

Report 7: Research Report

Career Conversations: The Development, Implementation and Evaluation of an
Innovative Human Resource Intervention for Small to Medium Businesses

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Career Conversations Program

Meeting Workplace Skill Needs:
The Career Development Contribution

March 2010

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Funded by Human Resources and Skills Development Canada (HRSDC)
under the Workplace Skills Initiative (WSI)

EXECUTIVE SUMMARY

Background

Career development in today's economy requires a dynamic, reciprocating process in which the employee is willing to engage in career development and the employer is willing to allocate the resources to encourage it. Yet, despite the advantages career development provides, few career development services are available for working adults.

Small-to-medium businesses (SME's) in particular face certain challenges in supporting career development in their places of work. SME's refer to organizations with less than 500 employees. Hughes, Bimrose, Barnes, Bowes, and Orton (2005) highlight that the typical route for smaller firms to compete for business survival involves focus, differentiation, and flexibility, rather than volume and diversity/coverage. Although company activities are often highly specialized, roles within the organization generally are not. There is less infrastructure in small to medium businesses than in larger organizations, fewer 'support' functions, as well as broader individual responsibilities. In particular, SME's do not tend to have human resources departments that manage employee training and development initiatives. Taken together, these characteristics represent a very different context for workforce development than what exists in larger organizations.

This report provides the results and description of research to evaluate an innovative human resource intervention that was developed to fill this current gap in career development services by creating a career development tool (Career Conversations) that could be used with working employees in SME's. Career conversations refer to a career related dialogue between managers and employees that is supportive of employees' career management. This research was part of a larger project conducted by the Canadian Research Working Group on Evidence-Based Practice in Career Development (CRWG) entitled, "Meeting workplace skill needs: The career development contribution". The career conversation intervention is one of three, workplace based career interventions that were developed, implemented and evaluated within Canadian SME's.

Objectives and Research Method

The Career Conversation project involved training SME managers how to conduct career conversations with their employees, having them conduct career conversations in their places of work, and interviewing both employers and employees about their experience.

The process began with two two-day career conversation training seminars that were held for the managers approximately at the same time; one in Vancouver and one in Calgary. The seminar had five objectives: (1) to enhance managers' understanding of career conversations, (2) to examine the potential challenges to implement career conversations in the managers' place of work, (3) to review the managers' personal assets and resources accessible in successfully engaging in career conversations with their employees, (4) to enhance the understanding and abilities of the managers by practicing conducting career conversations, and (5) to develop action plans for addressing challenges in conducting effective career conversations in the managers' place of work (Borgen, Lalande, & Butterfield, 2008b). The facilitators provided examples, resources, and materials to the managers, including: the *Orientation to the Use of Career Conversations: Participant's Guide* (Borgen, Lalande, & Butterfield, 2008b) and *Orientation to Career Conversations: Employee Workbook* (Lalande, Borgen, & Butterfield, 2008).

Employee recruitment posters were placed at the managers' place of work after the training seminar. Once the employees were recruited, the managers were informed of their participating employees. The employees were asked to complete the *Orientation to Career Conversations: Employee Workbook* (Lalande, Borgen, & Butterfield, 2008) before attending their career conversation with their manager. When they were available to do so, the managers and employees scheduled and completed a career conversation.

Data Collection and Analysis

At the end of the manager training seminar, each manager was asked to complete a questionnaire regarding the effectiveness of the workshop. They were contacted for an interview after they had completed their first career conversation with an employee. The interview focused on whether the manager training workshop prepared them for the interview. Managers were interviewed again three months after completing their first

career conversation with an employee. This interview employed the Critical Incidents Technique (CIT) (Flanagan, 1954), to determine what employers felt helpful and not helpful in conducting career conversations with their employees, as well as what they would have wanted to make the conversation more successful. A final interview was held six months after the initial conversation to verify the summary of the critical incident interview and to obtain any further reflections by the managers. The managers who withdrew from the research following the seminar were also interviewed to better understand the reasons for not continuing with the research.

Employees who volunteered to participate in the study were provided an employee career conversation workbook to be completed before the career conversation. As with the managers, the employees were contacted right after the career conversations. An in-person CIT (Flanagan, 1954) interview was arranged utilizing a semi-structured interview guide that asked employees what they found to be effective in the career conversation, what was not effective, and whether there were things that would have been effective but were not included. Three months following the career conversation, the employees were contacted again to review the data analyzed from their first interview. Six months after the career conversation, the employees were contacted to arrange for their last interview in the research study. The intention of this interview was to better understand the employees' perspective of the ongoing impacts of participating in career conversations with their manager.

Results

Out of the 16 managers who participated in the career conversation training seminar, the research sample consisted of up to 13 managers and a total of eight employees who represented a variety of industries and occupations. Although it is difficult to generalize from the evaluation results due to the small sample size, the findings indicate that career conversation training and implementation have value for managers, employees and SME's.

The feedback indicated that the manager training achieved the objectives and the impact of the training seminar persisted over six months. The managers reported that the training increased their (a) understanding of the aims, objectives and how to conduct career conversations, (b) overcoming challenges to implementing career conversations,

(c) their personal assets and resources for conducting career conversations, and (d) how to develop action plans to overcome challenges to conducting career conversations. The feedback about the seminar was primarily positive. They indicated that they liked the seminar topics, the diversity of seminar experiences, and the group training format. These results were maintained in the first and three-month follow-up interview with managers, indicating that the knowledge and skills taught in the manager training seminar persisted.

The results from the analysis of the audio recordings of the managers' career conversations with their employees suggest that the managers utilized the communication skills that were taught in the seminar. They also followed the career conversation format that was reviewed in the seminar.

The evaluation of the manager training seminar was overwhelmingly positive, but there were a few suggestions and concerns. Although this feedback may reflect the individual needs and context of the training seminar, it could be revised accordingly and further evaluated in the future. The evaluation results indicate that the training seminar could have put more emphasis upon how to overcome the challenges of implementing the career conversation intervention in the workplace. A review of possible strategies for garnering this support could have been helpful to include during the training seminar. However, all the manager training participants did not have the support of their organizations for implementing career conversations in the workplace prior to the training. Addressing this issue may not be as important if the managers who receive the training already have the support of their senior management. In addition, the economic context dramatically changed during the project, resulting in downsizing and layoffs in many organizations. The difficulties in implementing career conversations within SME's may reflect changing priorities within this context.

Another improvement to the training seminar could also include focused discussion regarding adapting the career conversation to particular employee needs and how to utilize the employee workbook to support this process. Strategies could also be reviewed for increasing the options for employee career goals (other than advancement) within an organization. This may be useful in SME's where limited opportunities for advancement exist.

The Impact of the Career Conversations on Employees

Although it is difficult to generalize the evaluation results regarding the employees' experiences of career conversations due to the small sample size, the results were rich and informative. The feedback about the experience and impact of career conversations on employees was overwhelmingly positive, in that 85% of the feedback referred to helpful, as opposed to unhelpful aspects of the conversations. Sixteen percent of the total number of reported incidents referred to suggestions to improve career conversations.

The employees reported in the follow-up interviews that successful career conversations had a particular process that resulted in beneficial outcomes. The direct supervisor or manager, as opposed to an external consultant, was identified as the best person to conduct the career conversation. Prior to the conversation both the manager and the employee needed to prepare so as to provide realistic expectations and an individualized focus for employees. The process of productive career conversations was identified as involving the use of good facilitation skills and questions by the manager. This process allowed for the disclosure of challenges, frustrations and expression of emotions. Employees thought that good questions were straight forward, well sequenced and not too broad. Certain conditions fostered a positive interpersonal climate for the career conversation including being realistic and having a comfortable, open flow of dialogue. This was enhanced by having a manager who was perceived as being open and approachable. Having the career conversation at the workplace and on company time was also reported as being helpful, however, it was important not to have any distractions during the conversation. It was also helpful when managers understood the employee as a person, believed in the employee's abilities and encouraged them to make individual plans toward goals. Useful topics during the conversation included the employee's current work and future goals. It was also helpful to utilize self exploration tools, and be offered information about particular occupations or company specific career paths. Multiple or two-part career conversations were considered better than having a single conversation.

One of the beneficial outcomes of career conversations was that employees felt empowered to achieve their goals and participate in personal development. Employees

had increased personal insights about their wants and needs that resulted in intentional improvements at work and future goal setting. Specifically, they had increased self-knowledge, were able to look inwards, could see how things change, and the ability to identify skills and attributes. There was also a sense that the company cared for the employee contributing to increased motivation to participate in the conversations and achieve goals. The employees reported increased trust and more open communication with the managers after the career conversation. They also learned from having their manager conduct the conversation because they understood the work situation and had a similar career path.

The percentage of comments in each category suggests that some incidents were more helpful for the employees. The following categories have the highest percentage of helpful incidents (63%) (a) initiating and assisting communication, (b) discussing work, goals, and future, (c) open and genuine interpersonal interaction, and (d) employers qualities and approach. These categories highlight the importance of the communication skills utilized by the manager who conducts career conversation, as well as focusing on the topics of the employee's work goals and future. The emphasis in the manager training seminar on communication skills training as well as the focus of career conversations is supported by this feedback. The incidents that were not helpful were (a) distractions and restrictions, (b) a lack of preparation, and (c) problems with initiating and assisting communication. These unhelpful incidents emphasize the importance of managers using good communication skills and taking the time to prepare for each conversation. Feedback from employees six months after the career conversation suggested that the perceived benefits of career conversations persisted, as did the identified processes that facilitated successful conversations. In particular, employees learned how to achieve career goals and the conversations helped them consider these career goals. They felt more committed to the career goals and the conversations were a beginning for personal development. It was important, however, that the manager who conducted the career conversation needed to follow-through with stated intentions after the career conversation. If this did not happen, it could result in employee mistrust of the manager and the experience of not being supported.

After the first formal career conversations, employees and managers were more likely to participate in brief, informal ongoing communication rather than additional formal conversations. Career conversations did not continue, even though employees desired more conversations, if managers did not initiate them. Having the possibility for advancement within the company and the perception that the company had an interest in their career development encouraged employees to participate in future conversations.

Impact of Career Conversations on Organizations

Although the direct impact of career conversations on the businesses was not measured, the results indicate that the outcomes are likely to be very positive. Six months after the initial career conversation, there is evidence to suggest that career conversations had positive impacts on the managers and employees. Managers reported wanting to continue career conversations and were interested in improving how to conduct conversations. They believed that career conversations had a positive influence on their roles as managers and improved their relationships with employees. They reported beneficial impacts upon the employee's career development and workplace performance, such as making more of an effort in the workplace, taking a course, and following up with the manager's requests. Career conversations increased their awareness of discrepancies between employee skill levels and the organization training program qualifications resulting in the need to rectify this issue. These results suggest that career conversations have the potential to benefit businesses by (a) improving manager-employee relationships, (b) improving employee work performance, (c) aligning employee goals with organizational goals, and (d) providing more meaningful training programs. Employees reported increased ability to formulate career plans that aligned with the workplace needs. Supporting the employees' career management in a systematic way benefits organizations in achieving their business goals.

The career conversation intervention has been demonstrated to have value in some Canadian SME's. This is an intervention that requires moderate resources for implementation in companies where human resources support is minimal. To implement career conversations in a business requires manager participation in a 12 hour training seminar. Both employers and employees need to spend preparation time to prepare for

each conversation that can range from 15 minutes to an hour. The potential reported benefits are extensive considering this limited investment of resources.

It is also important to note that, in order to benefit from career conversations, organizations need to support them. Some managers were not able to conduct career conversations following their training seminar. They cited lack of support from others within the workplace and the organization's structure and lack of resources to support career conversations as being particularly problematic.

Recommendations

The findings of this research suggest a number of possible avenues for the use of career conversations and further research. These important recommendations for follow up are listed below.

Recommendation 1: Promote the use of career conversations in SME's

Because career conversations require few resources and have demonstrated positive outcomes for employees and managers of SME's it is important to have more SME's adopt this practice. To this end the results of this research needs to be widely disseminated to SME's in Canada. They also need to be informed of the availability of the resources for conducting career conversations:

1. Orientation to career conversations – Manager Guide.
2. Orientation to Career Conversations – Facilitator Guide.
3. The Career Conversations: Employee Workbook.

Although these resources are available on the Career Development Foundation Website, they should also be available in organizations that serve SME's such as the Chamber of Commerce and small business development services.

Recommendation 2: Recommend that managers receive career conversation training

Although the resources are available for managers to conduct SME's we recommend that they receive formal training before implementing this strategy in their businesses. This research highlights the importance of the use of communication skills and knowledge about the career conversation process in facilitating successful career conversations. The career conversation manager training has demonstrated that managers

acquire these abilities from participation in the training. Scandura (1992) identified seven types of relationships that can result from dysfunctional career development interventions in the workplace, particularly mentoring. These include negative relations, sabotage, conflict, submissiveness, deception, and harassment. He concluded that negative mentoring relationships can be quite costly to organizations.

The career conversation training programs should be offered by qualified professionals and advertized to SME's wherever the resources are made available. It is also important to train additional training professionals who can offer career conversation training in a variety of Canadian locations.

Recommendation 3: Replicate the evaluation research with different samples

This evaluation research should be continued with a variety of different types of businesses to determine if the results can be generalized across different sectors. It would also be important to include larger samples of types of employees and managers to determine if outcomes vary accordingly. For example, employees who represent different cultures may respond to career conversations in different ways. These kinds of results would have implications for the addition of information regarding cultural sensitivity to the career conversation training.

Recommendation 4: Utilize a quantitative evaluation methodology for future research with larger samples

Now that the outcome factors have been identified, standardized measures can be utilized with larger samples of employees to determine pre and post test evaluation results. This will improve the generalizability of the results.

Recommendation 5: Conduct research to determine the impact on organizations using career conversations

When a SME adopts the career conversation strategy within their business, they should be invited to participate in research to determine the impact on factors such as employee turnover, employee training, and profit/loss. As the numbers of businesses that utilize career conversations increases, it will be possible to determine the impact of this strategy on the organization relative to the resources required. Considering the potential value of career conversations for businesses that was indicated by the positive results of this research, it is important to demonstrate these results. The implementation of career

conversations as a regular business practice has demonstrated value for employees, managers and, very likely, the bottom line of businesses as they navigate a dynamic and competitive global context.

ACKNOWLEDGEMENT

The Canadian Research Working Group for Evidence-Based Practice in Career Development (CRWG) gratefully acknowledges the support of Human Resources and Skill Development Canada.

