors and skills that good employees demonstrate. Each of these 12 sections includes a list of activities that the client can do to demonstrate that behavior on the job. Once the client does each activity, they can check the box next to it. The Passport is particularly useful as program staff advise clients on how to be good workers since it outlines very specific ways s/he can show behaviors that may not be well understood. For example, the Taking Initiative section lists activities such as, accepted tasks other than what is required, asking for extra work when not busy, etc.

The passport is a living document that the client and program staff should discuss during each meeting to understand how the client is adjusting to the job and laying a solid foundation for any future promotion opportunities.

To create the Passport, simply print the following pages double – sided, cut them in half, and staple to create a booklet.

Socially Appropriate Behavior

- Talked without using swear words, sexual or suggestive language.
- Discussed work at work. Resisted discussing personal problems/life at work, except during breaks and lunch.
- Avoided topics of sex, drugs, alcohol and related activities. Discussed only those topics I'd talk about in from of my grandmother, elder of my church or teacher.
- Avoided racial, ethnic, sexual or derogatory jokes.
- When confronted with a co-worker who is sharing gossip, inappropriate jokes or conversation, I changed the subject or walked away and went back to work.
- Got sleep at home, not at work/school.
- Brushed teeth/flossed following meal rather than picking my teeth.
- Maintained 18" to 4' distance when conversing with others.
- Maintained eye contact when talking to others.
- Used "please" and "thank you" when making requests.

Teamwork Skill

- Offered positive suggestions during group discussions.
- Participated in teamwork activities.
- Offered to do what is at minimum my share.
- Asked others if they believe I've accepted my share of the task.
- Listened to others discuss their ideas.
- Outlined 3 reasons a team player may be acting in a strange way. Instead of jumping to immediate conclusions.
- Worked to meet a group goal.
- Did team task even when repetitious and boring.
- Acted cheerful even when the task/plan wasn't going how I wanted.
- Argued for my point of view, but did not refuse to contribute. Acted pleasant even if the group didn't accept my recommendation.
- Found a solution to a problem and avoided complaining and placing blame.
- Remained calm and asked questions during a disagreement.
- Participated in a team project and allowed the group to take credit.
- Explained correct procedures to new employee.

I have completed the following units:

- Child Care
- Transportation
- Budgeting
- Time Commitment
- Income Improvement Plan

My life goals are as follows:

____

____

____

____

____

____

____

____

____

____

My Career Goals
My area of fascination is:

___

Why I want to be thought of as a good worker:

___

___

___

___

___

___

___

___

___

___

___

___

___

Communication Skills

- Called employer to communicate an issue (i.e. tardiness, absence, schedule conflict)
- Wrote a letter or memo that is legible.
- Paraphrased what someone just said. Repeated it back to be sure I heard correctly.
- Established eye contact during a conversation.
- Gave directions to someone on how to do a task or drive to a location.
- Regulated tone of voice so it wasn't revealing contempt, sarcasm, disrespect, or disgust during an argument.

Taking Initiative

- Suggested a better, faster, less costly way of doing work during class or at work.
- Asked for extra work when not busy.
- Helped a co-worker/fellow student do part of his/her job when my task was completed or his was more urgent.
- Stayed busy with work assignments.
- Accepted tasks other than what was required.
- Asked if co-worker/fellow student needed help before s/he asked me.
- Offered to take part of absent worker's task.
- Took additional training related to my job.

Willingness to Accept Responsibility

- When I made an error, I admitted the mistake immediately and asked what to do to fix the problem.
- Used common resources as though they were mine.
- Did every task to the best of my ability. If it was sub-standard, then I re-did it.
- Completed tasks without supervision.
- Completed assignments on or before the due date even if it meant working extra hours
- Came to work even when problems arose. (sick, personal issues). Demonstrated that work is a priority.
- Called work even during off time to remind them of something that needs to be done/ordered/fixed.
- Pointed out something that if not fixed would cause a disruption in work.
- Found a replacement for myself before I asked for time off.
- Notified supervisor in advance of any delays to the project/task deadline

Following Instructions

When receiving verbal instructions from my supervisor:

(a) Listened carefully
(b) Maintained eye contact
(c) Wrote down the instructions or took notes
(d) Asked questions even if I did understand – just to be sure
(e) Stated what I understood the instructions to be and summarized what I heard.

When receiving written instructions from my supervisor:

(a) Read through instructions before proceeding
(b) Re-read instructions out loud until they were clear and understood
(c) Reworded instructions in language that was easy to remember
(d) Asked questions when in doubt
(e) Asked questions if not in doubt – just to be sure

Observed others who were doing the same task.

Did a task or solved problem. Asked supervisor to double check work if I was unsure if I was doing it correctly.

Personal Appearance

- Asked for dress code and an explanation of any items I was not sure about.
- Asked about accessories (i.e. nose rings, beepers, earrings, body piercing and tattoos)
- Went to work with clean, styled hair. Clean nails. Brushed teeth.
- Bathed daily either prior to bed or prior to work.
- Wore clean clothes that were free of wrinkles, holes and offensive odors such as smoke, body odor, mildew and excessive cologne.
- Wore an underarm deodorant every day.
- Used only a small amount of perfume or cologne because many people may be allergic to the smell.

Time Use and Planning Skills

- Made a "to do" list and included appointments.
- Highlighted the items that were the most urgent.
- Prioritized the "urgent" items.
- Developed a calendar of the items I plan to do and on which day I plan to do them. Tried to note which items I plan to complete in the AM and in the PM.
- Grouped tasks according to location, chronology, time of day, or importance.
- Gave tasks to others once I figured out who else could do the task. Delegated.
- Reviewed "to do" list with supervisor. Asked for input.
- Limited phone calls and interruptions. Worked to get priority list accomplished.
- Added new tasks to the list.
- Completed tasks more quickly than planned. Worked on working faster.

Positive Attitude

- Smiled at co-workers and customers.
- Greeted co-workers with “Good morning”, “Hi”, “How are you today”, or some other similar greeting.
- Accepted unpleasant tasks. Made a positive statement such as “I will”, “I can”, “I’ll try”, or “No problem”.
- Expressed my positive qualities such as “I am good at.....”, “Something I do well is.....”, “I have a talent for.....”
- Accepted criticism without being defensive. “Thank you for your feedback”, “I’ll consider what you’ve said”, “Help me think through how to change that.”
- Used body language that showed enthusiasm. Stood straight Sat up. Established eye contact. Avoided eye-rolling and heavy sighing
- Used a tone of voice when speaking to others that was not sarcastic, loud, or negative.
- Spoke highly of the class/company.

Accepting Supervision

- Asked questions after a supervisor gave me a task even if I thought I understood it.
- Listened carefully and repeated the instructions as I understood them “You’d like me to......”.
- While completing a task, stopped in the middle and checked with the supervisor to make sure it’s being done correctly.
- Asked how to fix anything that’s been done incorrectly. Asked how to prevent errors in the future.
- When given a task, establish eye contact. Nodded as instructions were given to demonstrate that I am paying attention.
- Asked supervisor the priority of the task being assigned. If it is high priority, did it immediately.
- Accepted and completed additional tasks without complaining to supervisor or co-workers.
- Showed loyalty to supervisor by not putting down a boss to co-workers and members of the community.
- Asked supervisor for feedback on my work. If suggestions were made, I did them.
- Asked supervisor for a performance review so I could improve my skills.
- Supported and implemented supervisory decisions even if I disagreed.
- Provided information to the supervisor that s/he needed when given an assignment

Punctuality and Attendance

- Asked employer precise starting time.
- Developed a schedule to determine what time I needed to wake up to make it to work 15 minutes early. Included time to dress, getting child up and ready, time for travel and for emergencies or unexpected occurrences.
- Bought an alarm clock with a back-up battery and learned how to use it.
- Practiced the process from wake-up to arrival at work at least 4 times before the start date.
- Used the 15 min. I’ve arrived prior to start time to organize my work and supplies, get coffee, and socialize.
- Bought a wristwatch and wore it.
- Asked to make up time, when I was late.
- Called to say I would be late or absent prior to my start time.
- Arrived from breaks and lunches on time.
- Prepared for the next day the night before. Packed lunches, picked out and ironed clothes, got gasoline, set alarm.
- Got to bed 7-8 hours prior to my wake-up time.
- Created and used back-up plans for daycare, transportation, sick children.
- Got to work except in the event of my own death, immediate family member’s death, jail, or hospital.
- Reschedule appointments that interfere with work.

Getting Along with Co-Workers

- Planned an outside activity with a co-worker. For example: Went to lunch with a co-worker.
- Greeted co-workers each day with a smile.
- Found at least two occasions to compliment a co-worker.
- Helped a co-worker with his/her job before being asked to help.
- Offered to help a co-worker with whom I’ve had a past problem.
- Took blame for something a co-worker and I messed up. Didn’t point to or blame the co-worker.
- Did whatever work needed to be completed on my shift so co-workers didn’t have to make up for the work I didn’t complete.
- Continued on task even when a co-worker wasn’t working at an equal level.
- When a co-worker asked me to do something and I had “too much on my plate”, politely said “no” and explained why.
- When people gossiped about a co-worker, I left the conversation or changed the subject.
- Used only my own supplies and tools. If I needed to borrow, asked prior to using it, and returned it immediately.
- Introduced self to new student/employees.

Photo

Name

Address

City, State, Zip Code

Phone Number

Tool 3b. Work Supports Checklist

Sometimes when a client gets a job, she/he will need some temporary support until they start earning more. There are a range of work supports available (child care subsidies, transportation assistance, Food Stamps). Work supports are often administered by a number of different agencies (welfare, employment services, etc.) and eligibility criteria, applications and application processes can also be different for each work support. You will need to gather information about your local area to make sure you are aware of the types of supports that are available if a client needs them. In order to do this, program staff will have to know the following information for each work support:

- Which agency administers the support?
- What are the eligibility criteria for applicants?
- Where do clients get applications?
- What is the application process?
- What documents, if any, are needed for application?
- What documents, if any, are needed to maintain eligibility for this program?

These additional benefits can make all the difference when a client is considering the importance of keeping his/her job.

Possible work supports include:

- Child Care Tax Credits
- State Earned Income Tax Credits
- Federal Earned Income Tax Credits
- Transportation
- Health Insurance
- Child Health Insurance
- Housing Programs and Assistance
- Nutrition Programs
- Food Stamps
- Child Care Assistance

Tool 3c. Job Readiness Package

Instructions: As clients move into jobs, their lives can become much more difficult to manage. For some, the logistics and coordination can be overwhelming and lead to job loss. This Job Readiness Package includes a set of four planning exercises to assist the client as they juggle work and family. This tool is very similar to the Education and Training – Readiness Package (Tool 2f), but it is focused on just returning to work. Front line staff should work with clients to complete each unit as h/she prepares to begin a job. Each unit will address a different area in the client's life that could become a reason to quit the job. These units are:

- Budgeting
- Child Care
- Transportation
- Time Management

HOW WILL YOU SURVIVE?

Budgeting

BUDGETING

Instructions: When you first get a job you will need to figure out how to budget the money you make. Use this worksheet to help you plan your initial budget as we work to help you increase your income. There is a list of numbered decision items for you to consider and when each is completed a date should be entered.

Date Completed **Decision Item**

_____________ 1. Add together your sources of income.

PRESENT FINANCIAL ASSISTANCE	CURRENT $ PER MONTH
1. Income from present job	
2. Income from odd jobs	
3. Gifts/loans from others	
4. Welfare assistance	
5. Food Stamps	
6. Other	

NO COST SERVICES	$ PER MONTH
1. Medical assistance	
2. Child care	
3. Housing assistance	
4. Free lunch program	

TOTAL INCOME: $____________

_____________ 2. Make a list of your expenses.

COST OF LIVING	CURRENT $ PER MONTH
Rent	
Electric	
Gas	
Water	
Sewage/Garbage	
Telephone	
Food	
Clothing	
Transportation	
Laundry	
Medical/Dental	
Cable TV	
Newspaper	
Credit Card Payments	
Auto Insurance	
Other Insurance	
Child Care/Child Support	
Gasoline	
Miscellaneous	

TOTAL EXPENSES: $____________

______________ 3. Do you have other financial resources (a working spouse, parental assistance, a savings account, a friend)?

Yes ( ) No ( )

______________ 4. Are your bills more than your income?

Yes ( ) No ( )

WHO WILL TAKE CARE OF YOUR KIDS?
Child Care

CHILD CARE

Instructions: Part of your decision to go get and keep a job may depend on finding child care with which you are comfortable. As you explore the child care in the area, you may find a variety of options. To help you determine which is the best option for you we have prepared the following worksheet. Completing it will help you decide which option feels the most comfortable for you. There is a list of numbered decision items for you to consider and when each is completed a date should be entered.

Date Completed **Decision Item**

_____________ 1. Ask relatives and friends whether they would be willing to watch your child(ren) while you are at work. Let them know that you may be at work up to 8 hours a day.

Name two people you asked: ____________________________

____

NOTE: Even if a family member or friend agrees to watch your child, you must complete all remaining items.

_____________ 2. If a friend or relative agrees to watch your child(ren), then get a written statement from them saying that s/he agrees to watch the child(ren) during work hours. The reason for getting a written statement is so that you can tell whether the person is serious about helping you. If s/he won't sign a paper, you may want to rethink relying on this person. <u>You must bring in this written statement</u>.

_____________ 3. Contact Headstart to get information. Get on their waiting list, if possible.

Name of person you spoke with: _________________________

Phone # ________________

If your child is 5 years or older, write N/A next to item 3.

_____________ 4. Contact the Child Care Resource and Referral agency to get information.

Name of person you spoke with: ________________________

_____________ 5. Gather information on two child care facilities in the area, other than family friends. Complete the attached Child Care Facility Information Sheet on each facility. Call only licensed facilities.

_____________ 6. Estimate the weekly cost of meeting your child care needs. The child care provider must be at least 18 years old and not your parents to be considered for payment.

Estimated cost: $ ___________________

_____________ 7. Based on the information you have obtained, determine which type of child care you desire:

( ) Friend/relative/unlicensed
( ) Licensed facility
( ) Headstart
( ) Pre-school
( ) Other ______________________________

_____________ 8. If enrolled, whom would you choose as your primary child care provider?

____

_____________ 9. What is your alternate plan in case the primary plan does not work out?

____

_____________ 10. What is your emergency plan for when the child(ren) is ill and cannot go?

____

____

_____________ 11. What is your plan for getting your child(ren) to child care?

____

_____________ 12. Are you ready and willing to leave your child(ren) with your primary provider?

( ) Yes
( ) No
( ) Not sure

_____________ 13. Are you ready and willing to leave your child(ren) with your alternate or emergency provider?

( ) Yes
( ) No
( ) Not sure

CHILD CARE FACILITY INFORMATION SHEET

(put two of these in packet)

Instructions: This form is not for use with a family member or friend but only for a child care facility. It must be completed whether or not you intend to use this facility.

1. Name:

2. Address:

3. Phone:

4. Hours of operation:

5. Age range of children accepted?

6. Does the provider allow for overtime hours?

7. How much advance notice does the provider need for overtime hours?

8. Can the facility accept ill children?

9. Which meals are provided?

10. Are there educational activities that the children can do?

11. How many other children are at this facility?

12. What is the availability of slots?

13. Does this facility offer occasional drop-in services? If so, at what cost?

14. What are the regular hourly, daily, or weekly costs?

15. What is the payment schedule (daily, pre-paid, weekly, monthly)?

16. What are the overtime rates?

17. Is there a special rate for infants? If so, how much?

18. Is there a discount for a second or third child?

19. Do you do reference checks on staff?

20. Do you encourage drop-in visits?

Other comments:

HOW WILL YOU GET TO WORK?
Transportation

TRANSPORTATION

Instructions: You will need to think about how you will get to your job each and every day. You may own a car, plan to ride public transportation, walk or make other arrangements. You will want to consider time, distance, and costs. There is a list of numbered decision items for you to consider and when each is completed a date should be entered.