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THE VALUE OF CAREER CONVERSATIONS IN CANADIAN SMALL TO MEDIUM BUSINESSES

The Research Context

Within the current dynamic economy, both organizations and employees need to reposition themselves to achieve their goals. Employers today need flexibility to adapt business plans and operations to ever changing circumstances, such as an economic recession. Similarly, employees must continually update their skills and be self-reliant in order to survive within the ever-changing landscape of work (Collard, Epperheimer, & Saign, 1996; Duxbury, Dyke, & Lam, 1999; Arthur, Khapova, & Wilderom, 2005). Career development in the workplace provides a mechanism for aligning the goals and needs of organizations with the goals and needs of employees. Organizational career support and individual career management need not be regarded as mutually exclusive, as employee career management remains an area of influence for organizations (De Vos, Dewettinck, & Buyens, 2009). Career development support by employers has been found to encourage employees to undertake career self-management initiatives, influencing their employability (Sturges, Conway, Guest, & Liefoghe, 2005) and to affect employees' commitment to their employer (De Vos et al. 2009).

Career development in today's economy requires a dynamic, reciprocating process in which the employee is willing to engage in career development and the employer is willing to allocate the resources to encourage it. Yet, despite the advantages career development provides, few career development services are available for working adults. As part of the Canadian Research Working Group on Evidence-Based Practice in Career Development (CRWG), Magnusson and Lalande (2005) conducted a survey of agencies and practitioners providing career services in Canada: only 11.6% of the agencies specifically targeted clients who were already working. Moreover, reviewing career development practices in Canada, the Organization for Economic Co-operation and Development's (OECD) Education Committee and its Employment, Labour and Social Affairs Committee offered this feedback: "...career development services for adults are based largely on a crisis-oriented model addressed to specific target groups

rather than a proactive development model engaging all Canadians, including those in employment” (Tabet, 2003, pg. 4).

Small-to-medium businesses (SME’s) in particular face certain challenges in providing career development services in their places of work. SME’s refer to organizations with less than 500 employees. Specifically, Hughes, Bimrose, Barnes, Bowes, and Orton (2005) highlight that the typical route for smaller firms to compete for business survival involves focus, differentiation, and flexibility, rather than volume and diversity/coverage. Although company activities are often highly specialized, roles within the organization generally are not. There is less infrastructure in small to medium businesses than in larger organizations, fewer ‘support’ functions, as well as broader individual responsibilities. This context leads smaller companies to be typically very lean, and career ladders to be minimal. In particular, SME’s do not tend to have human resources departments that manage employee training and development initiatives. Taken together, these characteristics represent a very different context for workforce development than what exists in larger organizations.

The results of a recent study of Canadian SME employees and employers (Baudouin, 2010) suggested that “there are still significant career development and training needs that are not met or could be better met” (p.). There is a need to have a means to better align employee skills and interests with workplace duties, responsibilities and tasks. A need was also expressed by workers to engage in career planning activities and have increased communication with their managers. The managers surveyed agreed with these findings. The least satisfied needs included future opportunities (a) career plans, (b), learning and training, (c) improving the work atmosphere, (d) advancement opportunities, and (e) work relations. Managers also expressed an interest in providing assistance with employees’ career planning rather than having them seek this help outside of the organization. The participation of career planning, training and achievement of career goals was considered to be beneficial to both the employee and the company.

This report provides the results and description of research to evaluate an innovative human resource intervention that was developed to fill this current gap in career development services by creating a career development tool (Career Conversations) that could be used with working employees in SME’s. Career

conversations refer to a career related dialogue between managers and employees that is supportive of employees' career management. The goals of the career conversation research included: (a) developing and pilot testing a workplace career development intervention: a career conversation, for supervisors and employees within SME's, where access to human resources are particularly limited; and (b) creating implementation supports (tools, documentation, and training materials). For further information regarding career conversations, refer to the "Career Conversation Literature Review (Butterfield, Borgen & Lalande, 2008). This research was part of a larger project conducted by the Canadian Research Working Group on Evidence-Based Practice in Career Development (CRWG) entitled, "Meeting workplace skill needs: The career development contribution" (reference to website). The career conversation intervention is one of three, workplace based career interventions that were developed, implemented and evaluated within Canadian SME's. Each intervention differs in the amount of resources required for implementation with the career conversation representing the middle level of support and resources.

As identified by Magnusson and Lalande (2005), evaluation of the impact of career development services has been generally lacking in the field of career development, thus a goal of the CRWG is to build the evidence base for career development practice. Thus, an additional goal of the Workplace skill needs project was to gather evidence on the impact of career development strategies in the workplace, in this case the impact of the career conversation intervention. To achieve this goal, the research utilized the Evaluation framework for Career Development Interventions (Baudouin, Bezanson, Borgen, Goyer, Hiebert, Lalande, Magnusson, Michaud, Renald, Turcotte, 2007). This project was funded by Human Resources and Social Development Canada Workplace Skills Initiative.

The following report will describe the results of the research followed by a description of the nature of the career conversation intervention and manager training. An overview of the research methodology and data analysis will then be provided. The report will conclude with a discussion of the conclusions and recommendations for implementing career conversations, the value of the career evaluation framework, and implications for future research.

EVALUATION RESULTS

The evaluation results will be provided for the managers and then the employees. The evaluation results related to the managers include: (a) the manager training seminar evaluation, (b) the career conversation fidelity check, (c) a three-month follow-up interview, and (d) a six-month follow-up interview. The evaluation of the career conversation related to the employees include: (a) The Career Maintenance Survey, (b) first interview, and (c) a six-month follow-up interview.

Manager Training Seminar Participants

There were a total of 16 participants in the seminars, including 13 managers in the Calgary location and three in the Vancouver location. The managers (used synonymously with the term supervisor for the remainder of this report) worked for SME's. The inclusion criteria for the managers had no restrictions on age, ethnic heritage, or gender. All participants were required to read, write, and speak English. The managers must have had one or more employees reporting to them. They also must have been willing to commit to the two-day training session (which included completing a brief pre-test, post-test evaluation form). In addition, managers must have been willing to conduct and audio record a career conversation meeting(s) with their employee(s), which could have been up to two hours long. After the career conversations, the managers must have been willing to participate in three interviews scheduled in three-month intervals. The first interview being scheduled within days of conducting their first career conversation. For the remainder of this report, the interviews will be referred to as the managers' first interview, the managers' three-month follow-up interview, and the managers' six-month follow-up interview. The managers' first interview was expected to last approximately 30 minutes, and the last two managers' follow-up interviews were expected to last up to one hour each. In total, the managers were required to commit to approximately three days over the course of six months. The participants represented SME's in a variety of sectors as represented in Table 1.

Table 1: *Manager Training Seminar Participants*

Participant #	Gender	Industry	Location
1	Female	Transportation	Calgary, AB
2	Female	Transportation	Calgary, AB
3	Female	Non-Profit	Calgary, AB
4	Female	Banking	Calgary, AB
5	Female	School Division	Innisfail, AB
6	Female	School Division	Innisfail, AB
7	Female	Non-Profit	Calgary, AB
8	Female	Automobile service industry	Calgary, AB
9	Female	Architecture/Engineering	Edmonton, AB
10	Female	Automobile service industry	Calgary, AB
11	Female	Business Services	Calgary, AB
12	Female	Investment Services	Calgary, AB
13	Male	Retail	Calgary, AB
14	Female	Business Services	Vancouver, BC
15	Female	Business Services	Vancouver, BC
16	Female	Unknown	Vancouver, BC

The participants did not incur any costs to participate in this research study. The managers attended a free-of-charge career conversation training seminar and were reimbursed for travel and parking costs for participating in the research study activities. Through the duration of the research study, 13 managers withdrew from the research study at various times. Ten managers withdrew from the study right after the career conversation training seminar because they were unable to begin the career conversation program in their place of work. Some managers did not have employees interested in participating in the research study, which included the three Vancouver managers. One manager withdrew after the managers' first interview due to a number of difficulties incurred from trying to implement the career conversation program in their workplace. However, this manager was willing to provide data for the managers' six-month follow-up interview at the time of his or her withdrawal. Two managers withdrew from the study after the managers' three-month follow-up interview and indicated they were not interested in completing the managers' six-month follow-up interview. However, they

were willing to provide data related to the managers' six-month follow-up interview at the time of their withdrawal as well as complete the *cross-checking by participants* credibility check (Butterfield et al., 2009).

Manager Training Seminar Evaluation Results

All the participants rated the seminar as being useful (average rating was 3.33 out of 4). They also all rated the workshop facilitation as being acceptable (average rating was 3.47 out of 4). The workshop facilities were not rated as high (one unacceptable response; average rating was 2.87 out of 4), which was most likely due to unexpected noises from an adjacent room that were distracting.

Knowledge about career conversation. The self-ratings of the participants' levels of knowledge increased after completing the career conversation training seminar. On the 4 point rating scale (from unacceptable to exceptional) the average rating changed from before the workshop to after the workshop: (a) by an 1.35 point improvement in their understanding career conversation aims and objectives (Figure 1); (b) by an 1.22 point improvement in their knowledge regarding potential challenges to implementing career conversations (Figure 2); (c) by an 1.43 point improvement in their knowledge about personal assets and the resources to access for engaging in career conversations (Figure 3); (d) by an 1.36 point improvement in their understanding how to conduct career conversations (Figure 4); and (e) by an 1.22 improvement in being able to develop an action plan to address challenges in conducting effective career conversations (Figure 5).

Figure 1: Mean Pre- and Post- Training Ratings – Understanding Aims and Objectives

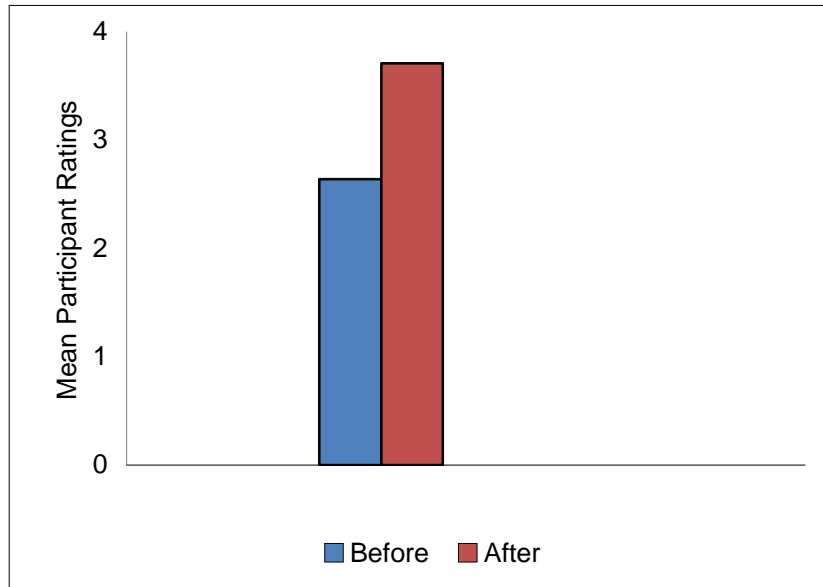


Figure 2: Mean Pre- and Post- Training Ratings – Knowledge Regarding Challenges

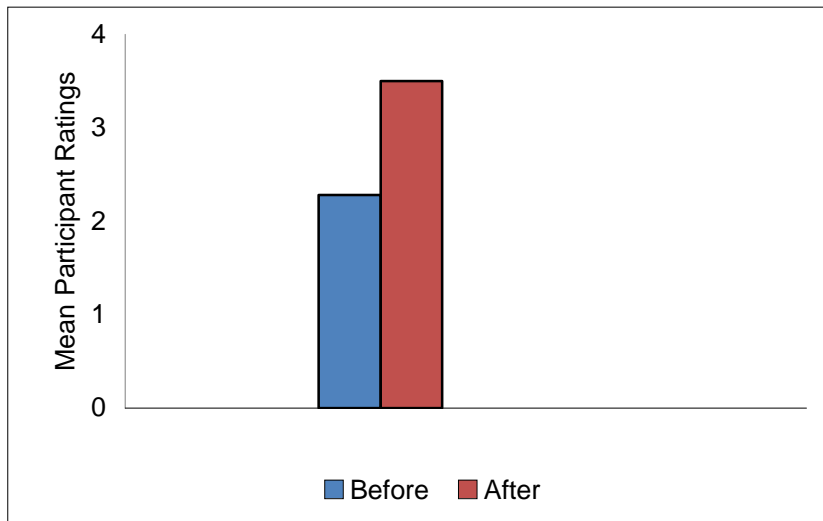


Figure 3: *Mean Pre- and Post- Training Ratings – Personal Assets and Resources to Access*

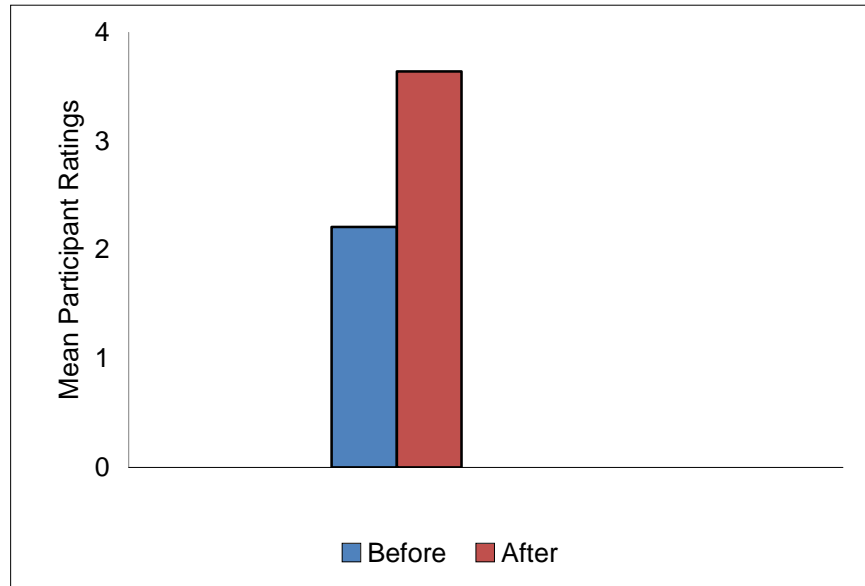


Figure 4: *Mean Pre- and Post- Training Ratings – Understanding How to Conduct Career Conversations*