Date Completed		**Decision Item**
____________	1.	What type of transportation will you primarily use to get to work?

( ) Your own car or motorcycle
( ) Public transportation (bus)
( ) Friends/Parents will drive
( ) Bicycle/Walk
( ) Car pool
( ) Work at home
( ) Get job close to home
( ) Find job where transportation is provided
( ) Find job where I can live on-site
( ) Lease a car
( ) Buy a car
( ) Catch a cab or hack
( ) Other _________________________

____________ 2. If you went to work, you would have to use this transportation 3 to 5 days per week, twice per day.

If you plan to use your own car:

a. On a scale of 1-10, with 10 being "very reliable," how reliable is your car? __________

What is the make/year of your car? ___________________

How many miles are on your car? ____________________

b. What repairs would it need to be "very reliable?"

____

____

c. Do you have a current and valid driver's license?

Yes ( ) No ( )

d. Do you have violations or unpaid traffic tickets on your record? Yes ( ) No ( )

How much do you owe? $__________

What type of violations: ____________________________

____

f. Do you have insurance? Yes ( ) No ( )

____________ 3. If you plan to use public transportation:

a. Pick up bus schedules for your transportation needs from home to your child care facility and to the work site. Bring in a schedule.

b. How many transfers would you have to make?

____

Also, how close does the bus go to your intended destination? ______________________________________

c. How much will the bus cost per day? __________

d. How long will the bus ride take? __________

e. Complete this statement: The bus stops __________ block(s) from my child's daycare facility. It will take me __________ minutes to walk from the bus stop to the facility. It will take me __________ minutes to get my child(ren) settled down at child care. It will take me __________ minutes to walk back to the bus stop. I have exactly __________ minutes to accomplish this between buses.

f. Complete this statement: The bus stops __________ block(s) from my job. It will take me __________ minutes to walk from the bus stop to my workplace.

g. Do you regularly ride public transportation?

Yes ( ) No ( )

___________ 4. If you are planning to rely on family or friends:

a. Get a written statement of commitment from the family member or friend. The reason for getting the written statement is so that you can tell whether or not the person is serious about driving you. If s/he won't sign a paper, you may want to rethink relying on this person. <u>You must bring in the written statement.</u>

b. On a scale of 1-10, with 10 being "very reliable," how reliable is the person you will be riding with? __________

c. Using the same scale, how reliable is his/her transportation?

____

What make/year is the car? __________________

How many miles is on the car? _______________

d. What is your relationship with this person? ____________

e. Will this person be making a special trip just to take you?

Yes ( ) No ( )

f. Is this person willing to pick you up as early as 8:00 a.m.?

Yes ( ) No ( )

g. Will you have to pay this person to give you a ride?

Yes ( ) No ( )

_______________ 5. Often, the primary transportation plan does not work out, what would be a good back-up plan for you?

____

____

_______________ 6. Often, jobs are not located near neighborhoods where people live; therefore, you will need to decide how many minutes you are willing to travel to go to work. Which towns/suburbs would you be willing and able to commute to?

____

____

____

_______________ 7. If you have determined that you have transportation problems, what would need to be done to solve these problems?

____

____

____

HOW WILL YOU DO ALL OF THIS IN ONE DAY?
Time Management

TIME MANAGEMENT

Instructions: Working will require many hours of your day. The majority of jobs require you to be at work between 20 and 40 hours per week. Those hours are only the beginning. You will need to get ready for work. You may have to get children ready for their day. And you will need to get yourself to and from work. This worksheet will help you plan your day. There is a list of numbered decision items for you to consider and when each is completed a date should be entered.

Date Completed **Decision Item**

______________ 1. Attached are two schedule sheets. First fill one out so that it shows what your typical day is like now. Fill in when you sleep, clean, eat, watch TV, run errands, get out of bed, go to bed, socialize, prepare meals, etc.

______________ 2. Using the second schedule sheet, fill out a schedule that shows what your life would be like since you have started working. Use the following instructions:

Assume work begins at 8:00 a.m. and ends at 5:00 p.m.

_______ a. Working backwards from 8:00 a.m., log the total time it will take you to drive or take a bus from child care to the your job.

_______ b. Working backwards from item a), log the total time it will take you to drive or transport your children from home to child care. (You should now see what time you need to leave the house each morning. If you do not know, use 1 hour.)

_______ c. Still working backwards fill in the schedule with the time it will take you to get dressed, get your children dressed, pack a lunch, and pack your children's lunch. (Your schedule should now show what time you'll need to wake up.)

_______ d. Assuming you need to sleep between 6.5-8.5 hours each night, use the log to calculate what time you'll need to go to bed.

_______ e. Starting with 5:00 pm, log the amount of time it will take you to get home. If you don't know, use 1 hour. If you have children, include travel time to and from child care.

f. Log the time it will take you to prepare dinner, eat, and clean up.

g. Log any hours you help children with homework and/or studies.

h. Log the average amount of time you'll need to bathe the children, and prepare them for bed.

i. Log the time you need to shop, run errands, clean, do laundry, and other chores.

j. Log time you need for leisure activities such as watching TV, reading, calling friends, exercising, etc.

k. Log any additional responsibilities you have that will require time.

______ l. Other obligations: ______________________________

____________ 3. Compare your current schedule to your “working” schedule. What are some of the trade-offs and sacrifices you'll have to make to do well in the job?

____

____

____________ 4. After reviewing your schedule, do you have any concerns about being able to manage everything that will need to be done?

Yes ( ) No ( )

YOUR CURRENT 24-HOUR DAY SCHEDULE

12 midnight 12:15 a.m.	6:00 a.m. 6:15 a.m.	12 noon 12:15 p.m.	6:00 p.m. 6:15 p.m.
12:30 a.m. 12:45 a.m.	6:30 a.m. 6:45 a.m.	12:30 p.m. 12:45 p.m.	6:30 p.m. 6:45 p.m.
1:00 a.m. 1:15 a.m.	7:00 a.m. 7:15 a.m.	1:00 p.m. 1:15 p.m.	7:00 p.m. 7:15 p.m.
1:30 a.m. 1:45 a.m.	7:30 a.m. 7:45 a.m.	1:30 p.m. 1:45 p.m.	7:30 p.m. 7:45 p.m.
2:00 a.m. 2:15 a.m.	8:00 a.m. 8:15 a.m.	2:00 p.m. 2:15 p.m.	8:00 p.m. 8:15 p.m.
2:30 a.m. 2:45 a.m.	8:30 a.m. 8:45 a.m.	2:30 p.m. 2:45 p.m.	8:30 p.m. 8:45 p.m.
3:00 a.m. 3:15 a.m.	9:00 a.m. 9:15 a.m.	3:00 p.m. 3:15 p.m.	9:00 p.m. 9:15 p.m.
3:30 a.m. 3:45 a.m.	9:30 a.m. 9:45 a.m.	3:30 p.m. 3:45 p.m.	9:30 p.m. 9:45 p.m.
4:00 a.m. 4:15 a.m.	10:00 a.m. 10:15 a.m.	4:00 p.m. 4:15 p.m.	10:00 p.m. 10:15 p.m.
4:30 a.m. 4:45 a.m.	10:30 a.m. 10:45 a.m.	4:30 p.m. 4:45 p.m.	10:30 p.m. 10:45 p.m.
5:00 a.m. 5:15 a.m.	11:00 a.m. 11:15 a.m.	5:00 p.m. 5:15 p.m.	11:00 p.m. 11:15 p.m.
5:30 a.m. 5:45 a.m.	11:30 a.m. 11:45 a.m.	5:30 p.m. 5:45 p.m.	11:30 p.m. 11:45 p.m.

24-HOUR DAY JOB SCHEDULE

JOB SCHEDULE	5:30 a.m. 5:45 a.m.	11:30 a.m. 11:45 a.m.	6:00 p.m. 6:15 p.m.
12 midnight 12:15 a.m.	6:00 a.m. 6:15 a.m.	12 noon 12:15 p.m. **JOB**	6:30 p.m. 6:45 p.m.
12:30 a.m. 12:45 a.m.	6:30 a.m. 6:45 a.m.	12:30 p.m. 12:45 p.m. **JOB**	7:00 p.m. 7:15 p.m.
1:00 a.m. 1:15 a.m.	7:00 a.m. 7:15 a.m.	1:00 p.m. 1:15 p.m. **JOB**	7:30 p.m. 7:45 p.m.
1:30 a.m. 1:45 a.m.	7:30 a.m. 7:45 a.m.	1:30 p.m. 1:45 p.m. **JOB**	8:00 p.m. 8:15 p.m.
2:00 a.m. 2:15 a.m.	8:00 a.m. 8:15 a.m. **JOB**	2:00 p.m. 2:15 p.m. **JOB**	8:30 p.m. 8:45 p.m.
2:30 a.m. 2:45 a.m.	8:30 a.m. 8:45 a.m. **JOB**	3:00 p.m. 3:15 p.m. **JOB**	9:00 p.m. 9:15 p.m.
3:00 a.m. 3:15 a.m.	9:00 a.m. 9:15 a.m. **JOB**	3:30 p.m. 3:45 p.m. **JOB**	9:30 p.m. 9:45 p.m.
3:30 a.m. 3:45 a.m.	9:30 a.m. 9:45 a.m. **JOB**	4:00 p.m. 4:15 p.m.	10:00 p.m. 10:15 p.m.
4:00 a.m. 4:15 a.m.	10:00 a.m. 10:15 a.m. **JOB**	4:30 p.m. 4:45 p.m.	10:30 p.m. 10:45 p.m.
4:30 a.m. 4:45 a.m.	10:30 a.m. 10:45 a.m. **JOB**	5:00 p.m. 5:15 p.m.	11:00 p.m. 11:15 p.m.
5:00 a.m. 5:15 a.m.	11:00 a.m. 11:15 a.m. **JOB**	5:30 p.m. 5:45 p.m.	11:30 p.m. 11:45 p.m.

Chapter 4: Case Notes

Client case notes are not only documents of record but also can be used to coach the client as s/he pursues his/her goals. Shifting the purpose of case notes to serve as an objective story describing a client's experiences in a program rather than a disjointed list of client conversations that might include staff opinions about the client is new for many ERA programs. Chapter 4 includes two tools that will help staff make this transition to using case notes as a tool to organize and analyze client information.

Tools the staff can use:

- 4a. Case Notes Checklist
- 4b. Case Notes Sample

Manager's Checklist:

- Are case managers writing detailed case notes after each meeting with a client? Do the notes reflect a plan with next steps that will be taken? Does the plan clearly identify who is responsible for following through on those steps? Does the plan include a timeline?
- Are case managers reviewing the next steps outlined from the previous session in order to reinforce their importance, help clients see progress, and keep clients motivated?
- Are goals articulated in the case notes? Are the goals broken down into step-by-step actions that clients can manage?
- Are new short-term goals set at each session that move clients closer to the larger longer-term goal?
- Is progress assessed against each goal so clients see progress?
- Are staff writing objective descriptions of activities rather than offering personal opinions? Do case notes include information that could be openly shared with clients?
- Are case notes behaviorally specific enough that if an alternate case manager had to work with a client s/he would know what specific actions and activities the client is working on?
- Do you review case manager's case notes and income improvement plans on at least a quarterly basis?

Tool 4a. Case Notes Checklist

Instructions: The case notes and plans are not only documents of record but can be used to coach clients as they pursue their goals. In order to coach and motivate clients, case notes should be constantly updated. Below are guidelines for writing case entries after each client interaction. Please use this checklist to be sure that staff are completing these activities with clients and that they are reflected in the case notes.

- Review goals.
- Review work issues, positive and negative.
- Review progress made from past plans/meetings.
- Provide recognition or any incentives, if appropriate.
- Assign and plan activities/tasks to take place before the next meeting.
- Make at least one assignment that relates to advancement.
- Review client contact information.
- Schedule time for the next meeting.
- Give your client a copy of the plan.

Tool 4b. Case Notes Sample
How to Include Retention and Advancement

Instructions: Case notes can be more than just a paper trail but a tool to help you organize and analyze client information. Case notes combined with a regularly updated Income Improvement Plan can provide a good foundation for how you deliver services to the client.

Below are two examples of case notes. The first example is the weaker example because although the case manager has documented the problems, there is no outlined plan for overcoming the problems. There is also no plan for including retention and advancement activities for the client.

Even for clients who have just been placed on the job, it is never too soon to begin discussing advancement. At least 30 percent of a staff member's work with a client in week one should be geared towards advancement activities. Over time this percentage should increase. Refer to Tool 2c for a list of advancement activities and behaviors that the client can begin practicing as soon as the first week. Of course, the other 70% of a staff member's work with a client will focus on job retention and ensuring that the client remains employed.

The second example is much stronger because it is clear the case manager has developed a specific plan with the client to overcome his/her problems. Each contact also assigns an activity for each to complete with a deadline. This example does not include any subjective opinions but only objective descriptions of the client's behavior and progress. This example could also be handed over to another case manager (CM) and be understood without further explanation.

WEAK CASE NOTES EXAMPLE

Anita's Goal: Nurses Aide
Reading Level: 6.2
Math Level: 5.0

8/10/2003
Anita got a job today. She's making $6.50 an hour 30 hours a week at the ABC Daycare Center as a child care worker.

9/10/2003
Anita is still working and says she likes the job. She missed one day because her daughter (10) was sick and had to stay home from school. Two days she says she was late. She's still at $6.50 an hour and is working 30 hours/week.

10/10/2003
Anita is upset because she says her paycheck was wrong. We talked about what to do. She says she will ask her supervisor about it.

11/10/2003
When I called Anita, I learned she quit on 10/25/2003. She said she'll look for a job elsewhere.

STRONG CASE NOTES EXAMPLE

Anita's Goal: Nurses Aide
Reading Level: 6.2
Math Level: 5.0

8/10/2003
Anita got a job today. 💻 She is making $6.50 an hour, 30 hours/week at ABC Daycare Center as a childcare worker. Her supervisor is Carla Anderson.

Plan:

1) Anita will ask for a job description by 8/17/2003. She will also ask about raise points and will try to obtain an employee handbook.

2) CM will get a catalogue from local schools on nursing programs by 8/15/2003.

3) CM will send congratulations letter to Anita and give her incentive by 8/15/2003.

4) Anita will call GED center to get information on hours.

5) Anita and CM will meet 8/15/2003 to review job description.

8/15/2003
Anita and CM met as planned. She had a job description and raise points but the employer had no personnel handbooks. She said he was getting them updated and will have one in a month.

Anita had received her certificate and incentive. CM gave her the catalogue on nursing.

Anita reports that she missed one day last week because she was tired. She is still getting 30 hours/week and earning $6.50 an hour.

Plan:

1) Anita qualifies for a raise after 90 days on the job. That is November 10, 2003 so on November 1, 2003, CM and Anita will discuss how to ask for a raise.

2) Anita agreed to go to bed this week by 10:30 p.m. to see if that helps her be less tired. She agreed to unplug the phone. We will review the plan and her attendance 9/1/2003 to see if it worked.

3) CM and Anita agreed to work on the "Punctuality/Attendance" unit of the passport.

4) Anita agreed to stop by the nighttime GED program to meet the instructor.

5) CM reviewed all of Anita's contact information and updated it in her file.

6) Anita agreed to let the job developer talk to her employer about Anita's potential. CM will request the job developer does a visit. CM will make a request by close of business today.

8) CM and Anita reviewed the job description. Anita had some questions about it and agreed to ask the supervisor for a short meeting so they could discuss it.