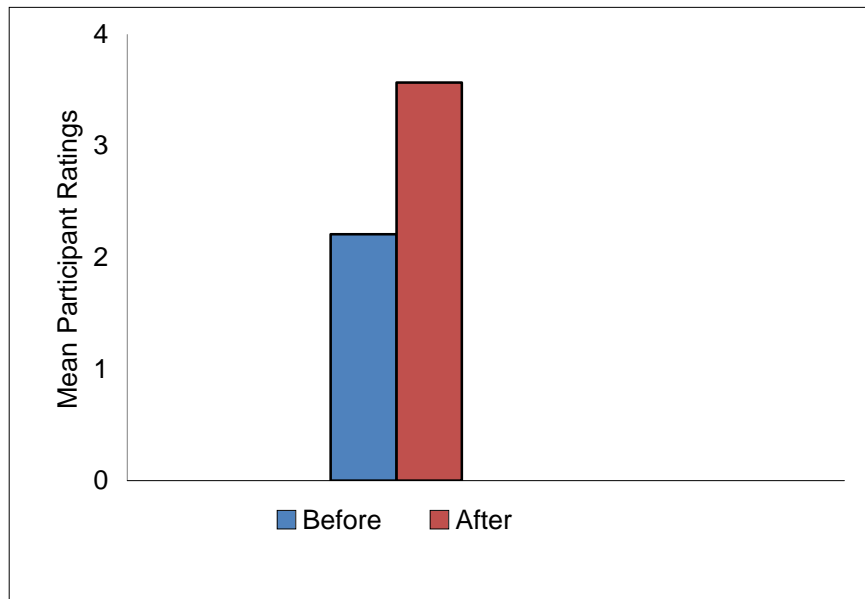
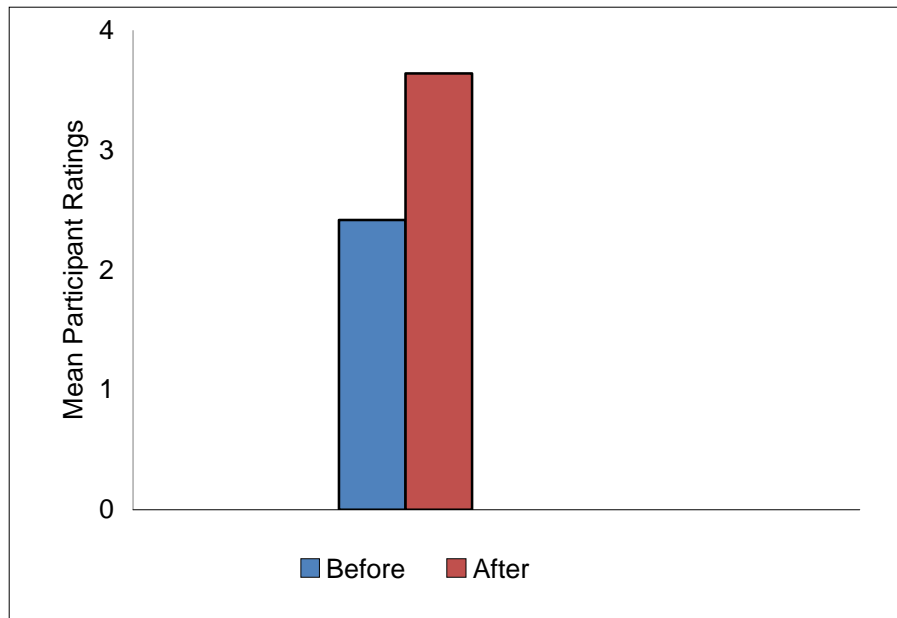


Figure 5: *Mean Pre- and Post- Training Ratings – Developed Action Plans to Address Challenges.*



Before the training, there were 20 ratings in the unacceptable range about the participants’ knowledge of career conversations. After the training, all participants rated their knowledge about career conversations as “acceptable” and all but two participant ratings rated their knowledge as being higher than “minimally acceptable” after the workshop.

First day of seminar feedback. Fourteen Calgary participants provided written feedback about their experiences on the first day of the workshop. On a scale from 0 to 10, participants, on average, rated the workshop an 8 out of 10. Moreover, when asked to name an aspect of the training that was important to them on this first day, analysis of responses revealed three themes. They identified that the group format was important as indicated in the following quotations.

“Listen to different experiences of the participants”

“How we can handle new situations”

“Discussion of personal challenges of others and understanding how universal they can be”

They also thought it was important to learn about career conversations, as indicated in the following quotations.

“Found it useful to go over the different steps of an interview”

“Good to help develop how one should go about aiding employees in defining their career path”

“I got to learn a better way of having a career with an employee”.

The last important experience identified in the first day was having the opportunity to practice, as noted in the following quotations:

“Practicing interview with interview questions

“Opportunities to practice communication skills”

Best three workshop features. The participants were asked what they perceived as the best three features of the workshop resulting in a total of 38 responses. The analysis of these responses suggest that they liked the seminar topics and also liked the diversity of seminar experiences. The particular topics they liked included the length of the seminar; the types of questions to ask; action planning; and learning the importance of having these conversations. Examples of the diverse seminar experiences they liked included the small group work; group discussions; and practical experience by practicing conducting career conversations.

The participants’ responses also highlighted the importance of being involved in the group training format as part of the seminar. Eighteen comments pointed to the usefulness of having a group format, appreciating interacting with other participants, and liking the group climate. The following quotations illustrate the importance of the group training format to the participants.

“Meeting with people looking for the same outcome”

“What I learned from the various feedback and personal stories”

“Networking opportunities”

“People from different industries”

“Variety of attendees”

“Intimate setting”

“Very relaxed atmosphere”

“All experiences were valued”

Less relevant workshop features. Participants provided only seven responses to the question, “what were the 3 features of this workshop that were less relevant for you?”

Analysis of responses revealed that some participants did find the high level of interaction and some would have preferred more emphasis on communication strategies and less emphasis on the value of career conversations. The low response rate and the difference between these responses and the responses to the first question, suggest that these comments may represent individual preferences. However, for these participants, there were certain aspects of the seminar they would have liked to learn more about or focus less on as they already had a certain level of understanding.

General feedback at the end of the seminar. The positive comments given at the end of the seminar included:

“Thoughtful delivery of material”

“Rekindling the importance and need for career conversations”

“Appreciation of material presented as a “framework””

There were some suggestions about how to improve the seminar, as follows.

“Send out questionnaire to participants prior to workshop – assess concerns and knowledge, then see if seminar met expectations“

“Read in advance about the topic”

Career Conversation Fidelity Check Results

Analysis of the six recorded career conversations indicated that managers were using the career conversation format and skills that were taught during the training seminar and outlined in the “Orientation to career conversations – Manager Guide” (Borgen, Lalande & Butterfield, 2009). The format was outlined in the handout “The Career Conversation Checklist” which was taught to be a flexible, non linear process that can be adapted to the managers’ workplaces. The results indicate that the employer’s initiated their discussions based on the employee’s needs and moved through the format and checklist in a fluid manner, with the various skills being used at different times throughout the career conversation. They utilized a variety of skills, each corresponding to the three phases of the career conversation: expanding exploration, providing another perspective, and planning action (table 2 and table 3).

Table 2: *Skills Demonstrated in Career Conversations*

Skills For Career Conversation	Number of Employers Using Skill
Active Listening	6
Paraphrasing	6
Primary Empathy	4
Open Questioning	6
Clarifying	6
Summarizing	5
Information Giving	6
Strength Challenge	3
Self-Disclosure	5
Supporting (offering encouragement and reinforcement for employee's efforts; Validating how someone feels/felt)	5
Willingness to Offer Support/assistance	5
Complimenting on Strengths	
Seeking Employee Input	2
Openness to Suggestions	3
Inquiring about What Employee has Already Tried	2
Advanced Empathy	1
Immediacy	1
Goal-setting/Contracting	5
N = 6	

Table 3: *Phases of Career Conversations and Number of Employers Who Guided Employees Through Each Phase*

Phase 1 of Career Conversation: Expanding Exploration	Number of Employers Guiding Employee's through Phase
General Opening Interaction	
Examples of what was done:	
<ul style="list-style-type: none"> • Thanking employee for participating; Introduced what they would be doing; and Explaining what will be expected of employee 	3
Clarifying Purpose of Conversation	4
Reviewing and Identifying any relevant challenges on Employee Positioning System (EPS)	5
Challenges: Not knowing where to begin	1
Not knowing what options are available in organization	1
Not knowing if he or she has skills or attributes	1
Not knowing if he or she has support needed	3
Not knowing how to make this happen	2
Identifying and Exploring additional Challenges not listed on EPS	
<ul style="list-style-type: none"> • Examples: Asking in general about blocks/challenges; discussing lack of experience, and lack of work. 	3
N = 6	

In addition to the skills outlined on the “The Career Conversation Checklist” (Borgen, Lalande, & Butterfield, 2009), managers utilized a number of additional skills during their recorded career conversations. Examples of these skills include: (a) the demonstration of a willingness to offer support/assistance to the employee; (b) an openness to suggestions from employees; (c) seeking employee input about particular challenges and ways to improve the functioning of the organization; (d) inquiring about what the employee had already tried, for example in dealing with challenges; (d) offering encouragement; and (e) complimenting the employees about their strengths.

Managers’ First Interview

After the managers conducted an actual career conversation with the employers six participated in an interview that was conducted three months after each had conducted a career conversation, to discover what they had learned and liked about the seminar. They were also asked for suggestions for improvement to the seminar and about the challenges related to conducting career conversations. The data analysis revealed a total of 201 themes that were identified from the interviews that are described as follows.

The results indicate that there were many aspects (36 themes in this category) of the training seminar that they liked (see table 4). They mentioned they liked the design of the seminar including the length, materials, activities, and the style and skills used by the facilitator. They thought that the material was clearly presented and the information conveyed was useful. They liked the diversity of the participants in the group and the different perspectives and ideas that were shared. They also thought the group discussion was good for generating ideas, having interaction and providing feedback to each other.

Table 4: What Managers Liked About the Training Seminar

Themes	Frequency Rates	Participation Rates
Design of the training seminar	28%	83%
Clarity of information presented	19%	50%
Group discussion	19%	50%
The information	17%	83%
Group diversity	17%	33%

There were a few suggestions (17 themes identified) for improvements to the seminar (see table 5). Some mentioned that they would have liked more opportunity for discussion and also suggested the addition of more topics such as how to handle the different directions that career conversations can take and discuss other topics that may arise. Some thought that the design of the training seminar could be improved such as the length of the breaks, the way the examples were worded, and how activities were introduced.

Table 5: Managers' Suggestions for Training Seminar Improvements

Themes	Frequency Rates	Participation Rates
More discussion	41%	17%
Changes to training seminar design	24%	33%
Add more training topics	18%	17%

Everyone agreed that the seminar enhanced their understanding of the aims and objectives of a career conversation. They listed a number of career conversation objectives (48 themes identified) that aligned with what was taught at the training (see table 6). They also agreed that the seminar helped them identify the challenges to implementing career conversations and were able to list a variety of challenges (29 themes identified) that were addressed in the seminar (see table 7).

Table 6: *Aims and Objectives of Career Conversations*

Themes	Frequency Rates	Participation Rates
Support employees career development	21%	67%
Understand employees' career/life goals and interests	21%	83%
Evaluate employees' current job experience	17%	50%
Support employees' work performance and abilities	15%	50%
Identify and maintain the employees' level of job satisfaction	8%	50%
Recognize opportunities for the organization	4%	33%
Support the efforts of the managers' role and responsibilities	4%	33%
Identify and address career conversation challenges	4%	33%
Identify ways to retain employees	4%	17%
Recognize what employees want from the career conversation	2%	17%

Table 7: *Managers' Perceived Potential Challenges to Implementing Career Conversations*

Themes	Frequency Rates	Participation Rates
Obtaining support and interest from others	21%	50%
Time and priorities	21%	50%
Lack of employees readiness or interest	17%	33%
Coordinate the roles and career conversation process	10%	33%
Limited number of available positions	10%	33%
Employees' questions/ideas	7%	33%
Managers' level of career conversations skills	7%	17%

The responses indicate that the seminar helped them review their personal assets and resources to conduct career conversations and they were able to identify the assets explored during the training session (18 themes identified). All the managers agreed that the seminar enhanced their understanding and abilities to conduct career conversations including (a) learning different ways to ask questions, (b) practice active listening, (c) how to guide the conversation, (d) different and new ways to communicate, (e) using empathy, (f) the resources they had to conduct career conversations, (g) being reminded of the skills they already have, and (h) an ability to understand their employees (see table 8).

Table 8: *Managers' Perceived Personal Assets for Conducting Career Conversations*

Themes	Frequency Rates	Participation Rates
Ability to listen	22%	50%
Ability to ask questions	22%	33%
Sharing ideas and resources	17%	33%
Interest in helping others	11%	33%
Goal planning	6%	17%
Resources to conduct career conversations	6%	17%
Reminder of skills	6%	17%
Ability to understand	6%	17%
No comment	6%	17%

All but two managers, who did not respond, said they developed action plans for addressing challenges in conducting effective career conversations in their places of work (9 themes identified). The action plans included (a) checking for interest by discussing how to conduct career conversations with upper management at work, (b) incorporating the information and resources from the seminar into the workplace, and (c) improving their conversation skills.

Managers' Three-Month Follow-Up Interview

Three months after the managers conducted a career conversation with an employee they were interviewed again. Five managers were interviewed about (a) what they found helpful and not helpful when conducting career conversations, and (b) if they identified anything that would have been helpful but was not available (wishes) when conducting a career conversation.

The results included a total of 28 critical incidents. There were 21 incidents (identified by five participants) that were helpful, three not helpful incidents (identified by two participants) and four wishes (identified by three participants).

The incidents that were found to be helpful referred to aspects that helped the employers to conduct the career conversations. The training seminar was identified as being helpful in that it provided learning and the ability to implement what was learned. During the training it was mentioned that both seeing examples and participating in role-plays contributed to being able to apply what was learned. Having discussions in a large group reflected different perspectives and more information. It was not helpful to have group participants use cell phones in the training session and someone wished that they were provided with video clips of sample career conversations for future reference.

The employee workbook and the managers' guide were cited as being helpful for preparing for, and conducting career conversations. One comment was made about the employee workbook as being too much paperwork for some employees. Having it available on-line was suggested as being more user friendly.

Other helpful incidents included (a) the use of reflective listening during the conversation, (b) ongoing support from the research investigators was encouraging, (c) having previous experience with career conversations reinforced the perception that this intervention was important, (d) recording the conversation facilitated reflection and allowed for making improvements in future conversations, (e) having mini-conversations with the employees prior to the longer career conversation informed the choice of topics, and (f) clarifying the role of the manager and what they can offer as support for the employee's career.

Incidents that were not helpful included one comment about finding the conversation as being too long. This was due to the employee raising topics unrelated to the career conversation objectives. The other hindering incidents are described above, but include the amount of employee paper work and the use of the cell phone during the two-day seminar.

The wishes they identified included the desire to have more control over their environment or company providing them with more power. They also wanted to be able to better shift the employee's attention towards the career path that complimented the organization and met the manager's expectations. As mentioned above, there was also a desire to have video clips to exemplify parts of a career conversation.

Managers' Six-Month Follow-Up Interview

Three managers participated in interviews that occurred six months after their initial career conversation with an employee. They reported that they all continued to have career conversations, and had conducted, on average, four career conversations since the training session. They expressed an interest in continuing to explore and understand the employees past experiences, current skill-set, strengths, weaknesses, goals, and interests in the organization. When asked if there were any modifications that they would make to the career conversation process, one manager indicated that he or she did not want to modify the conversations. The other two managers suggested that they would want to guide and direct the conversation more as well as focus on employee skills to identify goals. They also wanted to focus on how they could align the employee and organization needs. In terms of the process, they thought it would be helpful to schedule regular career conversations and try different ways to structure the conversations, such as having the employee prepare starting topics.

The managers shared that the career conversations made an impact on their role and ability to get more involved within work-related situations and influence others. Comments included statements about reinforcing and expanding the manager's roles, responsibilities, and capacities, such as becoming a liaison, a resource to employees, suggesting insightful opportunities to employees within the organization, and passing on employee feedback to other supervisory staff. Some remarked on their ability to influence the career development of their employees and stimulate the self-evaluation of other supervisory staff about their own managerial approach. One manager shared that career conversations provided a positive opportunity for the employees to express their emotions and issues that would not otherwise be addressed.

Another impact reported was to the relationship between the manager and employee. Statements involved comments on rapport, trust, confiding, and employees seeing the manager as an ally. They also noted that the employee's career development and workplace performance were affected. Examples of this include: employees making more of an effort in the workplace, taking a course, following up with the manager's requests, and completing the steps laid out in the employees' career conversation workbook.

An increase was reported in both the managers' and employees' awareness about career opportunities and work attitude. The manager's recognized more about the employees' current work role, discovered "hidden talents", and that the employee's workbook portfolio was useful. The employees attitudes about their work and tasks also changed, in that they learned how to challenge themselves with tasks and recognize how their responsibilities were helping them achieve their desired goals.

One manager discussed how challenges arose within the workplace when trying to follow through with the plans discussed in the career conversation. More specifically, there was an unexpected discrepancy between the employee's skill levels and the organization's training program qualifications. This resulted in the need to rectify this issue.

Feedback was collected from the managers who participated in the career conversation training seminar but did not conduct a career conversation and/or withdrew from participating in the evaluation research. It was thought that this feedback might provide information that could be utilized in revising the training seminar or future research. The feedback was reviewed and summarized in the following themes.

The primary reason expressed that the managers for not conducting a career conversation following the training was that there were workplace challenges to implementing this new procedure. Budget cuts, the lack of an advancement program, and lack of support were some of the challenges identified. The reality of using career conversations at work was also questioned, in terms of how it would fit in a work schedule. The following quotations represent some of the frustration experienced in trying to implement career conversations in a workplace.

"Well I did experience that we have huge roadblocks here in regards to trying to implement something like that".

"I was very pumped about doing career conversations and then you get back to your place of work and there's just nowhere to take them".

Summary of Manager Training Evaluation Results

Although it is difficult to generalize from the evaluation results due to the small sample size, the feedback indicated that the manager training achieved the objectives and the impact of the training seminar persisted over six months.

The managers reported that the training increased their (a) understanding of the aims, objectives and how to conduct career conversations, (b) overcoming challenges to implementing career conversations, (c) their personal assets and resources for conducting career conversations, and (d) how to develop action plans to overcome challenges to conducting career conversations. The feedback about the seminar was primarily positive. They indicated that they liked the seminar topics, the diversity of seminar experiences, and the group training format. These results were maintained in the first and second follow-up interviews with managers, indicating that the knowledge and skills taught in the manager training seminar persisted.

The results from the analysis of the audio recordings of the managers' career conversations with their employees suggest that the managers utilized the communication skills that were taught in the seminar. They also followed the career conversation format that was reviewed in the seminar.

The evaluation of the manager training seminar was overwhelmingly positive, but there were a few suggestions and concerns. Although these results may reflect the individual needs and context of the training seminar, it could be revised accordingly and further evaluated in the future.

The evaluation results indicate that the training seminar could have put more emphasis upon how to overcome the challenges of implementing the career conversation intervention in the workplace. A review of possible strategies for garnering this support could have been helpful to include during the training seminar. However, all the manager training participants did not have the support of their organizations for implementing career conversations in the workplace prior to the training. Addressing this issue may not be as important if the managers who receive the training already have the support of their senior management. In addition, the economic context dramatically changed during the project, resulting in downsizing and layoffs in many organizations. The difficulties in implementing career conversations within SME's may reflect changing priorities within this context.

Another improvement to the training seminar could also include focused discussion regarding adapting the career conversation to particular employee needs and how to utilize the employee workbook to support this process. Strategies could also be

reviewed for increasing the options for employee career goals (other than advancement) within an organization. This may be useful in SME's where limited opportunities for advancement exist.

Six months after the initial career conversation, there is evidence to suggest that career conversations had positive impacts on the managers and employees. Managers reported wanting to continue career conversations and were interested in improving how to conduct conversations. They believed that career conversations had a positive influence on their roles as managers and improved their relationships with employees. They reported beneficial impacts upon the employee's career development and workplace performance, such as making more of an effort in the workplace, taking a course, and following up with the manager's requests. Career conversations increased their awareness of discrepancies between employee skill levels and the organization training program qualifications resulting in the need to rectify this issue.

Employee Results

Employee Career Conversation Participants

The employees recruited were screened to meet a number of inclusion criteria for the research study. Their manager must have been participating in the research study. They must have been willing to review and complete a career conversation workbook that took up to two hours. After participating in a career conversation with their manager, the employees must have been willing to complete two interviews (up to one hour each). For the remainder of this report, the employees' interviews will be referred to as the employees' first interview and the employees' six-month follow-up interview. The employees' first interview was scheduled to occur days after their career conversation. The employees were given a \$50 honorarium in the employees' first interview and reimbursed for any travel and parking costs for participating in the study's activities. In total, the employees were requested to commit to approximately 7.5 hours over a course of six months.

The final research sample consisted of eight employees (two men and six women), all of who were born in Canada. Participants' age ranged from 20 to 42 (mean age = 27.4; SD = 8.50). Participant's annual household income ranged from \$12,000 to

\$150,000 (mean = \$94,625). All participants reported participating in a form of post-secondary education: one identified some university; one identified college and some university; two identified some college; one identified college; and three identified completing university or Bachelor's degrees. The occupations of the participants are organized by their affiliation to particular National Occupational Classification (NOC) codes. The NOC occupational codes of the participant occupations were: code 1411 General Office Clerks (three employees); code 4212 Community and Social Service Workers (one employee); code 0112 Human Resources Managers (one employee); code 1212 Supervisors, Finance, and Insurance Clerks (one employee); code 0611 Sales, Marketing and Advertising Managers (one employee); and code 5227 Support Occupations in Motion Pictures, Broadcasting and the Performing Arts (one employee). Table 9 summarizes the participants' demographic information.

Table 9: *Employees' Demographic Information*

Participant	Gender	Age	Marital Status	Education	Industry	Time in Industry
1	Male	20	Single	Some University	Arts and Cultural Festival	Under 6 months
2	Female	22	Single	Bachelors Degree	Festival Industry	Under 6 months
3	Female	21	Single	Some College	Non-Profit	Under 6 months
4	Male	38	Divorced	University Degree	Members Services	7 years
5	Female	28	Married	College and Some University	Banking	5 years
6	Female	42	Married	College	School Division	20 years
7	Female	28	Married	Bachelors Degree	Administration	7 years
8	Female	20	Single	College	Tourism	Under 6 months

Employees' First Interview

After the employees had participated in a career conversation, they were asked a number of questions in an in-person interview to understand their perspectives on the experience of participating in a career conversation at their place of work. Specifically, the questions gathered data relating to what helps and hinders career conversations according to employees. This data was analyzed to discover the critical incidents that represent what helped and hindered career conversations as well as identify some wish list items for future career conversations. The results of this interpretation were then reviewed (credibility check) with each of the employees to ensure that their feedback was represented.

The first interviews and credibility check yielded a total of 80 helping and hindering critical incidents and wish list items, broken down as follows: 59 helping critical incidents (74%), 9 hindering critical incidents (11%), and 12 wish list items (15%). During the data analysis, 19 potential critical incidents were flagged for follow-up with participants during the second, cross checking interview (six-month follow-up interview). These were items that appeared to be critical incidents, but were missing information such as supporting importance and outcome details. During the six-month

follow-up interview, the employees confirmed 16 of these items as critical incidents and provided additional details. This information was summarized in categories as part of the final results.

As described in the methodology section, critical incidents were grouped together into categories based on data from the study. Participation rates for each category were calculated by dividing the number of participants who mentioned items fitting into a particular category by the total number of participants ($N = 8$). As described by Butterfield et al. (2009), a participation rate of 25% is needed for a category to be considered viable. All 12 categories met the 25% participation rate test under one or more of the helping, hindering, or wish list headings. Table 10 (a) summarizes the categories, (b) indicates the total number of coded incidents in each category, (c) the number of helping and hindering incidents and wish list items identified in each category, and (d) the number of participants who mentioned one of these incidents (participation rate).

Following table 10, each of the categories will be described with regard to the incidents in the career conversations that the employees found helpful and hindering. Their wishes for improving the career conversation identified in each category will also be described.

Table 10: *Categories, Critical Incidents and Wish List Categories*

#	Category	Helping Critical Incidents (N = 73)			Hindering Critical Incidents (N = 11)			Wish List Items (N = 13)		
		Participants (N = 8)		Incidents <i>n</i>	Participants (N = 8)		Incidents <i>n</i>	Participants (N = 8)		Incidents <i>n</i>
		<i>n</i>	%		<i>n</i>	%		<i>n</i>	%	
1	Initiating and Assisting Communication	5	63	10	1	13	1	1	13	1
2	Discussing Work, Goals, and Future	5	63	7	0	0	0	1	13	2
3	Open and Genuine Interpersonal Interaction	5	63	12	0	0	0	0	0	0
4	Employer's Qualities and Approach	5	63	10	0	0	0	1	13	1
5	Preparing for the Conversation	4	50	6	3	38	4	2	25	2
6	Sharing Experiences and Learning	4	50	6	0	0	0	1	13	1
7	Distractions and Restrictions	0	0	0	4	50	5	1	13	1
8	Encouraging Employees Towards Goals and Development	3	38	6	0	0	0	2	25	2
9	Resources and Tools	3	38	4	0	0	0	2	25	2
10	More Conversation and Follow up	3	38	3	0	0	0	1	13	2
11	Timing and Location of Conversation	3	38	4	0	0	0	0	0	0
12	Discussing Challenges	3	38	5	0	0	0	0	0	0

Categories of Helping and Hindering Incidents and Wish List Items

Category 1: Initiating and assisting communication. This category refers to incidents related to how the career conversations were conducted that employees found helpful or hindering. The helping incidents refer to the participants' descriptions about how the employer helped the conversation develop and move forward by using facilitation skills and questions. Examples of these incidents include (a) feeding the dialogue along, (b) pulling out ideas, and (c) letting me know other people felt the same. The following quotation provides an example of how the manager helped to pull out ideas during the conversation.

“I think, especially with me sometimes, I have so many thoughts or so many things going on in my head, as I start saying it, she will kind of start pulling out ideas of what I am trying to say and then it is easier for me to say yes, then kind of develop that idea” (Participant 2).

The participants also identified particular types of questions asked by the manager that were helpful to the conversation, for example asking about their expectations of the human resource department and the fairness of promotional opportunities. Some of the helpful questions were identified as being straightforward and the sequencing of questions was also helpful.

The employees identified some positive outcomes occurring as a result of the managers' facilitation skills and questions. They were able to understand the questions and easily relate them back to their jobs. It also assisted them in helping other people more. In addition, they were able to find out where their frustrations were coming from and generate thoughts on particular topics.

The hindering incidents referred to what was lacking or interfering in the facilitation and development of the career conversation. The single hindering item within this category was that some questions were broader and more open-ended than what the participant would have liked. The outcomes of having these types of broad questions were not knowing what to take and apply to what the employee was doing, not moving forward, and feeling scattered. The following quote describes these outcomes further.

“It was hard for me to, how do I explain it...it's hard for me to move forward I think I did not really move forward because I did not really have anything to base

it on. I felt scattered again. It being opened ended, I felt open ended. I did not know what to take and apply it to what I am doing” (Participant 2).

The wish list item in this category referred to the other kinds of questions and topics that the employees identified as facilitating more discussion. The single wish list item identified by participants was to have more questions related to office morale. It was mentioned that these types of questions would have allowed the employee to reflect on what he or she could do to contribute to the office morale and realizing what other people are doing. The following participant quote illustrates these potential outcomes further.

“I think if we just had people reflect more on, on how they see things and how they, you know, like deal with things with other people. If, if you can talk about something and, and reflect on it, like a career conversation is, you know, you’re reflecting on your goals and everything, well you’re reflecting on your morale and what you’d give to the office and what you’d give to the other people that you work with, that you can go back and kind of really reflect on it and know, okay, what can I do better, like what do I do for office morale? I don’t do anything, you know” (Participant 7).

Category 2: Discussing work, goals, and future. This category included helpful topics in the conversation about what the employees currently did for work, their career goals, and career future. There was also one wish list item from an employee who would have liked to have more talk about the topic of his or her future career. Specific examples of the kinds of helpful topics include (a) career goals and aspirations, (b) what the employee wanted or did not want in his or her career, (c) how the employee did things and what things he or she liked to do, (d) information about qualities unknown to the employee, and (e) the future career or what is next.

The positive outcomes of speaking about the employee’s current work, goals, and future were expressed as helping him or her to be much more aware of what is wanted and understanding the need to do more than he or she is currently doing. They also said that it allowed them to start to make changes to what is not being met and how they could apply what they have been doing to other work. The impact of the focus of the conversation on work and career goals is illustrated in the following quotation.