9) Next meeting is scheduled for 9/1/2003 by phone.

Chapter 5: Outreach and Recruitment

Locating clients and engaging their interest are the first steps to helping them improve their lives. For many ERA programs this is particularly challenging because the clients are busy with work and family and no longer required to participate. Instead program staff must sell the client on the services. Chapter 5 includes six tools that incorporate basic marketing rules and serve as examples that are key to successful outreach and recruitment campaigns.

Tools and samples the staff can use:

- 5a. Tips for Creating Successful Direct Mail
- 5b. Sample ClipArt for Outreach and Recruitment
- 5c. Sample Fliers
- 5d. Sample Recruitment Letters
- 5e. Telephone Script
- 5f. Income Improvement Orientation Binder (To view, see Chapter 2)

Other resources to add to your toolkit:

- A protocol that outlines the referral process of clients from other agencies (TANF, WIA, etc.) A protocol cannot include how often, when, and the method of expected contact to recruit the clients.
- Program Newsletter

Manager's Checklist

- Are staff following the contact protocol? For example, send a letter, follow-up with a phone call within one week, send a second letter to those who do not respond, follow-up with another phone call, send a third letter and follow-up, etc.
- Do staff use a direct mail package to invite clients into the office for the first time? Does it include fliers, testimonials and a "lift letter," which could be a half page letter sealed with a sticker that requires the reader to physically lift up a flap to open and read and either restates the benefits or includes testimonials?
- Are marketing messages consistent in all materials? Is the message repeated multiple times to clients to make sure the message is heard and understood?
- Are marketing materials written from the client's point of view (e.g., not enough money, bad work hours, not enough hours, no opportunities to move up) rather than from the program's point of view (retention services, supportive services, counseling and support)?
- Are marketing materials written in words that the client would use and at their reading level?

- Are the messages concise and easy to understand? Are sentences shorter than ten words? Are action words used? (e.g., instead of "for more information call…" do materials say "Call today")
- Do all materials include illustrations of the benefits the program and materials are promoting?
- Are the headlines the benefits of the program rather than the name of the program?
- Are staff using at least one marketing piece that shares client success stories?
- Do staff have materials and a sales script to overcome basic repeated objections that clients might raise?
- Do staff have a suggested telephone sales script to use when contacting clients by phone to invite them into the office?
- When letters are sent, are they personalized with the client's name?
- Are letters hand-signed?
- Are materials set in a typeface that is legible and easy to read such as Times-Roman?
- Is "Address Correction Requested" printed under the return address on the envelope so staff can get an updated address if the client has moved?
- Does the program offer any type of incentive for coming to the initial appointment?
- Is there a way for staff to monitor or test which materials result in high response rates and which do not?

Tool 5a. Tips for Creating Successful Direct Mail

A direct mail package should include:

1. Introductory letter;
2. Flier;
3. Lift letter (a smaller envelope or letter that requires the reader to physically lift up a flap to open and read, which is a tactic to get the reader more involved in the message);
4. Some sort of surprise, such as an appointment card, testimonial or incentive.

Direct mail materials should:

1. Be benefit-oriented – demonstrate the program's outcome and not the process;
2. Be personalized;
3. Be hand-signed;
4. Include a P.S.;
5. Be jargon free;
6. Use simple language;
7. Use short sentences;
8. Include testimonials or success stories;
9. Urge immediate action.

The outside envelope should:

1. Always use a stamp or meter for postage, never a printed bulk-mail or first-class permit that looks to much like junk mail;
2. Have a return address that does not sound like a government or social services organization. Consider printing new envelopes that are more neutral. Example: "Business Services Division" or just use a piece of art where the return address would go;
3. Be hand-addressed, which provides a warm, personal touch. If this is impractical, type the address. Labels should only be used as a last resort.

The letter inside should:

1. Use a stationery or letterhead that is not considered threatening;
2. Always have a date;
3. Personalize the greeting whenever possible;
4. Indent each paragraph and double-space between paragraphs;
5. Contain sentences that are 15 or fewer words (10 or fewer words if the letter is to potential clients);
6. Contain words that are one and two syllables;
7. Eliminate all job training jargon. Give your letter the "next-door neighbor" test. If your neighbor doesn't understand a word or phrase, change it;

8. Contain sentences written in the active voice: Subject – Verb – Object. This has more impact than passive voice: Object – Verb – Subject;
9. Not be more than to one or two pages;
10. Be hand-signed in blue ink to contrast clearly with black type;
11. Include a benefits oriented flier and testimonials;
12. Include a P. S., whenever space allows, below the signature line that either re-states the program benefit or solution for emphasis, such as more money.

Introduction to Tools 5b, 5c, 5d and 5e

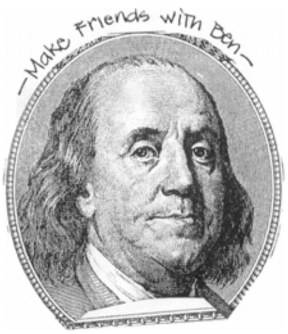
Instructions: The first rule of thumb from marketing 101 is that all sales are based on solutions to problems. The trick is to figure out the problem from the client's point of view. Often the extent to which a client participates in a program is related to the extent to which they feel as if it solves a problem. All marketing and recruitment materials should demonstrate to the client how the services will help solve their problems and much, much more. All marketing materials such as recruitment letters, fliers, brochures, and every conversation with the clients should sell the **solution** or the **benefit** of the program services, and not the services themselves. The goal of a good marketing campaign is to translate program services or features into benefits to clients. Staff should always sell the outcome and not the process. For example, the table below illustrates how program features can be translated into benefits to the clients and solutions to client problems.

Problems	Benefits
Not enough money	More money
Bad work hours	Flexible work hours
No benefits	Benefits package
Hate their job	Jobs they love
Not enough hours	More hours
No room for advancement	Promotion or better job in another company
Hate their boss	A boss you like

Tools 5b, 5c, 5d and 5e provide examples that use this outcome-based sales technique.

As a manager you might want to learn which message or marketing materials are the most successful. Measure client responses. An easy way to do this is to use different staff names or extensions on the various marketing pieces. For example on one brochure you might say, "Call Ms. Kelly at 555-123-4567 for your appointment today!" and on another you might list a different staff person. That way it is easier to understand to which marketing piece people are most often responding.

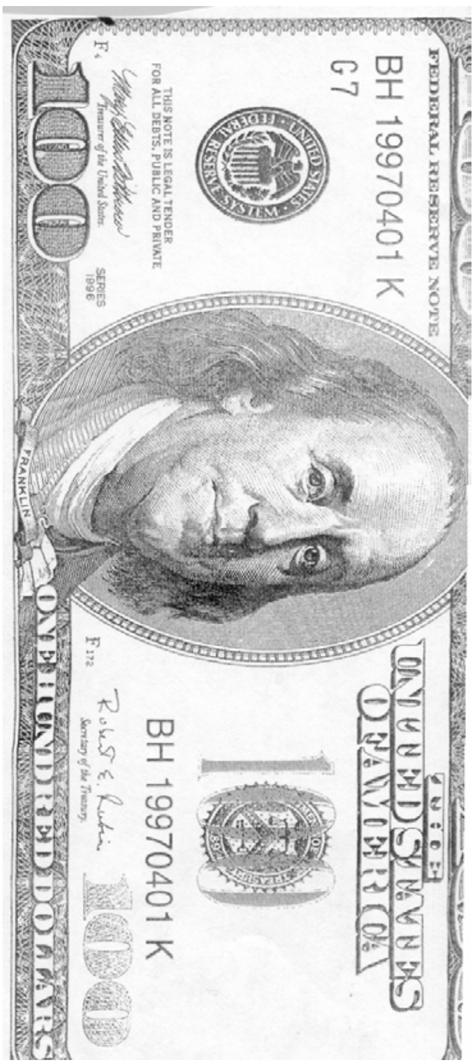
Tool 5b. Sample ClipArt for Outreach and Recruitment



Tool 5c. Sample Fliers

EARN MORE!

HAVE MORE LEFT OVER AT THE END OF THE MONTH!



Bills Bills Bills Bills Bills
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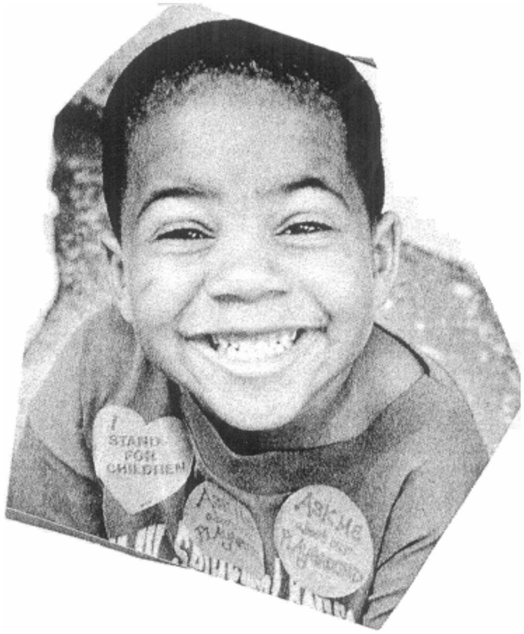
PAID IN FULL

CAN YOU AFFORD NOT TO CALL US TODAY?

CALL 212-555-CASH



CLOSE….. so close to a bigger paycheck. Have money left over for things you and your family need.

You are just
a simple phone call away.

<u>DON'T DELAY!!</u>

CALL ME TODAY!!

Jodie @ 212-555-CASH.

Tool 5d. Sample Recruitment Letters

$$ **WE MISS YOU!** $$

Dear Melissa:

You are just about there! You are close to earning the money you need to pay all your bills with cash left over. All it takes is just **ONE** phone call.

Remember when you told us that you never had enough money to make ends meet? We were ready to help you bring home more than you need. Then you stopped coming. If you still want more money then pick up the phone and call me **NOW**!!!

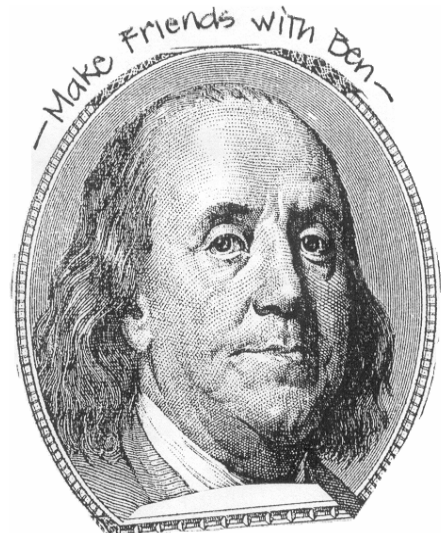
We have jobs that will allow you to earn:

GOOD WAGES
GOOD BENEFITS
CASH REWARDS
AND START YOU ON A GREAT CAREER

We want to help you leave welfare behind, have cash in your pocket and be able to buy things for your kids.

Sincerely,

Your Case Manager



Dear Pamela,

Not ENUF money? Can't
pay your bills? Children
need new shoes?

We can help you get:

MORE MONEY!
BENEFITS ON THE JOB!
AND A JOB YOU LOVE!

You can bank on it!

Join today and we can begin to make it happen. Train for the job you really want or move up and make more in the job you already have. Space is limited. Come see if you us to join.

Attend: September 22, 2002
Time: 9:00 a.m. Place:
Your program site

Your friend,
Ben Franklin

Ben Franklin

P. S. DON'T WAIT FOR SUCCESS TO COME TO YOU. GRAB IT NOW!

Tool 5e. Telephone Script

The first rule of thumb from Marketing 101 is that all sales are based on solutions to problems. All marketing and recruitment materials should reflect that by demonstrating to the client how the services will help solve their problems and much more. In a phone conversation where the worker is trying to get the client to come in for an appointment, the following steps should be taken:

1. Begin phone conversations with a **General Benefit Statement** (bold sentences below).

   - This statement describes the problem you believe the client is experiencing.
   - This statement cannot last more than 45 seconds.

2. Describe a problem or need from the client's perspective.
3. Offer a solution.

Example #1:

I know that many people I work with struggle month to month to just get by. Sometimes it seems like getting a job will just set them back that much further. We took a look at that and saw that in some ways that was true. Agencies often help people get jobs and then let the workers fend for themselves. That is why I am so excited that we are different. We have focused all of our services to help people not just get a job but to really look at how to increase their income once they get the job. You know--help you to make more money.

Example #2:

We recognize that many people who go to work in entry-level jobs just can't survive on their paycheck. It just isn't enough. I work with a new program called ERA and we help entry-level workers such as yourself earn more money.

Example #3:

I know that often times people get jobs in the community but find themselves struggling to make ends meet. It seems that once the bills are paid, there isn't anything left. I am working with an organization and we offer help to people who can't live on what they earn. We work with people who want to make more money so they can live a better life. We help people get more hours, get raises or train for a better job.

Chapter 6: Participation and Motivation

After initial contact is made with clients, program staff must work to sustain participation and keep clients focused on their retention and advancement goals. The program's value must be sold repeatedly to the clients and to those in their lives. Chapter 6 includes five tools to help staff keep clients motivated.

Tools the staff can use:

- 6a. Minimum Motivational Tools
- 6b. Contact Strategy Checklist
- 6c. Recognition Checklist
- 6d. Passport to the Future (To view, see Chapter 3)
- 6e. Income Improvement Orientation Binder (To view, see Chapter 2)

Other resources to add to your toolkit:

- A case management protocol or outlined process that assists staff to prioritize clients. This is particularly useful as caseloads grow in size.
- An incentive structure that offers in-kind or cash incentives when clients participate. See the ERA intranet site for samples of incentive structures developed by ERA sites.

Manager's Checklist:

- Do staff create binders or folders of printed marketing materials to use to sell clients on the concept of ERA during their first face-to-face meeting? If a binder exists, is it used on an ongoing basis to sustain client participation?
- Is the focus of the initial sales presentation on making more money or making a better life for oneself (advancement) as opposed to getting and retaining a job?
- Are clients leaving the initial face-to-face meeting with sales materials so they can sell their family and friends on the concept and get their support?
- Do staff have a strategy for contacting clients once they are working?
- Do staff follow a protocol or process that outlines the level of effort expected per client?
- Are staff double-checking contact information each time contact is made so the program can locate them?
- Do staff identify a life goal for each client at the initial meeting (e.g., move into my own apartment, buy a house, get the kids school clothes)?
- Do staff talk about life goals with clients each time they meet as a way of reminding clients of their goal and motivating them to continue?
- Do staff map out concrete, small steps with clients that pave the way to achieving his/her employment goals?

- Has the "employment plan" been renamed the "Income Improvement Plan" to keep the focus of the program on making more money rather than merely employment?
- Is there a recognition or incentive system in place to recognize achievements made by clients?
- Are staff following the guidelines on the recognition checklist to assure the recognition system is effective at shaping new behaviors?
- Do staff set career goals with clients and then work with clients at each meeting to move them closer to their goals?
- Do staff demonstrate a willingness to work flexible hours?
- Do staff show a willingness to meet with clients away from the office?

Tool 6a. Minimum Motivational Tools

Instructions: Just like a carpenter would never show up to work without his hammer, ERA staff cannot be expected to recruit clients and engage them in program services without a set of tools. The following matrix allows program staff to assess which motivational tools they currently have available to them. In the first column is a list of possible tools that a program could develop as part of their marketing materials. The tools can be used to introduce the program to the client (Motivational Invitation Letters) or to sustain client participation months into the program (Achievement/Recognition Devices). In the second column, staff can indicate whether or not they have the tool listed in column one. Finally, in the third column, staff can indicate what they will use in the absence of a formal tool.