“Like it got me thinking about, you know, reflecting back on what I said and what my career goals are and, and how, you know, there are some things that aren’t, goals that aren’t being met, how can I change that or, it, it just, it just kind of made you really reflect on what you do and, and where you want to be. And the end where the organization could take you as a whole, right, so there’s not a lot of room to grow so where, you know, what, what can you do for yourself to make you feel like you’re growing...” (Participant 7).

Employees would have liked more talk about what they wanted to do in the future and more feedback and advice about their current work.

Category 3: Open and genuine interpersonal interaction. This category included incidents that constituted the conditions enabling a positive interpersonal climate between the employee and employer during career conversations. Employees experienced these conditions as helpful. No hindering incidents or wish list items were identified in this category.

The positive interpersonal climate was reported as being facilitated by having an open dialogue, the experience of feeling comfortable, having a realistic, two-way conversation, and one with a good flow. Another helpful incident was having the manager understand the employee as a person. The positive impacts of this climate on employees was described as feeling comfortable, “de-stressing”, speaking openly and freely, no ulterior motives, and not worrying about what was said or having something said come back after with repercussions. This is elaborated upon in the following quotation.

“I can speak freely instead of having a question asked and then having a specific response. Then I can elaborate on my ideas and that kind of thing. It definitely just feels more natural...instead of we are going to have a CC, watch what you say because if you say something wrong I am going to fire you” (Participant 1).

Category 4: Employer’s qualities and approach. This category refers to the personal qualities of the managers as well as their approach to management that facilitated the career conversation. It was helpful to have the manager as being the person with whom there was a career conversation, because the manager worked in the office

that contributed to his or her understanding. Having the conversation with a stranger, who does not understand the employees' work environment would not have been as helpful.

This points to the benefits of the manager having insider information that can help because (a) he or she knew office people who were challenging, (b) it increased the level of understanding, (c) the conversation was more realistic, and (d) more time could be spent finding the path to the goal rather than giving background information. When the direct supervisor was not the person who conducted the career conversation, the employees wished that it could have been this person to provide more of the kinds of benefits listed above.

The personal interaction between employees and employers was also enhanced by managers who were perceived as being open, approachable, personable, helpful, and having a type of "new school" management. These qualities resulted in the ability to trust the manager and being able to talk about anything, as indicated in the following quotation.

"So by her being approachable, I found it really easy to let go and really be very open with how I am feeling and with the frustration and kind of work towards a solution. And my result from that ended up being I left a little bit more relieved because I found I could take something from that conversation and start applying that to my work" (Participant 2)

Category 5: Preparing for the conversation. This category referred to what happened to either help or not help the manager and the employee prepare for the conversation. It was helpful to know ahead the purpose of the conversation and that information shared would be confidential. One employee reported that it was helpful to have the personal expectation that nothing would happen overnight after the conversation as indicated in the following quotation.

"You know I think you have to have reasonable expectations going into it. I don't expect that my world, and career, and life is going to change tomorrow.

Obviously the problems that I am perceiving with my own position or my own job are my perception and I do know that. You know you have to do certain things to try and rectify those. And also it is an important step to recognize maybe when you are in a spot that you know, this is kind of not where you want to be right... I

was not expecting something to happen over-night. It sort of re-affirmed my commitment to maybe to my long term goals” (Participant 5).

Some employees found it unhelpful not knowing what to expect and they were not adequately prepared before the conversation. Examples of hindering incidents were not understanding what the career conversation was and what the reasons were for doing it, and not knowing what would be told or what would be kept confidential. This was reported as contributing to having moments when no one spoke, not knowing what to do, and holding back a little. Employees wanted the managers to have more understanding of their backgrounds, such as what they had taken in school, so the conversation would be more focused and helpful. This category implies that the manager did not review the employees’ history or offer the employees the Career Conversation Employee Workbook prior to the conversations.

Category 6: Sharing experiences and learning. This category refers to how it helped to have the manager, who was in a mentor type of position, share their own experiences and challenges during the conversation. The employees reported learning from this sharing resulting in becoming more open-minded and seeing challenges from a different side. It helped to have someone who had a similar career path understand what the employee was experiencing. The hindering and wish list items indicated that they wanted to hear and understand more about the manager’s experiences.

Category 7: Distractions and restrictions. This category includes incidents that did not help the career conversation, including distractions that interfered with the employees’ ability to focus or become fully engaged. The kinds of distractions include interruptions during the conversation; having a lot going on in the location where the conversation took place; asking the employee about all of his or her goals in one question; and becoming emotional. The following employee describes how this affected him or her.

“I guess I could not finish my thoughts and I could not fully get everything off my chest, I guess you could say. Because you get stopped and you have to kind of think, “Okay what was I trying to say?” So it takes away from the actual meeting” (Participant 2).

One employee also found it unhelpful to have only a limited time for the conversation.

Category 8: Encouraging employees towards goals and development. This category referred to helpful incidents during the conversation including the various ways their employers empowered them to keep working towards their career goals and ways they can continue to develop. They identified some wish list items in this category but did not mention any hindering incidents that decreased their motivation.

Helpful incidents in the career conversation included how the managers encouraged employees to take their own steps toward goals and offering what employees experienced as a belief in the employee's abilities. Examples of these incidents included: reassurance, reinforcement, coaching, pointing out that the employee is the one to make this happen, and focusing on the benefits to be personally gained from their work.

The employees also identified two wish list items that referred to what else they would have found empowering and helpful in the career conversation in terms of finding ways to take steps towards their career goals and desired improvements. One employee wished that he or she could have had questions to get on the right path and another wanted suggestions as to what could be done differently in the job. Positive outcomes from these wishes were identified as having a better understanding of the starting point for their goals and getting information to step off to a longer term plan. This information would also provide the employee with how to try other ways to do his or her job. The following participant's comments help illustrate a few of these positive incidents and outcomes.

“Coaching forces you as the participant to think about things maybe in a way that you would not have before under the direction of another influence. So rather than that person saying well I think you should do this, this, this and this, it was well what other things have you thought about? You know, but...why did you like that, why did you not like that? Did you know of any other in...so in the sense that it leads you to examine your situation or your specific challenge or barrier that you know you are facing in your career it, you know rather than getting the input of five different people when you have a problem, you talk to five people and they give you five different sets of advice. You are forced to do that for yourself because ultimately the decisions, you know lie within you. And you are

going to feel more strongly about a decision that you come to yourself.

Sometimes you just need somebody to facilitate that for you” (Participant 5).

Category 9: Resources and tools. This category included the resources and tools that were included as part of the conversation that they considered as being helpful to furthering their career development. The range of resources and tools were quite diverse and included items, such as a personality test, self-evaluation tools; a career survey; and the exercises in the employee workbook. They described these resources as helping them increase self knowledge, to look inwards, to see how things change, to identify skills and attributes, and re-iterating lasting impact of conversation. Participant quotes illustrate a few of these outcomes:

“I think it helped reiterate the lasting impact of the conversation. Because I mean the conversation itself I don’t recall the details of it. I mean what I obviously recall is how helpful it was the positive aspects of it, the changes I have been able to kind of make in my life. Which have not really been significant. I mean just being able to set the goal and go with it. The workbook has sort of refreshed it or validated it, to kind of to help you move in that direction” (Participant 5).

Employees wanted more resources, such as information specific to their occupation and potential career paths. This type of information would help them find a career path and the types of jobs resulting from more training and education. Comments from a participant illustrate a few of these outcomes.

“It would be nice, if she could have been well, like here is your map, what are you good at? What do you think you want to do? Then we could have gone through and been like maybe you want to do more marketing or media or you want to do this and here is a possible or example of a job...Okay if you pick this path then this could be what you will be doing. Then I could be like I don’t want to do that at all or well, that sounds like me. That would be helpful, just to see all of your options” (Participant 3).

This kind of career and occupational information is not easily available in SME’s that do not have job and competency descriptions but is available from community career services.

Category 10: More conversation and follow-up. Employees reported that it was helpful to more than one career conversation along with a continued relationship with the manager. This provided a sense of relief that there was someone available to talk to and answer questions.

The wish list items reinforced that further conversations and follow up with employers would be helpful. They wanted career conversations more often or having a two-part interview, with time in between both interviews. Ongoing conversations were seen as providing more motivation, being able to staying on track to achieving goals, while raising the importance of goals.

Category 11: Timing and location of conversation. This category consists of helpful incidents that refer to certain features of the set up of the career conversation, such as the timing and location of the conversation. No hindering incidents or wish list items were mentioned in this category. They found it helpful to do the conversation on company time and at work. The timing of the conversation was also good for the employee in his or her life. The setting and timing of the conversations was reported as contributing to an increased willingness to participate, better accessibility, and the perception that the conversation resulted in good learning, along with the creation of positive goals. The importance of where and when the career conversation occurs is illustrated in the following quotation.

“..It sort of like a perk for the employee, then the employee can talk about themselves and where they want to be in the company and still get paid for it. It is sort of like having a paid lunch or a paid break that it makes you feel like the organization cares about you and your career goals” (Participant 1).

Category 12: Discussing challenges. The employees generally found it helpful to discuss challenges, frustrations, and stresses experienced in their work and in their workplace, and allow emotions to be a part of the career conversation. Including these disclosures were described as providing stress relief, the ability to be more open, and give more detail about problems. The following participant comments illustrate a few of these outcomes:

“...Just kind of getting my, my beefs out. You know, I think someone like myself going through an experience that I did, there’s not, there’s, there’s not a lot

of people that have to experience something like that... and just being able to, to talk about that and get all that stress out I think really, really helped. I think chances are if I may not have been able to talk about that, I may have quit. It might have been a mistake” (Participant 6).

Employees’ Six-Month Follow-Up Interview

Seven employees (87.5%) participated in an interview six months after the initial interview. The purposes of this interview was to confirm that they agreed with the interpretations of the first interviews, the impact of having career conversations, as well as to hear about possible continued involvement in career conversations.

The participants’ feedback regarding the interpretations of the first interview was summarized in the previous section. There were 20 positive comments and four negative comments regarding the impacts on employees. The positive comments are summarized as four general themes. First, career conversations were perceived as providing employees with learning that could be applied to achieve their career needs and goals. The conversations also increased their consideration of career goals and their future. In addition, they felt more committed to career goals, such as furthering education and “moving up the ladder”. Lastly, they felt the conversations were a starting point for personal development. The one negative impact reported after the conversation was related to the lack of follow through by the manager. This lack of follow through was seen as being a lack of support and resulted in mistrust of the manager. This occurred, for example, when the manager promoted someone else, concerns were not dealt with or the manager did not talk with senior administration.

The majority of employees indicated that they no longer participated in career conversations at work, while four indicated that they still participated in career conversations that were either (a) informal, ongoing communication that was not as in-depth as the first conversation, or (b) more formal conversations that were similar to coaching sessions. Three of the participants said that the reasons for not continuing formal career conversations were because neither the managers nor themselves had initiated further conversations. Three others attributed the lack of follow through to their personal situations, for e.g., maternity leave or temporary employment.

Five out of the six employees indicated that they did not plan to have further career conversations at their workplace, however, three said that they would be willing to participate again if the manager initiated it. One employee said that it was important to continue with career conversations because, “If I intend to work my way up in the company, I want to know where I need to improve and what skills I need to develop”. When asked under what conditions they would participate in career conversations again, three employees said that if the company showed an interest in their career development they would participate, while two wanted information about what is possible within their place of work in terms of advancement.

Summary of the Employees’ Career Conversation Interviews

Although it is difficult to generalize the evaluation results regarding the employees’ experiences of career conversations due to the small sample size, the results were rich and informative. The feedback about the experience and impact of career conversations on employees was overwhelmingly positive, in that 85% of the feedback referred to helpful, as opposed to unhelpful aspects of the conversations. Sixteen percent of the total number of reported incidents referred to suggestions to improve career conversations.

The employees reported in the follow-up interviews that successful career conversations had a particular process that resulted in beneficial outcomes. The direct supervisor or manager, as opposed to an external consultant, was identified as the best person to conduct the career conversation. Prior to the conversation both the manager and the employee needed to prepare so as to provide realistic expectations and an individualized focus for employees. The process of productive career conversations was identified as involving the use of good facilitation skills and questions by the manager. This process allowed for the disclosure of challenges, frustrations and expression of emotions. Employees thought that good questions were straight forward, well sequenced and not too broad. Certain conditions fostered a positive interpersonal climate for the career conversation including being realistic and having a comfortable, open flow of dialogue. This was enhanced by having a manager who was perceived as being open and approachable. Having the career conversation at the workplace and on company time was also reported as being helpful, however, it was important not to have any distractions

during the conversation. It was also helpful when managers understood the employee as a person, believed in the employee's abilities and encouraged them to make individual plans toward goals. Useful topics during the conversation included the employee's current work and future goals. It was also helpful to utilize self-exploration tools, and be offered information about particular occupations or company specific career paths. Multiple or two-part career conversations were considered better than having a single conversation.

One of the beneficial outcomes of career conversations was that employees felt empowered to achieve their goals and participate in personal development. Employees had increased personal insights about their wants and needs that resulted in intentional improvements at work and future goal setting. Specifically, they had increased self-knowledge, were able to look inwards, could see how things change, and the ability to identify skills and attributes. There was also a sense that the company cared for the employee contributing to increased motivation to participate in the conversations and achieve goals. The employees reported increased trust and more open communication with the managers after the career conversation. They also learned from having their manager conduct the conversation because they understood the work situation and had a similar career path.

The percentage of comments in each category suggests that some incidents were more helpful for the employees. The following categories have the highest percentage of helpful incidents (63%) (a) initiating and assisting communication, (b) discussing work, goals, and future, (c) open and genuine interpersonal interaction, and (d) employers qualities and approach. These categories highlight the importance of the communication skills utilized by the manager who conducts career conversation, as well as focusing on the topics of the employee's work goals and future. The emphasis in the manager training seminar on communication skills training as well as the focus of career conversations is supported by this feedback. The incidents that were not helpful were (a) distractions and restrictions, (b) a lack of preparation, and (c) problems with initiating and assisting communication. These unhelpful incidents emphasize the importance of managers using good communication skills and taking the time to prepare for each conversation.

Feedback from employees six months after the career conversation suggested that the perceived benefits of career conversations persisted, as did the identified processes that facilitated successful conversations. In particular, employees learned how to achieve career goals and the conversations helped them consider these career goals. They felt more committed to the career goals and the conversations were a beginning for personal development. It was important, however, that the manager who conducted the career conversation needed to follow-through with stated intentions after the career conversation. If this did not happen, it could result in employee mistrust of the manager and the experience of not being supported.