Tool/Strategy	Currently Have/Use	Replacement Idea
CONTACT STRATEGY CHECKLIST		
MOTIVATIONAL INVITATION LETTERS		
MOTIVATIONAL ORIENTATION		
INCOME IMPROVEMENT ORIENTATION BINDER		
ASSESSMENT OF MOTIVATION		
SECOND ROUND OF INVITATION LETTERS		

TELEPHONE SCRIPTS		
ACHIEVEMENT / RECOGNITION DEVICES		
INCENTIVES		
INCOME IMPROVEMENT PLAN		
APPOINTMENT REMINDER CARDS		
OTHER		

Tool 6b. Contact Strategy Checklist

- Ask the client for at least five people who will always know where they are.
- Review or add all phone numbers, pager numbers, E-mail addresses and work phone numbers at every post-placement point of contact.
- Get the client to give you a list of other agencies that they receive services from. Get a release of information signed for every agency.
- Get information about the employer - e.g., supervisor's name, name of business, address and phone number.
- Tell the client s/he can use you as a reference for future jobs, schools, etc. This could help you find the client if they look for a new job or apply to school.
- Ask the client for nicknames. Use a nickname if it is one the family uses when contacting a client.
- Mail a congratulations card to test the client's address. Write "Address Correction Requested" under the return address.
- Give the client a "change of address" package from the post office. Address one post-card to yourself and put a stamp on it.
- Get a list of co-workers with whom the client has become friends. Get contact information.
- Look them up on www.switchboard.com if you can't find them. If they have a home phone number in their name, they will appear.

Tool 6c. Recognition Checklist

Recognition can be used to "shape" new behaviors and therefore can be a valuable strategy to use with clients. Managers should consider designing a recognition or incentive system to be used to initially grab a client's attention as well as a way to reward sustained participation. However, recognition shapes behavior only if the recognition system adheres to the following rules:

1) **The behaviors that will be rewarded and the reward itself are known to the client.** If the client understands what is required and desires the reward then behaviors will be modified to obtain the prize.

2) **The behaviors need to be measurable.** Examples include showing up on time, attending class five days in a row, calling in advance of being late or absent, going on three job interviews. Behaviors that aren't measurable include: showing a good attitude, being motivated and being enthusiastic.

3) **The reward or prize must be desirable.** You can use cash, certificates, gift coupons, a congratulatory letter, name on bulletin board, and a reserved parking spot among others. But the extent to which the client will demonstrate the new behaviors will be influenced by the desirability of the prize.

4) **Recognition must be consistent.** Two aspects of consistency apply. First, if rules are set for what behaviors must be exhibited to earn the reward, then no rewards should be given to clients who do not meet that standard. Second, the recognition system can not fade in and fade out of existence.

5) **Recognition needs to be frequent as a new behavior is being shaped.** In a program, clients should have an opportunity to earn recognition at minimum once every two weeks.

Ideally, programs will identify the behaviors that need to be shaped and then match those behaviors with a reward. Having a recognition plan is valuable and should include a wide range of rewards. To illustrate, certificates can be valued rewards. However, issuing certificates for every behavior will quickly lessen the effectiveness of a certificate.

Chapter 7: Building Employer Support

Many ERA programs are only as successful as the strength of their employer networks. Strong employer relationships are key to ensuring that pre-placement programs lead to unsubsidized jobs and that clients can access the support they need to keep the job and advance. Chapter 7 includes just one tool that serves as a comprehensive manual to approaching employers and demonstrating to them how your program can meet their needs and those of your clients.

Tools the staff can use:

- 7a. Building Employer Support Manual

Other resources to add to your toolkit:

- Access to an online or hardcopy database of job openings (nationwide, statewide, or local), such as America's Job Bank at www.ajb.org or a statewide database like Wisconsin's at www.wisconsinjobcenter.org.

Manager's Checklist:

- Are staff contacting employers to sell the program, help clients get placed, follow-up on working clients and to talk about career ladders?
- Are staff providing post-placement services to employers to build client's occupational skills, basic skills and work habits and attitudes?
- Is the program being sold to employers as a program that can help reduce employee turnover as it's primary benefit as opposed to simply helping the employer find a worker?
- Do staff have letters that are needed to prospect for new employers?
- Do staff have telemarketing scripts that are needed to prospect for new employers?
- Are staff offering a full range of services to employers to gain their support?
- Do staff who job develop have the basic marketing materials needed to sell the program?
- Do staff read and use the techniques outlined in "Breakthrough in Job Development?"

Tool 7a. Building Employer Support Manual

TABLE OF CONTENTS

Introduction

One of the most challenging tasks of your employment and training program is placing clients in jobs. Funders almost always ask, "What's the placement rate?" and program effectiveness is often judged by how many people got jobs.

Yet interesting employers in your clients is a time-consuming task that requires more than social service skills.

As more and more clients near program completion, pressure will grow on the job development staff. The purpose of this tool is to strengthen job development in employment and training programs. To accomplish this, it draws on experience from employment and training programs as well as private sector marketing. Obviously, your employment and training program must do the hard work of getting clients ready for jobs, but this tool will help you effectively develop jobs for your clients once they are ready to leave the program.

Tool 7a presents practical tools and strategies that you can adapt to your own situation. It will help you understand how to build relationships with prospective employers, how to involve clients in a successful job search and what type of system you need in place to support placement and encourage job retention.

Tool 7a is designed to be used by the staff who are responsible for job development. However, the first two sections -- positioning and retention services -- will also be helpful to directors and other staff.

Tool 7a is organized into two sections:

1. **Selling Your Program**

   The first section will give you a chance to improve your sales presentations. Since effective salesmanship requires practice, this section is full of exercises.

2. **Effectively Managing Time**

   The second section provides strategies and tools for effectively managing your time and record keeping demands.

PRETEST - BEFORE YOU GET STARTED

Just for fun, take this pretest before you study Tool 7a. Then work your way through and see how much you've learned!

1. Your program is in a competitive market. To develop a position or market niche, your program must be well-positioned in the mind of the employer relative to its competition. What is the competition?

   ____

   ____

2. Name at least four reasons an employer may have for hiring from your program.

   a)____

   b)____

   c)____

   d)____

3. The definition of a program feature is:

   ____

   ____

   The definition of a program benefit is:

   ____

   ____

4. An employer has revealed the following to you:

   "Finding someone who will work evening hours and weekends for just over minimum wage has been difficult. Employees seem to come and go."

   What should you say next?

a) "What are the hours and starting wage?"

b) "Have you considered rotating the hours so that someone wouldn't have to work every weekend?"

c) "We have a pool of people who would be willing to work the hours and for the wages you suggest."

d) "It can be a time-consuming search to find the right person for the job."

5. If an employer objects to using your service, name two steps you should use to overcome the objection:

   a) ____

   b) ____

6. To begin a job development call, the job developer should:

   a) Give the employer background/historical information about the agency.

   b) Ask the employer about his or her hiring process.

   c) Describe a general need the job developer thinks the employer might have.

   d) Give the employer literature about the agency.

7. When referring a client to an employer, at what point should you mention that the client is economically disadvantaged?

   a) Within the first two minutes of the sales call.

   b) At the end of the call.

   c) Never.

   d) Only if the employer asks.

   e) Sandwich it in during the middle of the call.

8. True or false: Promotional materials should be given to the employer at the end of the job development call to be reviewed after you leave.

   True ( ) False ( )

9. True or false: Professional business letters do not contain postscripts. Therefore, when writing a sales letter to an employer, it is best not to include a P.S.

   True ( ) False ( )

WHAT YOUR PROGRAM OFFERS EMPLOYERS

Before you can market your program to employers, you must have a very clear idea of what you will be selling and how you want employers to think of your program. While successful with some employers, the altruistic approach, "Hire these people because they need a chance," will not be successful with the majority. About 20 percent of employers hire from social service programs for altruistic reasons. But that leaves 80 percent of your market!

As you contact employers, you may find that job developers from other agencies have been there before you. You may also discover that employers already have a primary source of new workers. And, while their methods may not be perfect, employers will be generally happy with them.

As a result, you must have a very clear idea of what you are selling. There is strong competition for the jobs your clients could fill. You need to know the competitors in your community and how they operate. You can then differentiate your services from theirs in meaningful ways.

Failure to identify and establish a unique position in the market usually has at least one of the following consequences:

1. You will be pushed into competing head-on with larger, more established organizations.

2. Your market position will be so unclear that employers will be confused about what you can offer.

3. You will be pushed into a market position nobody else wants.

To differentiate yourself from the competition, answer these fundamental questions:

1. What do employers expect from a placement service?

   ____

   ____

2. What problems do employers have when hiring entry-level employees?

   ____

   ____

3. What are the advantages and disadvantages of the approaches employers use to find new employees?

______________________________ __________________________ ________

____

4. Why should the employer use you?

____

____

Only you can make a compelling case why the employer should hire from your program. The employer will not make it for you.

To define a competitive position, job developers need a sense of what employers value, what level of quality and performance they want, and whether there are significant differences between the services they offer and those available from the competition.

As a first step, you may want to conduct a competitive analysis. List all the specific competitors you face. Next, make a list of their strengths and weaknesses. Comparing this list to your own services should indicate strengths you can emphasize during conversation.

In many cases, as we will see in another chapter, you may have to develop new services or sophistication to beat the competition.

The following chart presents the pros and cons of the most serious competition you'll likely face. Make sure you know these well before approaching employers. Before you conduct job development calls, fill in the last column: Why are you better?

THE COMPETITION

COMPETITION	PROS	CONS	WHY ARE WE BETTER?
Newspaper Ads	> Quick to run > Wide coverage > Easily accessible > Economical > Easy to do > High visibility > Immediate results > Self-screening > Many applicants > Can screen before interview > Can advertise anonymously	> Ads run after position is filled > People may not see the ad > Can be expensive (ad cost plus employee screening time) > Misprints > Time-consuming to screen > Many unqualified > Many phone calls > People know you are hiring	
Current Employees	> Easy, efficient > Low cost > Knowledge of minimum qualifications > Increase group cohesiveness > Possibly less training time > Can trust employee > Like attracts like	> Recommend a friend, not necessarily someone who is qualified > Could be difficult to dismiss > Nepotism > Applicant knows too much information coming in--brings in any current worker bias	
Walk-Ins	> Free > No effort on employer's part > Applicant has genuine interest in the company > More assertive applicant group > Shows initiative > Can assess communication skills > No responsibility to retrain	> Can't pre-screen > Interrupts workday (inconvenient) > Applicants aren't always qualified > Might miss better applicant > No background on applicant > Time consuming > Can get "false" first impression > Less control/structure--interrupted so aren't prepared to do an interview	

THE COMPETITION

COMPETITION	PROS	CONS	WHY ARE WE BETTER?
Job Service	> Large applicant pool > Free > Referrals are prescreened and tested > Traditional > Will advertise for you or at least spare you the cost > You can access labor market information	> The matching is often inappropriate > Not good at matching entry-level opening > Does no training > Provides no service after the sale > Some applicants are sent because it's mandatory for unemployment insurance benefits	
Internal Personnel Department	> Established procedure > Knows the company's needs > Provides screening, testing, matching > Has applicant pool > Has a trained personnel director	> Expensive > Narrow focus > Limited access > Applicant pool might not be qualified applicants > Expense increases staff costs	
Temporary	> No wait > No long-term commitment > No paperwork > No payment for fringe benefits > Quick referral of qualified applicants > Pre-tested/pre-screened > No responsibility to retrain	> Temporary worker not committed > No additional training provided > Not always prescreened > Client/employer must pay a fee > May not have the right person	
Colleges and Universities	> Applicants have high level of technical skills > Large volume of applicants > More to select from > No advertising costs > Applicants are motivated	> Only certain jobs require college graduates > College graduates want higher wages/benefits > College graduates aren't readily available in all areas	
Private	> They can send the best applicants > Normally specialized	> A fee involved > Limited applicants > Some people avoid them > Limited screening and testing	

PRODUCT ENHANCEMENTS: PLACEMENT AND RETENTION SERVICES

Your program can beat the competition by offering "product enhancements" and "augmentations" that exceed employers' expectations. Take another look at the list of competitors and notice that nearly all offer job matching services. The employer lists a job with the personnel agency or in the newspaper. Candidates are located and apply. But often the service stops there, with the entire focus left on the pool of applicants.

A better and unique market position for your program is one that emphasizes placement and retention. In other words, provide an expanded line of services. For example, stress that: "We not only find you a good worker, we help you keep the worker on the job." Are employers concerned about retention? If you pick up almost any issue of a personnel journal, you will find at least one or two articles about reducing employee turnover. Hiring and retraining new workers is expensive. Helping employers reduce cost and save money is a valuable service.

Obviously, your program cannot claim job retention as a strength unless it provides services that increase the likelihood of job retention. Claims that are not backed up by performance will work only once. Programs must be concerned with developing long-term relationships with employers.

There is often more than a little of Murphy's Law at work in employment and training programs. The moment you place a client on the claim that hiring from your program will save money, the client will somehow cost the employer money. The moment you guarantee productivity, the employer will catch the client asleep on the job. It is a good policy to sell the services you offer rather than the clients themselves, because you can be more confident in the quality and consistency.

There are at least two advantages to having consistent placement and retention procedures in place. First, it is easier to sell consistent services because potential employers will know exactly what to expect. Second, procedures can be built into placement and end up decreasing turnover.

Are there other competitive positions that your program can take besides better retention? Let's look at a few that it cannot take. Your programs probably cannot act as labor exchanges. The pool of job seekers is too small and the Job Service already has this niche and would be difficult to compete with. Your program would also have a difficult time substantiating claims that clients are better educated, work harder, or are more experienced than other job seekers. Many other agencies help dislocated workers (with proven work histories), recent college graduates, and other such job seekers.

So what's left? Employers are highly concerned with retention--a niche few others have exploited. A strong focus on retention will help clients and employers alike.

Selling Your Program

This section will outline the differences between selling products and services and equip you with the skills and knowledge to become an effective job developer. To be good, you'll have to do three things: practice, practice, practice.

In this section you will learn:

- What to say when you initially meet the employer;
- How to get employers to talk about their needs;
- How to overcome objections, skepticism, and indifference; and
- How to close the sale.

If you are a little skeptical about sales and marketing, you are not alone. Everyone is bombarded with sales pitches. Someone is always trying to sell you something.

Nonprofits are often reluctant to engage in personal selling. First, many staff believe their program is inherently good and just needs to be publicized. Second, sales is seen as a synonym for manipulation and unethical behavior.

However, in marketing there are two very different approaches: one-time sales and customer-oriented sales. The one-time sales approach gives marketing a bad name. It uses hard-sell techniques, such as overstating the product's merits, openly criticizing the competition, using slick canned presentations, and exerting pressure.

The other approach focuses on the customer's needs and wants. It is more like consulting than sales because each presentation is tailored to the specific needs of one customer.

In the hard sell, the salesperson believes that customers buy only under pressure. In the customer-oriented approach, the salesperson focuses on the customer's needs and is concerned about long-term relationships.

Social service staff tend to be more comfortable with the needs-based, customer-oriented sales approach. That is the approach advocated here.

RELATIONSHIP MANAGEMENT

Marketing a service is different than marketing a product. What is a service? Here's a definition written by marketing expert, Phillip Kotler:

> "A service is any activity or benefit that one party can offer to another that is essentially intangible and does not result in the ownership of anything."

Services have distinct characteristics that must be considered when they are being marketed:

1. **Services are intangible.** A service cannot be displayed, demonstrated, or illustrated in the same way as goods. A good can be tasted, touched, or seen before a purchase decision is made. A service cannot. The employer will make a decision based solely on his or her confidence that the service will be worthwhile.

   There are several techniques the job developer can use to build the employer's confidence when selling an intangible service. The look of the materials, the way the job developer dresses, the professionalism of the letters, and the grooming of the clients all take on heightened importance because that is all the employer has to go on. Be very critical of your own appearance and materials, as well as of the clients' preparation.

2. **Services are not standard.** You will not be able to provide consistent quality to all customers. The service will vary, depending on who is providing the service and which clients are referred. Because placement is not an exact science and clients are individuals, employers cannot be certain about performance even if they hire from you regularly.

   Your program can decrease the variability of services to employers by adopting a uniform placement procedure.

3. **Services are created and used simultaneously.** Goods can sit on the shelf and exist regardless of whether anyone purchases them. Services are created at the time of purchase. The employer helps produce the service, thereby affecting its performance and quality. For example, if the employer does not give you enough information on the job order, the likelihood of a high quality job match will drop.

It is important that employers be educated about how to use your program effectively. If the employer refuses to give much information on the job order, will not allow job previewing, or resists client follow-up, retention will suffer. To prevent this, make sure the employer understands the services, how to use them, and their advantages.

When you sell something intangible, customers focus on your failure, not your success. When all goes well, they hardly give you a second thought. When a client messes up, they are upset. This is one of the toughest challenges of selling services -- getting employers to remember you when all is going well and minimizing the occasional gaffe.

The tool to accomplish those dual goals is "relationship management." Relationship management involves reminding people constantly of your successes and your services. You want customers to feel so good about your services that one negative experience seems less important.

The following is a laundry list of ideas on how to manage relationships:

- **Get testimonials from satisfied employers.** Use the testimonials during job development. Mail them in letters. Send them to employers periodically.

- **Speak at service clubs.** The more chances you have to interact with employers on a social level, the more likely they are to trust you as a peer, not as a sales person.

- **Join community organizations to which influential employers belong.**

- **Write news articles spotlighting local employers who have hired from you.** When the article appears, cut it out and send it to the employer with a handwritten note.

- **Hold an annual recognition banquet.** Invite any employers who have hired clients the past year and employers you wish would hire from you. Make sure the ceremony includes a few testimonials from satisfied employers. Invite local politicians and other influential people.

- **Distribute recognition certificates.** Send employers certificates of appreciation. Ideally, include a frame. This isn't necessary, but the employer will be more likely to hang a framed certificate and it will serve as a constant reminder of your appreciation.

- **Begin an "Employer Advisory Council."** Ask employers to meet periodically to give you advice and consultation. Tip O'Neill once said, "If you want someone's support, ask them to do something for you. That is better than doing something for them." When an employer puts in time as an advisory council member, he or she will be committed to your program.

- **Set up a "business partner of the month" and "business partner of the year" program.** Employers could get a certificate, newsletter recognition, and a special award at the annual banquet.

- **Give novelty gifts to repeat customers.** For example, if you have logo coffee mugs, give them to employers as a way of saying "thank you." They'll use the mug and remember you.

- **Distribute a program newsletter.** Give it intrinsic value by including articles that would appeal to employers--for example, "How to Detect Resume Fraud" or "Increasing Employee Productivity." Newsletters that only report on program staff and clients have less utility for employer marketing.

- **Hold quarterly (breakfast) meetings to encourage business people to discuss their expectations and experiences with your participants.**

- **Attend community ceremonial events -- dinners, open houses, etc.** It is important to be seen as a player in the community.

- **Purchase supplies from businesses that support your program.**

- **Ask employers to review your pre-employment or classroom curriculum.** Employers are in an ideal position to tell you what should be emphasized. It is also a subtle way of showing employers which topics get covered with clients.

- **Run free workshops for employers.** A job training agency in rural Virginia held quarterly workshops on a wide variety of topics, including supervision, time management, how to hire, legal issues in hiring, and the Americans with Disabilities Act.

- **Survey business people to learn more about their personnel needs.** This shows employers that you are trying to be responsive and improve your service.

- **Write articles for the Chamber of Commerce newsletter.**

- **Send thank you letters to businesses that have interviewed or hired a trainee.**

- **Set up an interviewing workshop or competition for clients.** Ask local employers to speak or serve as judges.

You can probably think of other activities. The important thing is to plan and budget for relationship management. It is an integral part of building employer support and reduces the amount of time staff spend making job development sales calls.

CUSTOMER-ORIENTED SALES: THE BASICS

How your organization is funded, how it came into being, and how it is staffed are inconsequential to most customers. Ford, GM, and Chrysler do not make you memorize the history of their companies before you buy a car.

All sales are based on *solutions to problems*. Customer needs and desires should therefore be the focus of the sales call. As a job developer, your goal will be to uncover customer needs and to satisfy them with the benefits of your employment and training service. You will convince employers to hire your clients only if you show that you can solve their need with a benefit derived from your product or service.

The benefit is what links the employer need to the program feature. As a salesperson, it is your job to translate program *features* into *benefits*.

A *feature* is a characteristic of a product or service. For example, pre-employment training, post placement follow-up services, assessment, and job matching are all program features.

What is a benefit? A *benefit* is a solution to a customer's problem or need (from the customer's point of view) and answers the question, "What is in it for me?" If a customer does not need one of your features, then it will not be of benefit. Customers buy benefits, not features.

Feature statements are generally written in the first person -- they are egocentric. "We do this. . .We provide. . . Our office. . ." On the other hand, benefits are written from the employers' perspective so are generally in the second person; in other words as "you" statements. "You save time and hassles. . .You'll get. . .Call today (implied you). . . " This is a rule with few exceptions.

Examine the following statements. Which are features and which are benefits?

_____ 1. All clients attend pre-employment training classes where work habits and attitudes are taught.

_____2. We offer follow-up services at regular intervals.

_____ 3. Prescreening saves you time. You only interview those people who are qualified for the position.

_____4. You'll have access to workers with a wide range of skills and experience.

_____ 5. Programs are set up to help the economically disadvantaged join the ranks of the employed.

_____6. You get a worker who has proven that he can get to the job on time every day.

_____ 7. Clients attend education classes five days a week.

Benefit statements are numbers 3, 4 and 6. Compare statements 1 and 6. Number 1 is a feature. It merely states a fact and does not strive to show the employer what he gets. On the other hand, Number 6 translates a feature (strict attendance policy) into a benefit. Number 7 is similar to Number 1. Number 2 fails the so-what-does-this-mean-to-me test. An improved version would be, "You get follow-up services to ensure that the worker makes a smooth transition from working with us to working for you." Number 5 is simply a part of the agency mission statement.

The following page lists some benefits employers might reap from your services.

FEATURE	BENEFIT	ULTIMATE BENEFIT
Assessment	You get a measure of each applicant's skills plus you get proof they have the skill.	(Sense of security Less training time)
Job matching	You only interview the qualified people.	(Save time and money Less turnover)
Work Experience	You get a worker who has demonstrated good work habits and attitudes.	(Sense of security)
Job specific skills	You get an employee who has already been trained in skills like carpentry, landscaping, computers, and health care.	(Save time in training)
Clients who are high risk but have proved themselves	You get to give someone a chance without great risk.	(Altruism and guilt)
Employability	You get applicants who have been pre-trained in work habits and attitudes.	(Less turnover and less frustration)
Education component	You get an employee who is ready and motivated to learn. You get an employee who is more trainable. You get an employee who has a good attitude about learning.	(Save time in training)
Follow-up	We work with you to make sure the transition is smooth.	(Less turnover Less frustration)

Now you try it. Write at least five features your program offers, then turn those features into benefits. If you can, designate the ultimate benefit, too.

FEATURE	BENEFIT	ULTIMATE BENEFIT

If a customer does not need one of your benefits, it is not a benefit. Your program has lots of features. The challenge is to convert them into benefits that meet the specific needs of the customer. To illustrate, study the example below. Pick out the job developer's statement that is a benefit based on the employer's need.

Employer: "When I hire, I generally don't have much lead time. Running ads, setting up interviews, interviewing, and hiring must all happen very quickly."

Job Developer:

____ 1. Clients have generally worked at a wide variety of jobs, therefore you get someone who has been exposed to many different work projects.

____ 2. We prescreen based on your specifications. We will only send those people who meet your minimum qualifications.

____ 3. We are only a phone call away. Because we frequently have workers who have already completed training and are conducting an active job search, often we can send someone to interview the same day that you place the job order.

____ 4. Our focus is matching the right job with the right worker because we believe that retention on the job is key.

Statement 3 is the benefit a job developer would most want to emphasize. The other three statements are like offering an employer apples when he or she asked for oranges. However, statements one, two, and four could all be benefits to an employer. For example, if an employer has an opening that requires a worker with experience in several different skills, statement one would be an appropriate benefit. Number two is a benefit if the employer is tired of interviewing unqualified applicants. A revised statement four (rephrased as "you") would be appropriate for an employer who complains of high turnover.

So a benefit is only a benefit if the employer expresses a need for it.

Pretend an employer revealed the following need. What might be a benefit of hiring through your program?

Employer: "I need workers who can work independently. Often I give workers a project to complete and I have to trust that it will get done. I can't be there all the time."

Your benefit:

If the benefit you wrote says something about the ability of clients to work without much supervision, you are on the right track.

GENERAL BENEFIT STATEMENT

The selling process should begin even before you meet the employer for the first time. The more you know about the employer's needs and problems, the better your chance of convincing them quickly that your program can help. Remember, sales are based on solutions to problems. Therefore, precall planning is crucial. You should think about or research an area that may be a problem for the employer. You can get information about likely problems from:

- industry magazines and journals
- newspaper articles
- past job development records (if they exist)
- television
- past clients who have been placed with that employer

Use this information to put together an introduction to use when you meet the employer. Often, the employer will begin your meeting with a question like, "What can I do for you?" or "What brings you here?" What should you say? Prior planning can help when your tongue grows thick and your mouth goes dry.

A big mistake would be to answer:

> "I work for a program called (insert name). This is a program that helps high-risk youth and adults get work experience and education. We work with the clients for six months, then help them get a job in the private sector. I would like to talk to you about our program."

What is wrong with that opener? For one thing, it doesn't address the employer's problems and needs. The conversation is feature-oriented and of little interest to the employer.

A better approach is to open with a *general benefit statement*, which gives the employer a good reason to listen to you.

Employers will be more attentive when you talk about their needs rather than your program.

To create a good general benefits statement you will want to:

1) State a need that is common among the kind of employer you are contacting.

2) Offer a general benefit that answers this need or solves a problem.

The following are examples of good general benefit statements:

Presumed Need: Employer is swamped with applicants for an advertised job.

> "I know that with the current downturn in the economy when a local company lists a job opening, hundreds of applicants have been applying. The time it takes to screen and select those qualified for the job is enormous.
>
> I work for an organization that helps employers save time in the hiring process. We match job seekers to job openings. We use a thorough pre-screening process that matches job seekers to the specific requirements of the job as set by the employer. This saves the employer the headache of sifting through mounds of applications."

Presumed Need: Turnover in the food service industry.

> "I've been working with the food service industry for 11 years. My experience suggests that managers often struggle with employee turnover.
>
> I work for an organization that matches job seekers to job openings. Our major focus and measure of success is on the retention of our clients in their jobs. We work hard to ensure that the transition for the new worker is as smooth as possible. This helps keep turnover to a minimum."

Now try your hand at writing a good general benefits statement. Think of a business person you would like to approach, and consider what problem they might be having. Write a general benefit statement.

Presumed Need:

General benefit:

____

____

____

____

____

A general benefit statement can be used as an opening for a sales call to a new customer, for a follow-up call, or for a formal presentation to a group of people. It can also be used in a letter or a telephone script.

Before you call or visit an employer, plan a general benefit statement in your mind. Think about the biggest problem the employer might have in hiring, then think about how your clients can help solve that problem.

Once you have presented your general benefit statement to the employer, what do you do?

__ a. Go on to describe the program more fully.

___ b. Ask the employer a question.

___ c. Pause and wait for the employer to respond.

The correct response to the above is "c". You pause to give the employer a chance to respond. You need to know the specific problem the employer is having--if you don't, you really have no solution to sell. You have made an attempt in the general benefit statement to guess at an unsolved problem but don't know if you guessed correctly. Put the ball in the employer's court, and see what they do with it. The employer can respond by saying, "You are so right. Just last month I ran a newspaper ad for a hostess. I had over three hundred phone calls. Can you believe it, three hundred calls!" That is what you are hoping. If you did your homework, the employer should be indicating that you described their problem perfectly in your opening statement.

Unfortunately, job development doesn't always proceed smoothly. Sometimes, the employer just stares and says, "Uh-huh." Even tougher, the employer can object, be indifferent, or be skeptical. Whatever response you get, listen carefully to determine whether the employer is revealing a specific need, making no relevant response or revealing skepticism, indifference or objections.

The next four sections will demonstrate how to respond to what the employer says. You will learn the skills you need to get around these roadblocks and move the sales call ahead.

SKILL 1: PROBING

After you make a general benefit statement the employer may just stare at you and say nothing. Or they may talk about something irrelevant to your opener. What should you do?

Before you can convince an employer to hire, you must uncover an unmet need or unsolved problem. If the employer does not tell you about a need, you will have to probe. Probing is the skill of questioning to uncover needs and problems.

There are two kinds of probe questions that you will want to use: "open probes" and "closed probes." An open probe encourages the employer to speak freely about a topic. It can also be used to get the employer to elaborate on a topic.

A closed probe steers the conversation to a specific topic and generally requires short answers; sometimes as short as "yes" or "no."

Examples of open and closed probes:

OPEN: "What are the characteristics you look for in a new employee?"
"Could you tell me a little about your hiring process?"
"I am interested in knowing why you feel that way."

CLOSED: "Have you hired through a job training program before?"
"When you place a want ad, how many responses do you get?"
"On average, how many entry-level employees do you hire in a year?"

Write three open and three closed probes you could use during a job development call.

OPEN:

____

____

CLOSED: ____

____

____

How do you know when to use an open probe or closed probe?

Pretend for a moment that you are meeting with an employer who is quiet and introverted. Would it be best to use open or closed probes? Now pretend you are meeting with an extrovert who talks on and on. During a lull in the conversation, would it best to use open or closed probes?

The correct answer may not be what you think. You might be tempted to use open probes with introverts to get them talking and closed probes with extroverts to stop them from rambling. The opposite works better. Use open probes with articulate, talkative customers. Let them talk so they will feel comfortable. If the customer is unresponsive, withdrawn, or has a tendency toward one- or two-word answers, then it is best to use closed probes.

Closed probes can also be used to direct the conversation to a new topic. For example, if you want to discuss the prescreening service your program offers (or should be offering) then you could direct the conversation through the use of a closed probe.

> "Would having information about the applicant's work skills, work habits and attitudes, interests and dependability be of benefit -- especially having the information before the hiring decision is made?"

Notice that this question directs the employer to a benefit your program can offer over most competitors.

Generally, it is best to start with open probes. You want to give employers free rein to discuss their problems. Then take on the role of problem-solver by listening and offering solutions.

SKILL 2: SUPPORTING

The second sales skill you'll need to master is *support*. This involves acknowledging what you have found to be the employer's most pressing need and presenting information that supports the program as a way to meet that need. The more you support, the easier it will be to close the sale and make the placement.

Support statements have two parts. First, you paraphrase and empathize with the employer's need. Second, you offer a benefit that directly meets the need. An example:

Employer: "You interview someone. They come across so well. You think you've found a good employee, but it turns out they are only good at interviewing skills."

Support Statement: "I know what you are saying. It's so hard to get a handle on how good a worker really will be when all you have to go on is a 20-minute conversation. That's one of the advantages of working with our organization to fill your entry-level positions. We can give you a profile of the person we refer."

Support statements show the employer that you understand the need or problem. They also reinforce that you are there to help solve problems.

Employers will make two kinds of statements you'll want to support. First, use support anytime the employer reveals a need that can be met with a program benefit. Second, support any favorable comment the employer makes about your program or the services you offer.