After the first formal career conversations, employees and managers were more likely to participate in brief, informal ongoing communication rather than additional formal conversations. Career conversations did not continue, even though employees desired more conversations, if managers did not take the initiative to initiate them. Having the possibility for advancement within the company and the perception that the company had an interest in their career development encouraged employees to participate in future conversations.

RESEARCH METHODOLOGY

Development of Career Conversation Intervention

The career conversation intervention was developed from the conclusions drawn in the *Career Conversation Literature Review* (Butterfield, Lalande, & Borgen, 2008). Although there was not an existing, agreed upon definition on this topic for career conversation utilized in the literature, the term “career conversation” embraced the content, purposes and activities involved in career related dialogues between managers and employees. We defined career conversation as career related dialogue between managers and employees that is supportive of employees’ career management. Career conversation topics include: (a) sharing of information related to career management, (b) the employee’s skills and abilities, (c) information about the job and possible career paths within the current workplace, (d) employee career goal setting, (e) training opportunities aligned with the employee’s career goals, and (f) the formation of action plans. The purposes of career conversations are to facilitate the development of specific goals and a plan for employee development that is mutually beneficial to the employee and the organization.

The ideal timing of a career conversation is separate from an annual performance review because it is more future focused and can draw upon information already shared in the annual review. The responsibility for career conversations is shared between the company (providing time for the conversation and support for training), the manager who can initiate and conduct conversations, and the employee who is ultimately responsible for participating in the conversation, engaging in a career planning process and implement action plans for personal development to achieve goals.

The career conversation model utilized in the manager training guide and employee workbook is adapted from the *Starting Points: Finding your Route to Employment Program* (Westwood, Amundson & Borgen, 1994). This program used a model to discover difficulties as well as options to overcome the difficulties. The career conversation intervention is based upon a career development model that guides the career conversation process and outcomes. The *Manager Positioning System* (MPS) and *Employee Positioning System* (EPS) were developed as frameworks for the career

conversation process (Borgen, Lalande, & Butterfield, 2009). These frameworks each consist of a number of challenges along with options to overcome these challenges. The EPS refers to the challenges and options employees have when participating in career conversations. The MPS parallels the challenges and options in the EPS, but refer to challenges and options managers have in implementing the career conversations.

The *Career Conversation Literature Review* (Butterfield, Lalande, & Borgen, 2008) also indentified the need to identify the specific skills and knowledge required by both the manager and employee to participate in successful career conversations. To this end, a manager training seminar was developed along with a workbook that employees can utilize in preparing for a career conversation (Lalande, Borgen, & Butterfield, 2009).

Manager Training Seminar

The objectives of the manager training seminar are for managers to:

1. Enhance their understanding of the aims and objectives of career conversations,
2. Examine potential challenges to implementing career conversations in a place of work,
3. Review their personal assets and the resources they can access in successfully engaging in career conversations with employees,
4. Enhance their understanding and abilities by practicing conducting career conversations, and
5. Develop action plans for addressing challenges in conducting effective career conversations in a place of work.

These objectives are accomplished during a 12-hour seminar that can be offered in two days or four-half day sessions. Managers need to have excellent communication skills required to facilitate career conversations. The managerial participants received the *Orientation to career conversations – Manager Guide* (Borgen, Lalande, & Butterfield, 2009) providing worksheets and information about conducting career conversations. There is also an *Orientation to Career Conversations – Facilitator Guide* (Lalande & Borgen, 2009) for facilitators of the manager training seminar.

The manager training seminar devotes about 25 percent of the time to skill review and practice. To facilitate the skill practice as well as the ability to move through the

phases of a career conversation, checklists were developed and provided to the managers. These checklists were utilized during the training seminar to teach the required skills and are offered as a reference that managers can utilize when conducting career conversations in their workplaces. To conduct career conversations, it is also important for managers and employers to have access to knowledge about the organization or workplace, such as job profiles, career paths, company goals and plans, and existing support for training and development. Information about how to access this information is provided in the manager training seminar.

Employee Workbook

The *Career Conversations: Employee Workbook* (Lalande, Borgen, & Butterfield, 2009) was developed for employees to use as a resource to prepare for participating in a career conversation with their manager. It also offers resources for managers to use while conducting a career conversation. The objectives of this workbook are to:

1. Assist the employee in considering relevant information that is needed to make career decisions and plans,
2. Identify what is needed before decisions and plans can be made, and
3. Determine how to access information and support to help the employee meet these needs.

It is organized according to the common challenges employees experience while participating in career conversations, offering options for overcoming these challenges.

The research findings are focused on the evaluation of the managers' career conversation training seminar, the impact of career conversations on the employees', and the managers' perception of conducting career conversations. Various qualitative methods were used to gather and analyze the data. Questionnaires and interviews were the main data collection methods. The managers' three-month follow-up interview and employees' first interview used the Critical Incidents Technique (CIT) (Flanagan, 1954). The qualitative methods used to analyze most of the interviews were Braun and Clarke's (2006) thematic analysis procedure and Butterfield, Borgen, Maglio, & Amundson's (2009) Enhanced Critical Incident Technique (ECIT).

Recruitment

Managers were recruited first by means of word-of-mouth, a recruitment postcard, and a recruitment poster placed on an Internet-based networking tool called LinkedIn. After the managers were recruited and had attended the training seminar, research team members placed posters at the recruited managers' place of work to recruit employees. The poster indicated that the employees were to contact the research team directly if they were interested in obtaining more information or volunteering. At no time were prospective participants approached directly by their managers to participate in this research study.

Procedure

Two two-day career conversation training seminars were held for the managers approximately at the same time; one in Vancouver and one in Calgary. The Vancouver career conversation training seminar was facilitated by Dr. William Borgen (University of British Columbia) and Dr. Lee Butterfield (Adler School of Professional Psychology), and the Calgary career conversation training seminar was facilitated by Dr. Vivian Lalande Vivian Lalande (University of Calgary) and Melissa Gray Melissa Gray (University of Calgary Masters of Counselling Psychology Student and Research Assistant). Within the training seminars, the facilitators reviewed a consent form or evaluation agreement with the managers for them to sign. At the end of the training seminars, the managers were given a digital audio recorder to use during their career conversations with their employees and then to keep for their own personal use. As well, they were informed of how the employees were to be recruited to participate in the study and instructed not to approach their employees personally about participating in the study.

Employee recruitment posters were placed at the managers' workplaces after the training seminar. The acknowledgment of their manager's participation in the research study was not divulged until the employees volunteered to participate and were screened to ensure he or she met all the recruitment criteria. After a minimum of 24 hours of the employee agreeing to participate, the employee was contacted to review and sign the informed consent form.

Once the employees were recruited, they were asked to complete the *Orientation to Career Conversations: Employee Workbook* (Lalande, Borgen, & Butterfield, 2008) before attending their career conversation with their manager. Also, the managers were informed of their employee's recruitment. When they were available to do so, the managers and employees were asked to complete an audio recorded career conversation.

Data Collection

Managers

At the end of the training seminar, managers were asked to fill out an evaluation form. It inquired about their engagement in the training seminar in terms of what they understood of career conversations before and after the seminar and if they found the training seminar useful. The format of the evaluation form was a successful quantitative evaluation form originally designed for a Counselling and Guidance in TVET workshop (Borgen, 2008). It started with Likert scales and ended with open-ended questions. First, the managers were asked to use a Likert scale from Unacceptable to Acceptable to compare their knowledge of career conversations before and after the seminar. The areas of focus included: (a) a clear understanding of the aims and objectives of career conversations, (b) the knowledge regarding potential challenges to implementing career conversations in the workplace, (c) knowledge about the manager's personal assets and the accessible resources to successfully engage in career conversations with their employees, (d) a clear understanding of how to conduct career conversations, and (e) a developed action plan for addressing challenges in conducting effective career conversations in the workplace. Next, the managers were asked to use the same Likert scale to evaluate their general experience within the seminar. They were asked: (a) How useful did they find the seminar? (b) How would they rate the seminar facilitation? (c) How would they rate the seminar facilities (room, etc.)? and (d) How would they rate the food? The third component of the evaluation was on the seminar topics. This was the last component using the Likert scale from Unacceptable to Acceptable. The topics that were rated included: (a) information related to career management, (b) employee skills and performance, (c) job and career path options within the workplace, (d) training options, (e) mentorship opportunities, (f) career goal setting, and (g) development of action plan

(progress toward setting a plan). The last component of the evaluation form involved written responses. It consisted of three questions: (1) What were the 3 best features of this seminar for you? (2) What were the 3 features of this seminar that were less relevant for you? and (3) Please provide additional comments about the seminar. See Appendix A for a copy of the *Career Conversation Seminar Evaluation* form.

Career conversation. When they were available to do so, the managers and employees scheduled and completed the career conversation. Seven audio recording (.wav files) were emailed in by the managers to one of the research team members.

Managers' first interview. After the career conversation, the managers were contacted to conduct an audio recorded follow-up telephone interview aimed at understanding the usefulness of the training seminar to conduct career conversations. The interviews were completed within a month of completing the career conversation. There were seven interview questions in total and some had two parts. They were: (1) Tell me what you liked about the training seminar; (2) Tell me about what could be improved in the training seminar; (3) Did the seminar enhance your understanding of the aims and objectives of career conversations? Tell me about your understanding of the aims and objectives; (4) Did the seminar help you to examine potential challenges to implementing career conversations in your place of work? Tell me about the challenges you identified; (5) Did the seminar help you to review your personal assets and the resources you can access in successfully engaging in career conversations with employees? Tell me the assets you identified; (6) Did the seminar enhance your understanding and abilities to conduct career conversations? Tell me what you learned by practicing the conversations in the seminar; and (7) Did you develop action plans for addressing challenges in conducting effective career conversations in your place of work? Tell me about your action plans. A copy of the *Managers' First Interview Guide* can be found in Appendix B. Six managers completed the managers' first interview.

Managers' three-month follow-up interview. Three to five months after the career conversation, the participants were contacted again to complete the next phase of the research study. The managers were contacted to schedule a time to complete a semi-structured CIT (Flanagan, 1954) audio recorded telephone interview. The interview began with a contextual question about their experience participating in the career

conversation project. Next, they were asked what helped them to conduct the career conversation. The research assistant conducting the interview followed-up with appropriate probing questions to ensure clarity and to identify the importance and an example of each helpful incident. Once the manager finished sharing all the helpful factors, the same line of questioning was used to gather the hindering incidents and wish list items related to conducting a career conversation. Wish list items were things that were not available to them that would have been helpful if they had been present. The interview ended with collecting demographic information about the manager. See Appendix C for a sample of the *Managers' Three-Month Follow-Up Interview Guide*. Six managers completed this interview, and three expressed an interest to withdrawal at this point.

Managers' six-month follow-up interview. Between six to eleven months after the career conversations between the managers and employees, the participants were contacted to schedule a time for the last interview. In an email, it was explained that the interview will entail a review of the data analysis of their second interview (also known as the *cross-checking by participant* credibility check; Butterfield et al., 2009) and to answer interview questions about the impacts of the career conversations. Two of the managers who expressed an interest to withdraw from the study after the managers' three-month follow-up interview were only asked to review the data analysis. The intention of the interview questions was to better understand the managers' perception of the impacts of conducting career conversations within their place of work. At the time of scheduling an appointment, the managers were emailed a file containing the theme categories identified in the managers' three-month follow-up interview and the manager's extracted incidents from his or her own interview. The incidents were generated by the managers quotes. The managers were requested in the email to review the file before the interview to familiarize themselves with the content and identify any discrepancies they see with the incidents and themes, and how they had been matched together. The managers' six-month follow-up interview started with four interview questions. The managers were first asked two contextual questions: (1) How many career conversations have you conducted to date? and (2) How many career conversations have you conducted since the career conversation seminar? Next, two thematic questions were asked with

follow-up probing questions, including: (1) Are you continuing to conduct career conversations with your employees? If the manager said “no”, the manager was asked what lead him or her to stop conducting career conversations? If the manager said “yes”, the manager was asked if there were any modifications made to the career conversation process for his or her own situation? and (2) What has the impact been of conducting career conversations? Appropriate probing questions were used to ensure clarity of the manager’s responses. If the manager didn’t understand the questions or had trouble answering, the research assistant rephrased the questions. See Appendix D for a copy of the *Managers’ Six-Month Follow-Up Interview Guide*. When the interview questions were all answered, the managers were then guided to complete the second component of the interview: the ECIT cross-checking by participant credibility check (Butterfield et al., 2009). The managers were asked if they had been able to review the incidents and categories before the interview and if they had any questions. If needed, the documents forwarded to the managers were explained and any expressed discrepancies found by the managers were noted. At the end of the interview, the managers were asked if they had any questions and if they were interested in receiving a copy of the final research study. The managers’ responses were addressed and they were thanked for participating in the research study.

Employees

The employees were provided an employee career conversation workbook which was to be completed before the career conversation. In addition, to the career conversation, they also completed two interviews.

Employees’ first interview. As with the managers, the employees were contacted right after the career conversations. An in-person CIT (Flanagan, 1954) interview was arranged within one to three months after the career conversation. A semi-structured interview guide was followed to find out what the employees found to be helpful in the career conversation, what was not helpful, and whether there were things that would have been helpful but were not included. The interview started with a review of the employees’ consent form and their involvement in the research study. Once the employees were ready to proceed, the research assistant started to audio record the interview and asked a number of contextual questions. This was to get the employees

accustomed to discussing their experience. The employees were asked to share information about their career needs and goals, whether or not their career goals and needs were being met through their company, their relationship with their manager, and any past experiences having engaged in career-related dialogue with their managers. Next, the CIT part of the interview started with the question “What aspects of the career conversation do you think were helpful and made it meaningful to you?” The research assistant probed as needed to recognize the importance and an example for each helpful incident. Once the employees could not identify any new helpful incidents, the same line of questioning was used to identify the hindering incidents and wish list items that would have helped improve the career conversations to be more successful and meaningful. The last question asked to the employees before gathering the demographic information was to rate the effectiveness of the career conversation on a scale from 0 to 10. A copy of the *Employees’ First Interview Guide* can be found in Appendix E. Eight employees took part in the employees’ first interview.