There are statements an employer might make that you do not want to support.

* Do not support unfavorable comments about your program or participants.
* Do not support any need that you cannot fulfill.
* Do not support a favorable comment made about a competitor.

To check your understanding of support, take the following four-question quiz. Put a check next to the letter that best describes your first response to a business person who is expressing the problem.

1. "Finding someone who will work evening hours and weekends for just over minimum wage has been difficult. Employees seem to come and go."

___a. "What are the actual hours and starting wages?"

___ b. "Have you considered rotating the hours so that someone wouldn't have to work every weekend?"

___ c. "We have a pool of people who would be willing to work the hours and for the wages you suggest."

___ d. "It can be a time-consuming search to find the right person for the job."

2. "I am looking for someone who can relate to my customers. The people who shop here do so because they like the friendly, personalized service we provide. The clerks are on a first-name basis with the majority of our customers and remember their preferences. Our customers want that type of service. People who are just price conscious shop at Penney's or Sears."

___ a. "Let me ask you some questions about the hours, wages, and other requirements."

___ b. "I am thinking of a person we have on board right now who would meet your requirements."

___ c. "If you would hire someone through our program, it would really help the community."

___ d. "From what you have described, it sounds like you need someone who can relate to a sophisticated shopper, who has good conversational skills, is obviously interested in clothing, and who has a good appearance."

3. "Turnover has been a big problem for us. It takes me at least six months to get someone broken in to the point that they are productive for me. To recoup my investment, they need to be with me at least a year...or a year and a half."

___ a. "Let me tell you about our program. The people in our program are required to be with us at least six months, so we really get to know them."

___ b. "Turnover is costly even when no training is involved. In your situation, the six-month training periods add significantly to the cost of turnover."

___c. "How long has the average employee stayed with you?"

___ d. "Studies have shown that young workers are dependable when compared with other groups of workers."

4. "In a business like this, I have to have workers who won't steal. It is just too easy to put a few screws or nails in your pocket."

___ a. "It's hard enough just to be in business and make a profit without having your employees shoplift. It is hard to know after a short interview who will be loyal to you and who won't."

___ b. "Because we get the chance to know all of our trainees and can do reference checks, we can let you know that the person we send has a clean record."

___ c. "Do you do reference checks to be sure someone hasn't had that problem in the past?"

___ d. "Our candidates go through training classes where they are taught values like honesty, loyalty, and putting in a full day's work."

If you said that 1 and 2 were "d", 3 was "b" and 4 was "a", then you are ready to move on. If you missed one, go back and review.

To summarize: When an employer reveals a need that can be met by your program benefits, you should agree, paraphrase or acknowledge. This approach establishes empathy with the employer.

You have worked through a few examples of support in this section. Now do a few on your own. First write a statement of agreement, then offer a benefit.

Employer: "I have hired people before who just don't seem to understand the concept of coming to work on time."

Your Response:

Agreement

____

____

Benefit

____

____

____

Employer: "I can't afford to hire someone who can't work out his or her personal life. I had a kid in here last year who spent most of his workday on the phone with his girlfriend trying to work out their latest disagreement. I am not paying someone to solve his problems on my time."

Your Response:

Agreement

____

____

Benefit

____

____

SKILL 3: CLOSING

Every step in job development leads to closing the sale and getting the placement. Closing lets you test whether you have uncovered and satisfied enough needs to convince the employer.

There are two steps to closing successfully. First, summarize the benefits that the employer has accepted. Second, ask for a commitment. For example:

> **Job Developer:** "We talked about how we can pretest applicants for basic skills and for attendance and punctuality. Should I have the applicants call you directly or would you prefer that I serve as a go-between?"

Another example:

> **Job Developer:** "You said that you needed someone who has experience in rough construction, shows a healthy respect for construction equipment and is safety-minded. You also said that you think you'll have a position available in three weeks. I could start sending applicants over to be interviewed now so that when the position becomes available you will already have made the selection."

And another:

> **Job Developer:** "Ms. Kelly, we've talked about how our trainees have been through a competency-based skills training program so they'll have the work skills and attitudes that you need. We also talked about our retention services.
>
> "I'd like to send you one of our trainees to be interviewed for the clerical position you spoke of. Would you prefer that I send her directly down or that she make an appointment? Which would be more convenient?"

Notice how you review what's been agreed to, then ask for a commitment. You want to avoid asking questions that can be answered with a "no." For example, you *wouldn't* want to close with the following:

> **Job Developer:** "You said that you needed someone who has experience in rough construction, shows a healthy respect for construction equipment and is safety-minded. You also said that you think you'll have a position available in three weeks. Would you be willing to interview some of our clients?"

Look at the second example to see how you would close.

Pretend that the employer has indicated a need for workers who had been prescreened for his or her particular criteria, who wouldn't mind working part time to start and had already demonstrated good work habits. Write a good closing statement.

Job Developer:

Now imagine you are conducting a job development call and try to give your closing. You summarize the benefits accepted up to this point and ask for a commitment. If the employer is not ready to commit, the closing will fail. She may say:

> "While I do want pre-screened workers who will work part-time to start, I also need anyone I hire to be able to get along with all types of people. We work as a team here. A new team member needs to be open to work with my current employees -- many of whom have strong personalities."

Here the employer has signaled that she still has unmet needs and isn't ready to sign on the dotted line. Which sales skill would you use right now? If you said "support," you are correct. Empathize with her concern about teamwork, then tell her how clients have learned how to work in teams. If the employer is satisfied with this new benefit, try to close again. You may need to try a closing statement two or three times during a sales call.

But how do you know when you should attempt to close? Normally, the employer will let you know. When he or she indicates acceptance in some way, summarize everything agreed to up to that point and ask for a commitment. The signals may be obvious, such as a direct statement like, "I'd be willing to give this a try." However, you are also safe to assume the employer has accepted when questions become more specific, such as, "Would I call and list the job specifically with you or with anyone on your staff?" When employers ask a question like that, they already see themselves using the service; they are just working out the details. At this sign of acceptance, you should begin to close.

Here are possible **OPENING** lines for the beginning of your closing statement:

1. ·"Let's review what we've agreed to."
2. "Let's summarize."
3. "Let's go over what we've covered so far."
4. "Let's recap."
5. "We've already talked about...

Put an "X" beside the statements that are cues for you to close:

____1. "Call me next week. I need time to think about your proposal."

____2. Facial expression showing doubt.

____3. Facial expression showing interest.

____4. "I must say, you are convincing me."

____5. "It sounds okay, but is it worth the risk?"

____6. "Sounds interesting."

____7. "What if I need or want follow-up services beyond 90 days?"

Statements 3, 4, 6 and 7 would indicate you should attempt a close.

Many employers will be unwilling or unable to hire from you the very first time you make contact. For many employers, a relationship of trust must be built slowly over time. You won't always get a job placement when you attempt to close the sale, but don't be discouraged. Prepare in your mind a list of other things you could get from this employer that would be useful to the program. As the relationship is established and trust is formed, the employer may list a job.

When you do not get a job order, use a "no-fail" closing, designed to secure a favor from the employer and keep the door open for future contact. It is possible that the employer will agree to do one or more of the following:

* Allow clients to tour worksite;
* Agree to speak at pre-employment training;
* Critique your curriculum on work habits and attitudes;
* Serve on an employer advisory council;
* Commit to list future job openings with you;
* Refer and recommend your program to another employer;
* Provide information about industry trends;
* Judge an "interview competition" among clients;
* Do informational interviews with clients; and
* Act as a mentor.

Yet, even if you can develop general benefit statements, can probe, support, and close, you need a few more skills to deal with employer attitudes.

SKILL 4: OVERCOMING DIFFICULT ATTITUDES

To be an effective job developer, you must learn to handle three difficult employer attitudes: skepticism, indifference, and objection. Generally, an employer will not exhibit one of these attitudes right after you make your general benefits statement. More often, the employer will reveal an attitude only after you begin to probe. The following sections describe how to detect and handle each of these employer attitudes.

SKEPTICISM

Employers become skeptical when they do not believe your program can deliver a promised benefit. The employer may want workers who can get to work on time. You may tell about your programs strict attendance and punctuality rules. You may explain how you monitor work habits and attitudes during the client's participation in your program. The employer may not believe that you are as strict as you say you are, instead believing that all social service programs are lax.

When you encounter skepticism, you will have to show that what you are saying is true. You can offer many forms of evidence, but a credible third party or independent source is generally the most effective form.

The following are possible sources of proof:

* Testimonials

* A list of references

* An agency brochure

* A newspaper article

* Your credentials

* Data from research

* Charts, graphs, reports

How do you prove your claim is true? The three-step process for overcoming skepticism can be summarized as follows:

* I believe ....
* This is why I believe (offer proof sources) ....
* Therefore, I believe ....

To overcome skepticism, you want the employer to trust you.

For example,

> "Well, I know that you are telling me that these people have learned punctuality, but I think getting to your program every day on time is different than coming to work. We start here at 6:45 a.m. I am sure that's earlier than your school day. I just don't think it is a good test."

What should the job developer say? What would you say? Write your answer here, then compare it with the one below.

> **Job Developer:** "I can tell that dependability is very important to you. It is important to us as well. I believe that the trainees we graduate have learned a lot about punctuality and dependability. The reason I believe this so strongly is that our day starts at 9:00 a.m. If they are tardy just three times in a three month period, they are put on probation. (Job developer hands employer a policy statement). If they miss more than two days in that same period, they have to come in on their own time to make up the work. A major focus of our service is teaching our clients about the business world from the business person's point of view. I have a few testimonials with me (hands them to employer) from other business leaders in the community who talk about their experience with our clients. That's why I believe that clients are more likely to be reliable."

The more evidence you provide (especially in the form of numbers, charts, testimonials, facts, or figures), the more likely the employer is to hire from your program.

If you provide evidence that you can deliver the desired benefit, but the employer still does not believe you, then you should probe to find out why he or she remains skeptical. You may need to offer further evidence or recommendations from additional sources.

You will want to go on each job development call prepared with material to overcome skepticism. Give the employer the materials when needed, and do not feel compelled to give all employers the same set of materials. Each employer should get literature customized to his or her needs and attitude.

INDIFFERENCE

Many job developers mistake indifference for objection. But these are two distinct attitudes and should be handled as such. When employers see no need for your service or are happy with their current hiring process, they are expressing indifference.

As you recall, all sales are based on solutions to problems. You cannot sell the employers on your program if they do not see a need or a problem it can help them solve. Your challenge is to help them identify a problem your program can solve.

To overcome indifference and spotlight an unmet need or dissatisfaction, you will want to use closed probes. Sometimes you will have to ask a series of closed probes. Probes can help employers see that they are not actually satisfied with their current system of hiring.

To illustrate, assume an employer has gotten good results by running a help-wanted ad in the newspaper. He or she sees no need for your program. The job developer can help the employer see that running ads in the newspaper does not meet all his or her hiring needs. Outlined below is a partial conversation between the job developer and the employer:

Job Developer: "How do you currently find entry-level employees?"

Employer: "I run an ad in the Sunday want ads. Works like a charm."

Job Developer: "So you get an ample number of applicants?"

Employer: "Oh, yeah! Last time we ran one, we got over 200 phone calls. Hard to believe so many people would apply for the position."

Job Developer: "That must take a lot of time to answer all those phone calls and try to explain the job."

Employer: "Well, the week I advertise I don't get much else done."

Job Developer: "Actually, that is where I think we could help. If you call us first, we can check real quick to see if we have anyone who would qualify. If so, we could send them over for an interview. That would sure save you time, not to mention expense."

In this example, the job developer helped the employer see that some dissatisfaction did exist. Now consider the following statement:

Employer: "We always hire based on recommendations from current employees. We rarely look for new employees outside."

Which closed probe would be the most appropriate?

Job Developer: ( ) "How many people work here?"

( ) "How often do you hire new workers?"

( ) "Have you found that current workers give recommendations based on who they know who needs a job, or based on workers who are well-matched to the job requirements?"

If you picked the third statement, you are right. Assuming you respond that way, let's follow the conversation a little further:

Employer: "Because our employees know exactly what the job is about, they do seem to be well-equipped for finding the right worker. I think they generally recommend people with the skills we are looking for."

That time, the closed probe did not uncover any area of dissatisfaction. The job developer should continue using closed probes. For example:

Job Developer: "If you did hire someone who did not work out, would it cause a problem to let them go?"

Employer: "Actually, that happened about a year ago. It was problematic. The person I had to let go was the younger brother of one of my best employees. It was uncomfortable."

Job Developer: "I understand that. Would it be an advantage to be able to get a person who is qualified, who was recommended by us based on demonstrated work habits and attitudes, and does not come to the job with the inherent problems of being tied to a current worker?"

Examine the "cons" of the other methods of hiring. A list of cons was provided in the first section of this manual. Most of the unmet needs and areas of potential dissatisfaction will be found in this list.

OBJECTIONS

Of the three attitudes you will encounter in job development, objection is the most difficult to handle since it manifests in disagreement--even hostility.

There are two types of objection. Luckily, one is fairly easy to handle. The other takes more skill. The two types are *misunderstanding* and *perceived drawbacks*.

Misunderstanding occurs because the customer either has the facts wrong or lacks information. For example, employers may object to your program because they believe they will lose control over whom they hire. Since this is not true, you would restate the objection as a question, then provide additional information to clear up the misunderstanding. A typical exchange follows:

Employer: "I want to be the one who makes the hiring and firing decisions for my business. I am not about to give up control of who works for me."

Job Developer: "So you want to control who you hire and fire?"

Employer: "That's right. My business is only as good as the employees I have working for me."

Job Developer: "I apologize. I did not explain how we work with employers very well. You totally control whom you hire and fire. We just want to be able to refer individuals who meet your qualifications. You are the only person who can decide if an applicant would make a good employee for your company."

It is important to rephrase the objection as a question. Rephrasing clarifies the objection and demonstrates that you heard what they said. It is important to rephrase the objection in such a way that you do not imply that you agree with it.

The second type of objection is tougher: *the perceived drawback*. This results when you do not provide a benefit the employer wants or when the employer does not like something about your service or clients.

Again, rephrase the objection as a question, then minimize the objection by stressing relevant benefits. One approach is to outweigh the objection with a list of benefits.

The list of potential objections you may hear is long. However, after a few months of steady job development, you will have heard the majority. The best approach to handling objections is to plan for them and organize positive responses. While it is hard to predict which objections you might hear, here are some for which you may want to prepare.

Employer: "Are these people from welfare families?"

Response: "You are concerned that the clients we send are receiving welfare? Could you tell me more specifically why that might be a problem?"

Don't react too quickly when an employer says something like this. The real objection has not come out yet. Often, the real objection is that they believe welfare makes people lazy and thus bad employees. To deal with the objection, you could go several directions, depending on your clientele. You could say that the majority of clients are not receiving welfare. An even more effective alternative would be to illustrate how hard clients work while in the program. Do not say clients are from low-income families. It is not relevant and creates objections.

Employer: "I don't like government programs."

Response: "You are concerned that we are a government agency?"

Again, there are several ways you can deal with this objection. One way would be to treat it as a misunderstanding. Your program may be funded through a variety of corporations, foundations, governments, and schools. You may be a nonprofit. Clear up the misunderstanding about how you are funded. If you are primarily funded through government, then ask about his or her experience working with government programs. Generally, the employer objects to the paperwork. You will need to overcome the objection by pointing out that there is no paperwork.

Employer: "Programs like yours send us people who never work out."

Response: "So you have used employment training programs before and have had bad experiences? What happened?"

The way to overcome the objection will depend on how the employer responds to your probe. If he or she says that the problem was the worker didn't get along with others, stress your program's team projects. If it's a dependability problem, stress the rigorous attendance policy. You may want to discuss the program's emphasis on retention rather than just placement.

Employer: "I know someone who hired a worker through one of these programs. The person quit after two days on the job."

Response: "So your friend had a negative experience? Do you know more about why the worker quit?"

You want to probe and learn more so that you know which benefit to stress. Perhaps the worker quit because he or she was poorly matched. Since you take a more thorough job order, placements from your program last longer. Maybe the worker quit because he or she found the job was different than expected. The job previewing service should take care of that objection. But more than likely, the employer does not know any more than what was expressed -- the worker quit after two days. You might then say, "So retention is very important to you. Let me tell you what we do to increase the retention rate of our clients."

Employer: "There is too much paperwork involved."

Response: "The paperwork seemed excessive? I understand. When you work with our program, we do all the paperwork for you. And even so, there is very little to do."

The employer is probably referring to on-the-job training contracts through JTPA or some other program. The paperwork is extensive and increasing under the new JTPA amendments.

Employer: "I just can't depend on these programs to find me someone when I need them. It takes you too long."

Response: "So finding someone fast is important to you? Let me tell you how the program operates. We do not have a huge pool of people looking for jobs. We work with small numbers and provide a high-intensity, comprehensive service. We are not a labor exchange like the Job Service. If we do not have someone who fits your qualifications, we tell you. However, as an added service, we will help you find someone for the job through our contacts with other community agencies."

This employer has no doubt had a bad experience with a job developer who took a job order, then did not follow up quickly. Emphasize all you will do to help find a worker even if it is not a client. The goodwill that is created will repay your time and effort.

Write your own responses to the following objections, remembering to rephrase the objection as a question before answering it:

Employer: "Look, many of the people who end up in these government programs were nothing but trouble. Now you want me to hire them?"

Response: ______________________________

____

Employer: "You want these employees to work full time. Most of our jobs are part time and will never be full-time positions."

Response: ______________________________

____

Employer: "I need people with good attitudes. A few years ago I hired someone from some training program. That employee was nothing but trouble. I never want to go through that mess again."

Response: ______________________________

____

____

Employer: "I don't mind training people in their jobs here, but I can't make up for the last 20 years of their lives. People today seem to feel the world owes them a living. I worked to get where I am and I'll be darned if I am going to pay someone to be unproductive."

Response: ______________________________

____

____

Now here is a tough one. What would you do?

Employer: "I want someone who will fit in. Do you know what I mean? Most of our customers are white and I think our customers would be most comfortable around people like them."

Response: ____

Here is a potential response:

> "You are concerned about finding a worker who can relate to your customers? I will send the person who is the most qualified for the job based on the skills required. When I make a referral, it will not be based on race, ethnicity, gender, or religious background. Since most customers are concerned with competence and job skills, that is what I will focus on."

Obviously, this is a situation in which you must decide whether this would be a good site for any client. It is important to make it perfectly clear that you will not screen based on inappropriate or illegal criteria.

DIRECT MAIL

One of the most effective and efficient methods of employer outreach is direct mail. Direct mail has several advantages. It is very targeted and selective because you decide who will get your letter. It is also time-efficient: writing a letter, copying it, and stuffing envelopes to reach 100 employers is far less time-consuming than making 100 on-site sales calls. You can also control how many letters are sent and mail them when you choose. And, when prospective employers open your letter they are not distracted by other advertising. For at least a moment, you have their attention.

When designing an effective direct mail campaign, follow the steps outlined below:

1. Decide what you want the goal to be. Direct mail has many uses. Here are several possible goals of direct mail:

   - To pre-sell the employer before a sales call;
   - To substitute for a sales call;
   - To follow up on job development calls to employers;
   - To thank all employers who have hired from you;
   - To remind employers that your program is still in business;
   - To place specific clients;
   - To notify employers of any service changes you make;
   - To welcome new employers; and
   - To regain lost employers.

   Keep the goal in mind when you decide to write a letter. Do not attempt to make one letter serve multiple purposes. For example, do not try to write one letter that pre-sells an employer and notifies your core group of employers that you have made some service changes. To accomplish two tasks, you need two letters.

2. Decide how you want the employer to respond. Tell the employer in the letter what response, if any, is expected. Potential responses that could be requested include:

   - Call if you have any openings;
   - Call if you have any questions (don't expect a call);
   - Do nothing, a staff member will be calling you;
   - Send back the enclosed stamped, preaddressed postcard; and
   - Call if you would like someone to stop by to explain how we can benefit you.

Give the employer only one response option. Do not confuse employers by telling them to call, write or to wait for you to contact them.

3. Decide whom you want to contact. This step requires that you target those employers you really want to reach. You can target in many different ways, including:

   - By industry;
   - By entry-level job title (e.g., companies that hire data-entry clerks);
   - Geographically;
   - By usage pattern (Has the employer used your program before? Frequently? Occasionally? Never?);
   - By size of business;
   - By identifying businesses that are very similar to businesses that currently hire your graduates;
   - By turnover rate;
   - By business cycle/season; and
   - All employers who advertise regularly in the newspaper.

   You will want to pick a target group and write a letter that appeals to that specific group. The general benefit statement that was discussed in the section "Effective Sales Presentations" applies to direct mail as well. The more closely you select the audience, the more closely the need and solution can be targeted.

4. Gather a mailing list. Lists are one of the biggest problems in direct-mail marketing. As many as 25 percent of the names on a mailing list may change in some way during a single year. People are promoted, move, change employers, and retire. Businesses move, merge, and go bankrupt.

   To get a fairly up-to-date list you can try the Chamber of Commerce, an area business directory, the telephone book, and past job development records. Personalized letters get higher response than letters addressed as "Dear Employer" so you want the employer's name. While it may seem cumbersome and time consuming, it is worthwhile to call a business and find out the name if you do not know it.

5. Write the letter. To make your letters effective you will want to follow the guidelines listed below:

- Personalize the letter where possible: "Dear Ms. Smith" will get a better response than "Dear Employer."
- Hand sign each letter. Do not photocopy your signature.
- Include a P.S. in each letter. Make sure the P.S. involves a benefit. A P.S. is important because of the way receivers read their mail. The order in which people read their mail follows: to whom it is addressed, who signed it, then the P.S. The P.S. gets read before the first sentence. You will want to make the P.S. strong.
- Freely use the 18 words Yale University found were the most persuasive in the English language.

You	Guarantee	Health
Free	Results	Now
New	Easy	Money
Love	Sale	Safety
Save	Proven	Yes
Benefits	Discover	Announcing

- Keep the letter to one page. Employers won't spend time reading long letters.
- Eliminate all program and educational jargon.
- Urge immediate action in the closing. Tell employers, "Call today," or "Call now."
- Include testimonials if you have them. Testimonials are a strong sales point because they overcome skepticism.
- Use short sentences, short paragraphs and one-to-three syllable words.

6. Add emotional appeal to your letter. People buy things for emotional reasons. Here are examples of emotional appeals:

APPEAL	EXPRESSION OF APPEAL
Guilt	When you were young, someone gave you a break. Maybe now is the time to return the favor.
To be secure	You can take your chances and hire them off the street . . . Or you can let us help you.
To be healthy	Every time you hire someone, your stress level goes up. So much depends on the decision you make.
Convenience	Imagine there existed a FREE personnel service dedicated solely to making your screening, hiring, and training process as easy and productive as possible.
To be secure	You are invited to a reunion with an old friend -- the work ethic -- the idea that employees should put in an honest day's work for a day's pay.

7. Test the response between two different letters. Not all letters will get the same response from employers. Some will be very effective; others, not effective at all. You will want to measure the response rate of each letter you write. An easy way to monitor responses is to sign each letter with a different staff member's name. By noting whom the employer called, you can tabulate which letter got the highest response.

As you develop a direct mail campaign to place clients, follow the seven steps outlined above. The next few pages are sample letters. You can use them as is, or as guides for developing your own letters.

SAMPLE LETTER 1

Dear Ms. _________________:

Remember when you were young and looking for your first job? Remember how you needed a job to get experience, yet you couldn't get a job because you had no experience? Then someone gave you a break.

Now is the time to return the favor. Many of (City)'s residents are looking for jobs. They need people like you to give them a chance.

We are a private not-for-profit organization whose primary purpose is to prepare (city)'s residents for the working world. As part of that mission, we work with employers, like you, who hire entry-level workers. But we do more than help you find a worker. We measure our success by retention. We want to match the right worker to the right job.

The risk you take is minimal. By hiring an employee through us, you are guaranteed that he or she has completed training on how to be successful on the job. They've learned proper work attitude, motivation, initiative, dependability, and punctuality.

I have enclosed summaries of the experience some of our clients can bring to an employer. We are currently working to place these and other qualified workers in secretarial positions, light construction, landscaping, and security. If you are looking for workers in these or other areas, please call me at (555)-555-1212. You will help an area resident and get a hard worker!

I look forward to working with you.

Sincerely,

Hiram Fast

P.S. Would you like to know about other businesses that use our services regularly? Call now, and I will be happy to provide references and answer your questions.

For more information on these and other workers, please call 555-1212 and ask for Hiram Fast.

Jodie Sue Kelly. Work experience as a nurse's aide. High school graduate. Achieved perfect attendance award three months in a row. Is interested in working in the health care field. Extrovert. High degree of perseverance. Works well with people.

Kathy Smith. Work experience in landscaping and light construction. Studying for high school diploma. Elected client of the month January 2003. Earned perfect attendance award for two months. Diligent. Outgoing. Physically fit. Is interested in working in a job that takes her outdoors.

Tom Warner. Work experience in fast food and conservation projects. Graduated from the training program December 2002. Is interested in part-time work so he can pursue his education. Was elected crew leader by his peers. Shows initiative. Hard worker. Team player. Is flexible in work interests. Would like work in customer service.

Todd Lincoln. Work experience in chicken processing plant. Six months work experience in the program on community projects. Is awaiting scores on his general educational development diploma. Is interested in a full-time job in the construction trades. Has solid math skills. Good work habits and attitudes.

Oscar Williker. Work experience in maintenance and conservation projects. Has achieved outstanding attendance award. Wants to continue studies for high school diploma while working full-time. Is interested in continuing in the maintenance field. Gets along well with his peers. Works well without supervision. Creative problem solver.

Iva Wanna. Has experience as a receptionist and assistant secretary in the sheriff's office. Can type 35 wpm. Has general educational development diploma. Was awarded GED person of the month and outstanding attendance award. Wants to work in an office environment. Diligent worker. Good at following directions.

SAMPLE LETTER 2

Dear ________________:

It is hard to tell after a short interview whether the stranger you've just met will make a productive employee. That's why working with (program name) can make you feel so secure. We help area businesses find workers for entry-level positions. We can be your link to pre-tested workers who are eager to begin a career.

We refer only applicants who fit your needs. We can provide you with a complete profile on each applicant. You're free to hire whomever you choose. There is no government interference, and if we don't have the right applicant, we will tell you. We will not send someone unqualified.

By working with us, you get these free services:

- Help to find an entry-level worker from the pool of clients who have graduated from our program;
- Information on each applicant's background; and
- Information on each applicant's skills, interests and abilities.

We are a not-for-profit organization, funded by the city, county, and several large foundations and area corporations, so all of our placement services are free of charge.

Reduce your risk in hiring your next entry-level worker. Call the (program name) today.

Sincerely,

Anita Job

P.S. Enclosed are comments made by employers who have used us in the past. Take a minute to read them now.

SAMPLE LETTER 3

Dear _________________:

Every time you hire someone, your stress level goes up . . . so much depends on the decision you make. Yet, finding dependable, reliable employees is difficult.

Let us help reduce your stress. We offer a FREE employee-referral service to (City) area employers. As part of our service we conduct a job analysis to help you identify the skills and work habits needed for the job. At the same time, we are assessing the skills of the young people we work with to see if we have the right person for the job. This ensures a good match.

Because we are a not-for-profit funded by large foundations, area corporations, the county and city governments, all of our services are free to you and to the job seeker.

The young people we work with and help place have spent the last few months working on a variety of worksites and have performed physical work (such as landscaping, carpentry, and conservation projects) and human service work (such as helping patients in a hospital, working with children at a day care center or conducting food and clothing drives). They understand what hard work is all about and now they are ready to work for you.

So next time you are looking for a new employee, you can take your chances and hire them off the street . . . or you can call us.

Sincerely,

Juanita Urelp

P.S. Attached is a list of work-ready individuals. If you have an opening or are anticipating one in the near future, call us today.

TELEPHONE TECHNIQUES

Handled correctly, telemarketing offers enormous opportunities to job developers. Telephoning is a cost-effective and time-saving method of reaching the employer directly and getting an immediate response. A job developer can only make about six on-site job development visits per day, but can easily make 10 to 15 phone calls in an hour. The telephone is a good technique for qualifying the employer. If the employer is interested in your program, a one-on-one sales visit can be set up.

Many job developers don't like to use the phone to sell. Most of us avoid failure and rejection at all costs. It is true that job developers who use telephone marketing are rejected more than those who do one-on-one sales presentations. However, the only reason they are rejected more is because they make a lot more calls. But making more calls increases the chances of hearing, "Yes." In fact, 80 percent of all telemarketing will result in no placement, no sale. But from another angle, that is a 20 percent acceptance rate. Since telephoning takes less time than on-site presentations, more placements get made in the long run.

There are nine things you can do to be effective in making placement calls:

1. **Build your tolerance for frustration.** If you are like most people, you want immediate gratification. When placements and "yes" answers don't come right away, you can get frustrated. It's easy to quit trying and say "This just doesn't work." When making telephone calls, you'll need to appreciate that eight out of every 10 calls will not result in finding an opening or an employer who is willing to listen.

2. **Don't be a procrastinator.** Fearing failure and rejection, it is easy to put off making any employer contacts. You tell yourself, "I'll do it this afternoon;" followed by, "Tomorrow morning;" followed by, "This afternoon, I promise myself." It is easier to just pick up the phone and get it finished.

3. **Set goals and complete them.** A good rule is to try to make just 15 calls in one hour first thing in the morning. If you do that two or three times a week, you will find openings for clients.

4. **Use "no-fail" closings to avoid failure and rejection** (listed in the "Closing" chapter of this manual). Even if the employer is not hiring, ask the employer for a referral or to allow a client to conduct an informational interview.

5. **Have a list of employers' names and phone numbers in front of you before you begin to call.** Do not make up a list as you go or go through the phone book as you are making the calls saying, "Maybe I'll call Aamco. No. Acme Feeds would be better. How about Barbie's Boutique." Make up a list,

prioritize the potential employers and make the calls. Do not skip around on your list. Just make the calls.

6. **Have all your materials in front of you.** You will need a pencil, paper, a prepared script, a calendar, your prospect list, a list of all the features and benefits of your program, a list of objections and ways to overcome them, and a list of "no-fail" closing options. A prepared script is a good idea for several reasons. It will help you know where you are headed and what you want to say so you'll feel more comfortable and be more consistent.

7. **Practice sounding spontaneous.** Practiced spontaneity may sound like an oxymoron, but it is important that the script not sound like a script. It should sound fresh, energetic and motivating rather than rehearsed.

8. **Keep detailed records concerning each call.** You will want to be able to review your performance over time, as well as remember what happened with each call. Note every important aspect of the call--including whether the employer may be amenable to future contact.

9. **Reward yourself.** After you complete all your planned calls for the day, do something for yourself. Compliment yourself. Take a break. Get some coffee. Tell a coworker.

10. **Don't put down the phone until you've made all the calls.** Once you place the hand set back in the cradle, you have to talk yourself into picking it up again. Keep the phone in your hand until all the calls are made.

As mentioned in item six, it is best to work off a script in opening your phone call. This way, you will know exactly what you want to say and won't get tongue-tied. You may want to try the following telemarketing openings:

Opener #1: Phone call after a mailing.