Employees’ six-month follow-up interview. Six to eleven months after the career conversation, the employees were contacted to schedule the last interview and review the data analyzed from their first interview (cross-checking by participant credibility check; Butterfield et al., 2009). Further information on how the participant cross-checking credibility check was conducted can be found under the Data Analysis section below. The employees’ six-month follow-up interview was intended to better understand the employees’ perspective of the impacts of conducting career conversations. The interview questions included: (a) Are you still involved in having career conversations with your manager or supervisor? (b) What has the impact been of engaging in the career conversation? (c) How many career conversation discussions have you had with your manager to date? (d) What are your plans with respect to continuing to engage in career conversations? and (e) Is there anything further you need from the research team? The research assistant followed up with the appropriate probing questions indicated on the interview guide. As with the managers, the employees were thanked for participating in the research study and informed how the results would be made available to them. The *Employees’ Six-month Interview Guide* can be found in Appendix F.

Data Analysis

The data collected throughout this study was analyzed in several ways. In some cases, such as the managers' training evaluation form, the changes in response were compared. A checklist from the managers' training manual was used to assess the managers' skills in their recorded career conversations. Also, a thematic analysis methodology was used for the first and follow-up interviews. The data analysis procedure varied slightly, depending on the format and timing of the interview.

Questionnaires

There was one questionnaire administered. The managers were asked to evaluate the career conversation training seminar using an evaluation form. The written responses were consolidated and the Likert scale questions were averaged. The written open-ended questions were grouped together to identify common themes and the number of responses in each group were noted.

Checklist

The checklist from the *Orientation to the Use of Career Conversations: Participant's Guide* (Borgen et al., 2008b) was used to assess the career conversation skills and abilities demonstrated by the managers in their recorded career conversations. There is a sample of the *Career Conversation Checklist* in Appendix G. Two research team members listened together to the audio recorded career conversation. One of the research team members listened for the manager to expand the exploration of the career conversation ideas, discuss possibilities, and encourage the employee to take action, as discussed in the managers' training seminar. All of these skills are outlined on the first page of the checklist. In terms of expanding the exploration of ideas, a research team member listened specifically for the manager to: (a) start the general opening interaction; (b) clarify the purpose of the conversation; and (c) review and identify any relevant challenges on the EPS, such as not knowing where to begin, not knowing what options are available to them in the organization, not knowing if they have the skills or attributes, not knowing if they have the support required, and not knowing how to make the ideas happen. The areas that the research team member was listening for in terms of discussing the possibilities included: (a) discussing the employee's reactions to the EPS, such as

expressing an understanding or normalizing the employee's feelings; (b) discussing the options connected to the challenges relevant to the employee, such as providing information, referring the employee to their workbook, encouraging self disclosure, providing resources, suggesting job options and possible career paths, creating a personal inventory and skill development, creating a personal and work support network, and charting a plan of action. For the last section of the checklist, the research team member listened for the manager to encourage the employee to take action. In particular, the manager was evaluated for their demonstrated ability to discuss possible action planning strategies using options to address identified challenges and encouraging further contact to discuss the challenges associated with implementation of the action strategies. The second research team member was focused on identifying when the manager demonstrated the skills and abilities on the second page of the checklist. The category names and their skill sets included: (a) hearing the employee's perspective - active listening, paraphrasing, primary empathy, open questions, clarifying questions, and summarizing; (b) providing another perspective - information giving, strength challenge, and self-disclosure; and (c) planning action - goal setting/contracting. The research team members also noted any additional skills the managers demonstrated that were not already on the checklist.

Interviews

Each audio recorded interview was transcribed by either a research team member or an outsourced professional transcriber. The Braun and Clarke (2006) version of thematic analysis approach was applied to all the interviews. The ECIT (Butterfield et al., 2009) process was followed to conduct and analyze the CIT (Flanagan, 1954) interviews. A couple of the credibility checks of the ECIT process were also applied to the non-CIT interviews thematic analysis process, except for the managers' six-month follow-up interview. The following section explains the data analysis of the CIT and non-CIT interviews in more detail.

CIT interviews. The transcriptions of the CIT interviews were converted and entered into a qualitative research software program called ATLAS.ti. As outlined by Braun and Clarke (2006), coding was completed in three phases. ECIT credibility checks were also included in the phases to ensure credibility of the findings (Butterfield et al.,

2009). The first phase of coding involved highlighting and coding the participants' statements according to the contextual questions. Each helpful, hindering, and wish list item was coded by incident, its importance, and an example. Once the coding was completed, 25% of the transcripts were randomly selected and emailed to a second research team member with a guideline explaining how to code the transcripts to complete the *independent extraction of critical incidents* credibility check (Butterfield et al., 2009). The Guidelines for Coding Employees' CIT Interviews transcripts can be found in Appendix H. Once the second research team member completed the task, the codes were emailed back to the original research team member to compare and determine the percentage of agreement. Every code discrepancy found between the first and second research team member were discussed and resolved. The independent extraction of critical incidents credibility checks for both the managers' and employees' CIT interviews resulted in a 100% agreement rate.

Next, the codes were reviewed to generate categories (Braun & Clarke, 2006). The codes were reviewed to identify common patterns and grouped into possible categories. The *participation rate* credibility check (Butterfield et al., 2009) was completed by calculating how many participants contributed a code to each category. For example, if of the six managers interviewed three of them contributed a total of nine codes assigned to a category (out of a total of 50 codes found in the study), then a 50% participation rate was reported ($3 \text{ participants} / 6 \text{ total participants} \times 100$) with a frequency rate of 18% ($9 \text{ assigned codes} / 50 \text{ codes in total} \times 100$). The strength of the categories were determined by the level of participation and frequency rates. The higher the rate, the stronger the category is considered to be (Borgen & Amundson, 1984).

The *placing incidents into categories by an independent judge* credibility check was conducted next (Butterfield et al., 2009). A research team member randomly chose 25% of the codes and emailed them to a second research team member with the generated categories and their operational definitions. The second research team member matched the codes to the themes and sent them back to the first research team member to compute the match rate (Butterfield, Borgen, Amundson, & Maglio, 2005). The match rate was a comparison of the number of the codes matched to the same category by both research team members. The match rate of the managers' CIT data analysis was 100% and the

employees' was 67%. According to Andersson and Nilsson (1964), a match rate of 80% and better is considered creditable. All discrepancies found in the CIT interview matched codes were resolved between the research team members to achieve a 100% agreement rate (Andersson and Nilsson, 1964; Butterfield et al., 2009).

Another ECIT credibility check administered by the research team was the cross-checking by participants (Butterfield et al., 2009). The participants were emailed a copy of their own codes (also referred to as incidents) and their matched categories. In the email, the participants were requested to review the codes and categories and consider the following questions outlined by Butterfield et al. (2009): (a) Do you feel the helping/hindering incidents and wish list items are correct? (b) Are there any missing? (c) Do you feel there is anything that needs to be revised? and (d) Do you have any other comments to add? These questions are to ensure the participants feel comfortable with the research team's interpretations of the data collected and analyzed. A copy of the *Employees' Credibility Check by Participant Interview Guide* is in Appendix I.

Discrepancies expressed by the participants were handled in a slightly different manner. The employees had the final say with the identified critical incident items and wish list items and their matched themes. If the employees expressed a discrepancy with the identified critical incident items or wish list items, then the item was removed from the results. If the managers expressed a discrepancy with the items or matched categories, the research team member made a note and later forwarded it to one of the lead investigators to determine the appropriate course of action.

Some of the employees were unable to complete a follow-up interview over the phone, so the questions were emailed to the participants to complete and email back. This approach was also taken with two managers who chose to withdraw from the study after the managers' three-month follow-up interviews.

After the cross-checking by participants, the lead investigators also completed the *expert opinion* credibility check (Butterfield et al., 2009). The lead investigators reviewed the categories and considered the following questions: (a) Are the themes useful? (b) Are they surprised by any of the themes? and (c) Is there anything missing based on their experience? (Butterfield et al., 2005; Butterfield et al., 2009; Flanagan, 1954).

According to Butterfield et al. (2009), the last two credibility checks to be completed as part of an ECIT study are: the *theoretical agreement* and *reporting the results*. Both of these credibility checks were addressed in the previous section: Evaluation Results.

Non-CIT interviews. There were two types of non-CIT interviews conducted in this study. The first was the managers' first interview after the audio recorded career conversation. The second was the managers' six-month follow-up interview regarding the impacts of conducting career conversations. The data analysis process for these two non-CIT interviews was conducted as follows.

The data analysis process used for the managers' first interview was similar to the process used for the CIT interviews. The Braun and Clarke (2006) version of the thematic analysis approach was used with the ATLAS.ti software to identify and code the data extracts. A number of the ECIT credibility checks were also conducted (Butterfield et al., 2009). The credibility checks included: (a) the *independent extraction of critical incidents*, (b) the *participation rate*, (c) the *placing incidents into categories by an independent judge*, (d) the *expert opinion*, (e) *theoretical agreement*, and (f) *reporting the results*. A copy of the *Guidelines to Coding the Managers' First Interview* data can be found in Appendix J. The percent of agreement of the *independent extraction of critical incidents* or data extracts was 72% (Butterfield et al., 2009). After the discrepancies were discussed between the first and second research team members, there was a 100% agreement rate. The *placing incidents into categories by an independent judge* had a match rate of 96% (Butterfield et al., 2009). After the discrepancy discussion, there was a 100% concordance rate. When generating the categories, participation rates and frequency rates were also considered and reported in the Results section. The main difference of the data analysis of the managers' first interview and the CIT interviews involved the analysis of the managers' first interview credibility checks. The managers' first interview data analysis did not include the ECIT *cross-checking by participants* credibility check (Butterfield et al., 2009).

The managers' six-month follow-up interview data set was analyzed differently due to a time constraint to complete the project. The interviews were not audio recorded. Instead, the research team member took notes during the interview and began to generate

ideas for the themes during and after the interviews. Operational definitions were also created for each categorized theme. For the two contextual questions at the beginning of the interview, the average was computed. Only a few of the ECIT credibility checks were completed, including: (a) the *participation rate*, (b) the *expert opinion*, (c) *theoretical agreement*, and (d) *reporting the results* (Butterfield et al., 2009).

Methodology Summary

The methodology to study the effectiveness of the career conversation intervention involved two type of questionnaires and two type of interviews. The Braun and Clarke (2006) thematic analysis procedure was followed to assess the interviews along with a number of credibility checks outlined by Butterfield et al.'s (2009) ECIT. The participants involved managers and employees who were recruited separately from the same workplaces. A number of managers withdrew from the study for various reasons, including: not being able to implement the career conversation within their place of work and employees not volunteering from their place of work to participate in the research study. The managers and employees both completed evaluations, participated in an audio recorded career conversation, and completed interviews.

IMPLICATIONS AND DISCUSSION

SME's in Canada often face human resource challenges to retain and train employees so as to meet the demands of a dynamic workplace. For SME's to remain competitive, employees must update skills and knowledge in accordance with changing organizational strategies and goals. Employees who have clear and dynamic career goals can result in increased commitment to the employer and motivation for personal development. Although this is true in businesses of all sizes, for SME's, that often lack human resource departments, the challenge of providing employee retention and development initiatives is particularly difficult. In Canadian SME's, both managers and employees identified the need for supporting career management within the workplace as the participation of career planning, training and achievement of career goals was considered to be beneficial to both the employee and the company.

Career conversations were identified as a potentially innovative human resource intervention for SME's that could address this issue. Career conversations refer to a career related dialogue between managers and employees that is supportive of employees' career management. Although the career conversation intervention has been utilized in organizations in other contexts, the intervention has not been standardized in terms of a clear definition, specified goals and outcomes, particularly for application in SME's. The purpose of this project was to develop the career conversation intervention, implement it in SME's and conduct an evaluation of the intervention outcomes utilizing the Evidence Based Evaluation Framework for Career Development Interventions (CRWG, 2010).

Generalizing the Findings

Although the results of the evaluation of the career conversation intervention in SME's are informative, there are limits regarding the generalization of these results due to the sample size. The recruitment of managers to participate in the career conversation sessions was very difficult. This is likely an issue due to the multiple roles and busy schedules of managers in SME's. With a small training group, the number of employees who participated in career conversations was also limited, resulting in a small sample.

Strategies to recruit larger groups of managers will be needed to further test this intervention with a larger sample to give more robust results.

The project also spanned a particular societal context in which there was a downturn in the Canadian economy. Businesses went from a shortage of qualified employees to needing to lay off employees. This transition occurred between the manager training session and the implementation of the career conversation intervention in their workplaces. Consequently the results may reflect this context and it will be important to replicate the research in other contexts. However, the positive evaluation results suggest that career conversations are useful for SME's in a variety of changing economic times, but it becomes more difficult to implement them when other business priorities arise.

The methodology utilized was also qualitative, relying on self-report and interviews. Because this career conversation intervention had not been previously evaluated, it was decided to use qualitative evaluation methodology as a way to explore possible outcomes in depth. The research has resulted in the identification of a number of outcome factors that can now be utilized in future quantitative evaluation research to determine if the findings can be generalized to larger, more diverse samples.

The Career Conversation Intervention

Managers and employees in SME's reported positive outcomes from the career conversation intervention, the manager training seminar, and the supporting resources. The following career conversation topics were relevant and utilized during the actual workplace conversations (a) sharing of information related to career management, (b) the employee's skills and abilities, (c) information about the job and possible career paths within the current workplace, (d) employee career goal setting, (e) training opportunities aligned with the employee's career goals, and (f) the formation of action plans. Career conversations accomplished the intended goals of (a) the development of specific goals and a plan for employee development, and (b) the employee goals and development plans are mutually beneficial to the employee and the organization. Employees perceived successful career conversations as being most helpful when the manager utilized strong communication skills, as well as focused on the topics of the employee's work goals and future.

It was important for managers to follow through with any commitments that were made to the employees during the conversation. Lack of manager follow-through was interpreted as being unsupportive or resulted in a lack of trust in the manager. Although employees desired ongoing conversations with the managers, this was less likely to occur if neither the manager nor the employee took initiative to follow-up after the first conversation. These factors may need emphasizing during the manager training seminar.

Manager Training Seminar

The manager training seminar was effective in achieving the objectives for acquisition of career conversation and knowledge. These outcomes were evident immediately after the seminar and six months later. The best features of the seminar were the topics, the diversity of experiences and the group training format. Potential improvements to the seminar include having more emphasis on strategies to overcome challenges of implementing career conversations in the workplace, although this may not be a relevant change if the economic climate is better or if managers are referred to the training with the support of the workplace. As noted above manager follow-through with commitments made to employees and taking initiative to have multiple conversations can also be highlighted in the training.