"Hello, Ms. Wanahyre? This is Wanda Place with the Annapolis Service Program. How are you doing today? That's good. The reason I'm calling is because recently we sent some letters and brochures, and I wanted to know whether you recall seeing one of them?"

It doesn't matter whether the employer remembers seeing the letter. Some people will say, "The Annapolis Service Program. I am not really sure. Maybe." Others will say flatly that they did not receive a mailer. Others will say they did, even if they didn't.

If they say they didn't or might have, the job developer might say,

"Well, if you are like me, you get a lot of that sort of thing in the mail. I understand how it could be overlooked. We sent our letter to let you know that the Annapolis Service Program has a group of clients about to graduate from the program and they will be out looking for entry-level jobs in the community. We are trying to identify employers in the area who are hiring or are planning to hire in the near future. We would like to be able to tell the people we work with where there might be openings."

If the employer said, "Oh, yeah. I saw that mailing. It had a brochure in it," the job developer might say,"

"Great! I'm glad you remembered it. As you recall, we are the Annapolis Service Program. We have a group of people who are about to graduate from the program and are looking for entry-level jobs in the community. We are trying to identify employers in the area who are hiring or are planning to hire in the future. We would like to be able to tell the people we work with where there might be openings."

Opener #2: The added service approach.

"Hello, Mr. Kelly? This is Shesa Gotaplace with Annapolis Service Program. How are you? Good. The reason I am calling is to tell you about some terrific people who are looking for entry-level jobs in the Annapolis area. They have been working on a variety of projects in the community, such as landscaping, carpentry, and conservation, and have been helping at daycare centers, conducting food and clothing drives, and working with patients in the hospital. They are graduating from our program and I believe they'll make excellent entry-level employees. Each one has completed four months of classes on work attitudes and good work habits.

"We are trying to identify employers in the area who are hiring or are planning to hire in the future. We would like to be able to tell the young people we work with where there might be openings."

Opener #3: The employer who has not used the program in a while.

> "Hello, Mr. Kelly? This is Ima Trainee from the Annapolis Service Program. How have you been lately? Good. I was looking over some materials the other day and I noticed that we haven't had the privilege of working with your company for several months. I am calling to see if you have any entry-level positions open that we could help you fill."

You might have to add, "Is there a problem that I should be aware of?" If the employer is upset about a bad placement, you should let him or her vent. This situation will be less like to arise if you follow up with the employer periodically during the initial months after the placement. That way, you'll have fewer of these surprises.

If the employer is upset, this call could help soften his or her view. If he indicates that there was a problem, then the job developer might say something like:

> "I understand that, Mr. Kelly, and I would like you to know that I am going to go back and review the file on that client. I am not familiar with the details. However, let me assure you that we have redeveloped many of our internal systems since then, and I believe our placements are now much stronger. I do hope you will give us another chance to prove that we can do better."

Opener #4: The survey or marketing research approach.

> "Hello, Ms. Romeo? This is Juliet Scott with Annapolis Service Program. How are you? Good. I am calling because we are doing market research and I would like to ask you a few questions about the skills and attitudes you think are important in an entry-level employee. I have a few quick questions that should only to take three minutes of your time."

The survey could take one of two tracks. First, you could ask subtle questions to gather information for a future mailing or call. Second, you could ask questions that whet the appetite of the employer.

Opener #5: The referral approach.

> "Hello, Ms. Estep? This is Sally Thomas with Annapolis Service Corp. How are you? That's good. A mutual friend of ours, Hesa Man, suggested I give you a call. He thought I might be able to help your company the way I have been able to help his."

Opener #6: The question approach.

"Hello, my name is Ralph Smith. I am calling about a free personnel service that has helped more than 150 local businesses hire talented workers. How does that sound to you?"

Opener #7: The qualifying approach.

"Hello, my name is Jodie Sue Kelly. I work for an agency that provides academic and occupational skill training to area youth. Currently, many of those youth are nearing graduation and will be out seeking full-time entry-level employment. I am trying to identify businesses in the area who may be hiring now or in the near future who would also be interested in interviewing some of our graduates."

* * *

To make your pitch, of course, you will need to talk to the business manager, owner, supervisor, or director of personnel. Who you talk with will vary from business to business. One way to know whom to ask for when you call is to call in advance and ask the name of the person in charge of hiring. You can then call back and ask for the individual directly.

More troublesome is how to get past a secretary. In many businesses, secretaries screen all the incoming telephone calls. They'll ask you, "Who is calling and what is this regarding?"

How do you get through to your prospect? Try these techniques:

1. Tell the secretary who you are and why you are calling.

2. Call early in the morning or late in the afternoon. Many business owners come in before or leave after their secretarial help. Often, you get right through.

3. When you call ask for the manager by first name and use only your first name. "Is Max in? This is Jodie."

4. Enlist the secretary's help. Ask him or her the best time to call.

5. Send the employer a letter saying you'll be calling Tuesday afternoon. Then call and say, "This is Jodie. Max is expecting my call."

6. Call a different department, such as shipping. Ask for the person to whom you wish to speak. Shipping will tell you that he or she doesn't work in that department and may connect you directly to your prospect. In this way, you are "going around" the secretary.

7. Use a referral's name. You normally will get through if you can say, "A friend of his, Mary Smith, gave me his name and suggested that I call him."

Getting Organized – Managing Time and Paperwork

TIME MANAGEMENT TIPS

Tool 7a has outlined many job development tasks that must be done. The question you are probably asking is "When will I find the time?" Luckily, much of the initial work has already be done. You have sample direct mail letters, telephone scripts, forms, and a fully developed placement system. These systems alone should help.

The amount of time needed for job development depends on several factors: placement goals per month, economic conditions of the area, the intensity of self-directed job search, and the experience of the job developer. Given a placement goal of five or six clients per month, a moderately active self-directed job search component and a mediocre economy and new job developer, plan for ten to fifteen hours per week. A good rule of thumb is to plan on two to three hours per placement.

Here are a few rules to live by:

1. Use telephone calls to identify prospects. It is time-efficient.

2. You can send out 100 letters much more quickly than you can make 100 in-person sales calls.

3. Encourage clients to conduct their own job searches. It is better to have 30 people looking for jobs than to rely on one job developer.

4. For two or three weeks, log your job development activities. Analyze which activities brought you the best results. Examine whether you are spending your job development time wisely. For example, if you spent five hours writing letters and found two openings but spent four hours on the phone and found six openings, shift more of your time to the phone.

5. Let clients and employers know when you are available for phone calls. Interruptions slow your productivity.

6. Get clients to help stuff envelopes to employers. Ask them to help address the envelopes. It is their job search, so get them involved.

7. Set goals and objectives for the week--for example, 20 phone calls, 10 letters, and 2 on-site cold calls. Then work to meet those goals.

8. Do job development that is specific to a client you have on board. It is unproductive to do "general" job development to find jobs for which no client qualifies.

9. If you don't have any clients nearing completion of training, don't do much job development. Never do job development for job development's sake. It is counterproductive. When employers say they have an opening, you'll have to say that you don't have anyone. It can lead to ill will.

10. Call employers when they are most likely to be in: early in the day, between 11:30 a.m. and 12:00 p.m., and from 2:30 p.m. to 4:00 p.m.

11. If you find that something is not working or is costing more time than it's worth, change it. Over time, job developers create their own styles. What works for one may not be effective for another. You will settle into your own style.

FORMS AND ORGANIZERS

In previous sections, you had a chance to review forms and procedures to help refine your job development and placement procedures.

There are a few more organizers that you may find helpful. For example, each program should develop and maintain a job development log. The log would contain information on each employer contact. One of the most depressing feelings you will ever have as a job developer is when an employer cuts you off because a client hired a year ago did some terrible deed. When you are blindsided, it is very difficult to go on with the sales call.

To prevent this, create a binder or dedicate a file drawer to job development contact records. The following forms should be in place for each employer: Employer Profile, Contact Log, and Completed Job Order Forms. Each is described here, and you will find sample forms on the following pages:

The Employer Profile: The employer profile is a list of key information. Depending on your need, the enclosed form can be copied and filed: by entry-level position and by likely month of hire. Clients could use the "entry-level" position file to search for employers they'd like to contact. The monthly file could be used to help you remember which employers might be hiring.

The Contact Log: This form is useful for logging all contacts with the employer. The history is useful for new job developers and for refreshing your memory. If an employer lists a job order with your program, log it. Also note which client you sent to the interview. These notes need not be extensive. The contact log should be attached to the employer profile.

The Job Order: You may remember this form from an earlier section (we have reprinted the sample form in this section for your convenience). When you (or even a client) find an opening, the job order form should be completed and filed. The job order gathers detailed information and serves as an excellent profile of the business. Some agencies use the job order to replace the employer profile. Other agencies use both. The drawback to replacing the employer profile with the job order is that no profile would exist if no job order has ever been written.

Three additional organizers may be helpful: the Follow-up Log, the Job Tracking Roster, and the Job Referral Card.

The Follow-up Log: This form can give you a visual picture of when follow-up visits are due. When a client gets a job, fill in his or her name, the date of hire, and the dates for the first, second, fourth, eighth, and 12th weeks on the job. As you complete the follow-up call, put an x over the date.

The Job Referral Card: This can be printed on letterhead or on a special card. It can be given to the client to take on the interview. The card reminds the employer that the interviewee came from your program. Oddly enough, job developers who use these cards claim they give the applicant more confidence. It also lets the employer know that the job developer has specially selected this client for the job. It helps the employer distinguish between clients applying on their own and a client who was referred by staff.

The Job Tracking Roster: This form is a quick listing of the job orders that have been taken.

Forms that could be placed in the client's file would include (see Tool 8a for examples):

The Employment Contract
Presenting the Client
Interview Debriefing: The Client
Interview Debriefing: The Employer
The Budget Sheet
Job Previewing Worksheet
Follow-up with the Client
Follow-up with the Employer

You will no doubt want to experiment with an approach that works for you. If you do not find that a form is useful, modify it or don't use it. You will, however, want to strongly consider the Job Order Form, Contact Log, and the Follow-up Log.

Employer Profile

Business Name: ______________________________

Address: ______________________________

Phone: ______________ **Fax:** ______________

Contact: ______________________________

Secretary's Name: ______________________________

Type of Business: ______________________________

Entry Position: ______________________ **Wage:** ______________

Entry Position: ______________________ **Wage:** ______________

Entry Position: ______________________ **Wage:** ______________

Entry Position: ______________________ **Wage:** ______________

Total Number of Employees: ______________________________

Number of Entry Level Employees: ______________________________

What is the current hiring process? ______________________________

____

What process does the employer want the program to use? ______________________________

____

Is the business most likely to hire in certain months? [ ] Yes [ ] No.
If so, how many per month do they anticipate?

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

Contact Log

Business: ____

DATE	INITIALS	NATURE OF CONTACT

The Job Order

Business Name ______________________________ **Phone** ________________

Address ____

Contact ______________________________ ⑤ **Owner** ⑤ **President** ⑤ **Manager** ⑤ **Personnel**

Secretary ____________________ **Name of Business/Product** ______________________________

Department ____

POSITION TO BE FILLED

Job Title ________________

Duties (Star the 3 most important) ____

____

Describe an average work day. ____

____

Describe the 3 best employees you have ever hired and the characteristics that made them special. ______________

____

What skills should the applicant possess? ____

____

What kind of person are you looking for? ____

____

Are there any physical or medical requirements for the job? ______________________________

Who will the position report to? ____

What is his/her background? ____

____

How closely is the worker supervised? ____

What is the interview process? ____

____

How long does each interview last? ____

Do you give any tests? ____

How do you like to see a prospective employee dressed? ______________________________

____

How urgent is it for you to hire right now? ____

What is your hiring time frame? ____

RETENTION QUESTIONS

Are there promotion possibilities? [ ] yes [ ] no If yes, describe. ______________________________

____

Where did the person who last held the position go? ______________________________

____

Turnover rate in this position in last 12 months. __________ **Why?** ______________________________

Description of work sites/working conditions. ______________________________

____

FOLLOW-UP LOG

CLIENT	DATE OF HIRE	1ST WEEK	2ND WEEK	4TH WEEK	8TH WEEK	12TH WEEK

COMPENSATION AND BENEFITS

Wage $ ______________________________ **Per** ____________ **Increases? (yes or no)**

When is the first review? __________________ **How much can it be worth?** ____________________

Profit sharing? (yes or no)

Please check all that apply:

Medical	Disability	Uniforms	Employee Discount	Life Insurance	Vacation	Meals	Dental Plan	Holiday Pay	Pension	Sick Leave

HOURS PER WEEK			DURATION		
20 or Under	30 or Under	40 Hours	1-14 Days	14-150 Days	Over 150 Days

SHIFT				DAYS						
Day	Swing	Afternoon	Grave	SUN	MON	TUES	WED	THURS	FRI	SAT

PROCEDURE (Please fill in information)						
# of Openings	# to Refer	Call First	Send Direct	Send Resumes	TJTC	Est. Start Date

BUSINESS INFORMATION								
Number of Regular Employees	Subsidized Trainees	Why is There An Opening?				Is the Employer Willing to Hire After Training?		
		Refill	New Position	Lay Off	Other	Yes	No	N/A

Number of years in business:

EMPLOYEE PARTICIPATION IN OTHER SUBSIDIZED TRAINING [ ] YES [ ] NO				
Youth OJT	# of Positive	# of Negative	Placement	Other Programs

Current hiring freeze/lay off? [ ] Yes [ ] No If yes, positions affected: ____

Reduction of non-overtime hours of unsubsidized employees? [ ] Yes [ ] No

If yes, explain: ____

Less than two weeks training required? [ ] Yes [ ] No

OJT Trainee receives same fringe benefits as current employees? [ ] Yes [ ] No

If no, explain: ____

What equipment/training/other services does employer normally provide? ____

____

Completed by: ____ Date: ____________________________________

JOB REFERRAL CARD

TO: ____
(Name of Representative and/or Organization)

____
(Address)

This card is to introduce ________________________________

who is interested in and may qualify for a position with your organization.

S/he is interested in: ________________________________

____

____

If you have any questions, please contact our representative:

______________________________ **Phone:** ____________

Thank You For Your Consideration Of Our Referral.

\- -

FOR FILE

Name of Referral:	
Referred to:	
Date:	**Comments:**
Referred by:	

Job Tracking Roster

Date	Business Name and Contact	Position Open	Wage	Hours	# of Openings	Application Process	Possible Candidates

Suggested Readings

Books:

Compelling Selling. Philip R. Lund. Amacom. 1978.

Handbook of Small Business Advertising. Michael Anthony. Addison-Wesley Publishing Co. 1981.

How to Master the Art of Closing Sales. Sal. T. Massimino. Amacom. 1981.

Positioning: The Battle for Your Mind. Al Ries and Jack Trout. McGraw Hill Book Company. 1986.

Service America! Karl Albrecht and Ron Zemke. Warner Books. 1985.

Services Marketing. Christopher H. Lovelock. Prentice Hall. 1991.

Strategic Marketing for NonProfit Organizations. Philip Kotler and Alan Andreasen. Prentice-Hall, Inc. 1987.

Telemarketing Campaigns that Work! Murray Roman. McGraw-Hill Book Company. 1983.

Articles:

"What Motivates Employees? Workers and Supervisors Give Different Answers." Kenneth Kovach. Business Horizons. September/October 1987. Pages 58-65.

"Getting Employee Commitment." Keith Denton. Management Solutions. October 1987. Pages 17-24.

"A Comparison of the Relationship of Commitment to Turnover in Recent Hires and Tenured Employees." James Werbel and Sam Gould. Journal of Applied Psychology. Volume 69. 1987. Pages 687-690.