Impact of Career Conversations on Employees

Employees reported many beneficial outcomes as a consequence of career conversations. As outlined in the results section, they felt empowered to achieve their goals and participate in personal development. Employees had increased personal insights about their wants and needs that resulted in intentional improvements at work and future goal setting. Specifically, they had increased self-knowledge, were able to look inwards, could see how things change, and the ability to identify skills and attributes. Employees who have clear and dynamic career goals also reported increased commitment to the employer and motivation for personal development. There was also a sense that the company cared for the employee contributing to increased motivation to participate in the conversations and achieve goals. The employees reported increased trust and more open communication with the managers after the career conversation.

They also learned from having their manager conduct the conversation because they understood the work situation and had a similar career path.

The employees reported that career conversations continued to be helpful six months after the conversations. They learned how to achieve career goals and the conversations helped them consider these career goals. They felt more committed to their goals and the conversations were a beginning for personal development.

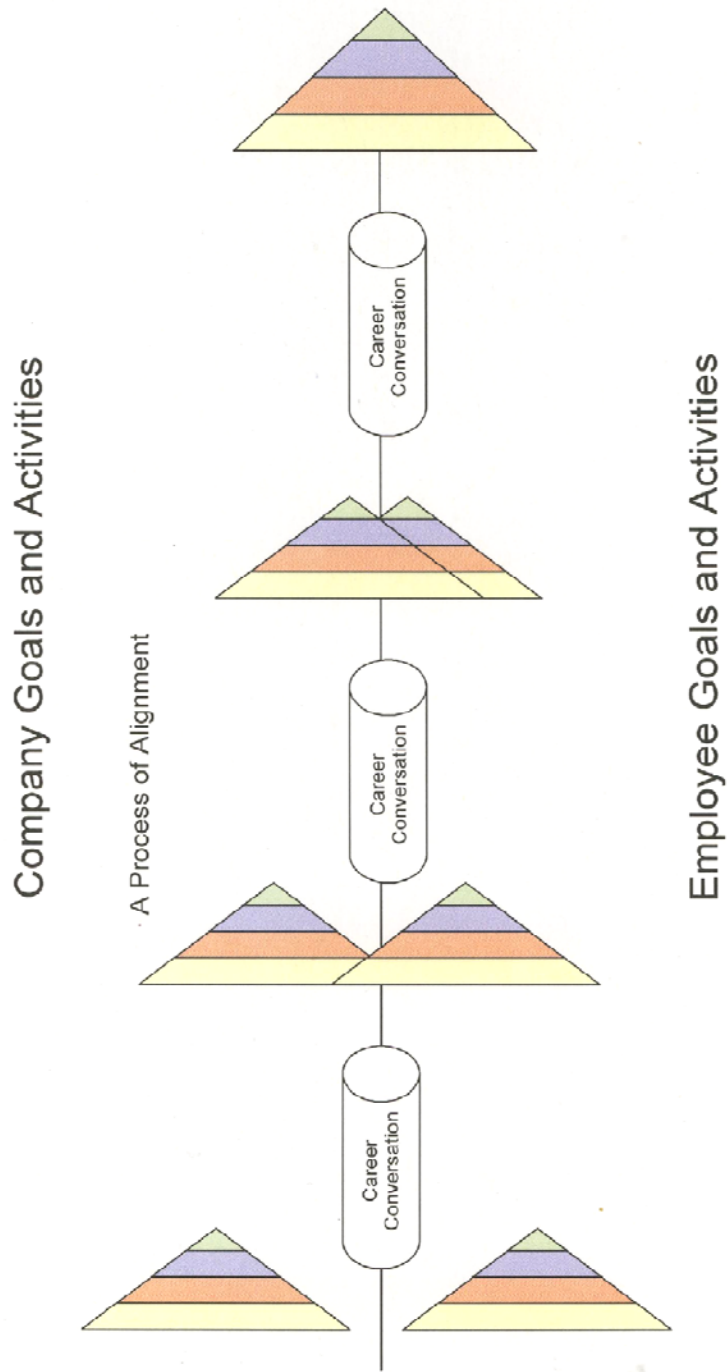
Impact of Career Conversations on Organizations

Although the direct impact of career conversations on the businesses was not measured, the results indicate that the outcomes are likely to be very positive. Six months after the initial career conversation, there is evidence to suggest that career conversations had positive impacts on the managers and employees. Managers reported wanting to continue career conversations and were interested in improving how to conduct conversations. They believed that career conversations had a positive influence on their roles as managers and improved their relationships with employees. They reported beneficial impacts upon the employee's career development and workplace performance, such as making more of an effort in the workplace, taking a course, and following up with the manager's requests. Career conversations increased their awareness of discrepancies between employee skill levels and the organization training program qualifications resulting in the need to rectify this issue. These results suggest that career conversations have the potential to benefit businesses by: (a) improving manager-employee relationships, (b) improving employee work performance, (c) aligning employee goals with organizational goals, and (d) providing more meaningful training programs.

Employees reported increased ability to formulate career plans that aligned with the workplace needs. Supporting the employees' career management in a systematic way benefits organizations in achieving their business goals (Chartered Institute of Personnel Development 2003, 2005) as portrayed in Figure 6. Career development practices such as these help businesses attract and retain high performing employees (Simonsen, 1999; Kappia, Dainty & Price, 2007; Laabs, 1996; Sullivan & Mainiero, 2007; US Black Engineer & Information Technology, 2007). Retention of employees results in cost

savings as recruitment of new employees is expensive (Kidd, Hirsh, & Jackson, 2004; Yemm, 2005).

Figure 6: *Process of Alignment of Business Goals and Employee Goals*



The Career Conversation Literature Review (Butterfield, Lalande & Borgen, 2008) noted that research suggested that career conversations had value for larger organizations and employees within these organizations. Although, employees are expected to initiate their own career management, the literature indicates it is in the organization's and managers' best interest to support their employees' career development (Gambill, 1979; Kidd et al., 2004; Thompson et al., 1986). The shift in the psychological contract indicates that managers are required to change their management style to one that involves the employees more in the decision-making process and business goal awareness (Ballout, 2007). The results of this project suggest that career conversations also have these benefits for SME's.

The career conversation intervention has been demonstrated to have value in Canadian SME's. This is an intervention that requires moderate resources for implementation in companies where human resources support is minimal. To implement career conversations in a business requires manager participation in a 12-hour training seminar. Both employers and employees need to spend preparation time to prepare for each conversation that can range from 15 minutes to an hour. The potential reported benefits are extensive considering this limited investment of resources.

Recommendations and Next Steps

The findings of this research suggest a number of possible avenues for the use of career conversations and further research. These important recommendations for follow up are listed below.

Recommendation 1: Promote the use of career conversations in SME's

Because career conversations require few resources and have demonstrated positive outcomes for employees and managers of SME's it is important to have more SME's adopt this practice. To this end the results of this research needs to be widely disseminated to SME's in Canada. They also need to be informed of the availability of the resources for conducting career conversations:

1. Orientation to career conversations – Manager Guide.
2. Orientation to Career Conversations – Facilitator Guide.
3. The Career Conversations: Employee Workbook.

Although these resources are available on the Career Development Foundation Website, they should also be available in organizations that serve SME's such as the Chamber of Commerce and small business development services.

Recommendation 2: Recommend that managers receive career conversation training

Although the resources are available for managers to conduct SME's we recommend that they receive formal training before implementing this strategy in their businesses. This research highlights the importance of the use of communication skills and knowledge about the career conversation process in facilitating successful career conversations. The career conversation manager training has demonstrated that managers acquire these abilities from participation in the training. Scandura (1992) identified seven types of relationships that can result from dysfunctional career development interventions in the workplace, particularly mentoring. These include negative relations, sabotage, conflict, submissiveness, deception, and harassment. He concluded that negative mentoring relationships can be quite costly to organizations.

The career conversation training programs should be offered by qualified professionals and advertized to SME's wherever the resources are made available. It is also important to train additional training professionals who can offer career conversation training in a variety of Canadian locations.

Recommendation 3: Replicate the evaluation research with different samples

This evaluation research should be continued with a variety of different types of businesses to determine if the results can be generalized across different sectors. It would also be important to include larger samples of types of employees and managers to determine if outcomes vary accordingly. For example, employees who represent different cultures may respond to career conversations in different ways. These kinds of results would have implications for the addition of information regarding cultural sensitivity to the career conversation training.

Recommendation 4: Utilize a quantitative evaluation methodology for future research with larger samples

Now that the outcome factors have been identified, standardized measures can be utilized with larger samples of employees to determine pre and post test evaluation results. This will improve the generalizability of the results.

Recommendation 5: Conduct research to determine the impact on organizations using career conversations

When a SME adopts the career conversation strategy within their business, they should be invited to participate in research to determine the impact on factors such as employee turnover, employee training, and profit/loss. As the numbers of businesses that utilize career conversations increases, it will be possible to determine the impact of this strategy on the organization relative to the resources required. Considering the potential value of career conversations for businesses that was indicated by the positive results of this research, it is important to demonstrate these results. The implementation of career conversations as a regular business practice has demonstrated value for employees, managers and, very likely, the bottom line of businesses as they navigate a dynamic and competitive global context.

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APPENDIX A

Career Conversations Seminar Evaluation

March 30 – 31, 2009

- Enhance understanding of the aims and objectives of career conversations,
- Examine potential challenges to implementing career conversations in your place of work,
- Review your personal assets and the resources you can access in successfully engaging in career conversations with employees,
- Enhance understanding and abilities by practicing conducting career conversations,
- Develop action plans for addressing challenges in conducting effective career conversations in your place of work.

In responding to the general questions, please use a two-step process:

(I) decide on whether the characteristic in question is acceptable or unacceptable, then

(II) assign the appropriate rating:

- (0) Unacceptable,
- (1) Not really acceptable, but almost there,
- (2) Minimally acceptable (but still OK),

Graphical Example

Unacceptable		Acceptable		
0	1	2	3	4

Compare your knowledge before and after the seminar.

Regarding the seminar objectives, and knowing what you know now, how would you rate yourself before the seminar, and how would you rate yourself now?

	Before Seminar					After Seminar				
	Unacceptable		Acceptable			Unacceptable		Acceptable		
	0	1	2	3	4	0	1	2	3	4
1. Clear understanding of the aims and objectives of career conversations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Knowledge regarding potential challenges to implementing career conversations in my workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Knowledge about your personal assets and the resources you can access in successfully engaging in career conversations with employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Clear understanding of how to conduct career conversations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Developed action plan for addressing challenges in conducting effective career conversations in your place of work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Unacceptable		Acceptable		
	0	1	2	3	4
Generally seminar experience					
1. How useful did you find the seminar?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. How would you rate the seminar facilitation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. How would you rate the seminar facilities (room, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. How would you rate the food?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Learning Assessment Instructions

For each component of the seminar topics listed below, please assess how useful that component was for you, using the 5-point scale below:

- (0) Negligible,
- (1) Inadequate,
- (2) Useful,
- (3) Very useful,
- (4) Outstanding.

Graphical Example

Unacceptable		Acceptable		
0	1	2	3	4

Seminar Topic	Unacceptable		Acceptable		
	0	1	2	3	4
1. Information Related to Career Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Employee Skills and Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Job and Career Path Options within Workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Training Options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Mentorship Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Career Goal Setting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Development of Action Plan (Progress toward Setting a Plan)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What were the 3 best features of this seminar for you?

1. _____
2. _____
3. _____

What were the 3 features of this seminar that were less relevant for you?

1. _____
2. _____
3. _____

Please provide any additional comments about the seminar in the space below.

APPENDIX B

Managers' First Interview Guide Career Conversation 2009-2010 Research Project

Participant #: _____ Date: _____

Interview Start Time: _____

Within this interview, I'm conducting an evaluation of the career conversation training seminar that you just completed on March 31st. I'm interested in knowing your perspective of the training. I would like to know what you liked, what you didn't like, what you found helpful and what improvements could be made to make the training seminar more helpful. There are seven questions and this interview will take approximately a half an hour to an hour. Do you have any questions before we get started?

APPENDIX C

Managers' Three-Month Follow-Up Interview Guide Career Conversation 2009-2010 Research Project

Interviews with managers **three months** following their career conversations with employees utilizing the Critical Incident Technique

1. Contextual question:
 - a. Tell me about your experience participating in the career conversation project

2. Helping critical incidents: What helped you to conduct the career conversations? (Appropriate follow-up probes will be asked to ensure clarity.) For each helping critical incident, the participant will be asked in what way that incident helped them conduct the career conversations (importance/outcome), and to provide an example. Format for collecting the data will be:

Helpful Factor & What it Means to Participant (What do you mean by ..?)	Importance (How did it help? Tell me what it was about ..that you found so helpful.)	Example (What led up to it? Incident. Outcome of incident.)

3. Hindering critical incidents: What was not helpful to you in conducting the career conversations? (Appropriate follow-up probes will be asked to ensure clarity.) For each hindering critical incident, the participant will be asked in what way that incident hindered their ability to conduct the career conversations (importance/ outcome), and to provide an example.

Hindering Factor & What it Means to Participant (What do you mean by ..?)	Importance (How did it hinder? Tell me what it was about ..that you found so helpful.)	Example (What led up to it? Incident. Outcome of incident.)

4. Wish list items: Were there things that would have been helpful to you in conducting the career conversations but weren't available to you? (Appropriate follow-up probes will be asked to ensure clarity.) For each wish list item, the participant will be asked in what way that incident might have helped their ability to conduct the career conversations (importance/outcome), and to provide an example of when it might have helped.

Wish List Item& What it Means to Participant (What do you mean by ..?)	Importance (How would it have helped?Tell me what it isabout ..that you would find so helpful.)	Example (In what situation might it have helped? What led up to it?Incident. Outcome of incident.)

5. Demographics:
- a. Level of manager (lower, middle, upper, owner, or other – participant to specify)
 - b. How long have you been in your current position?
 - c. What is your profession (e.g., Accountant, HR professional, etc.)
 - d. Number of employees reporting to you
 - e. Industry in which you are currently working
 - f. Number of employees in the organization (1 – 499)
 - g. Gender
 - h. Age
 - i. Geographic location

APPENDIX D

Managers' Six-Month Follow-Up Interview Guide Career Conversation 2009-2010 Research Project

Participant #: _____ **Date:** _____

Interview Start Time: _____

This interview is intended to better understand your perspective of the impacts of conducting career conversations. Do you have any questions before we get started?

Contextual Questions:

1. **How many career conversations have you conducted to date?** (Rephrase: within your entire career life, how many career conversations have you conducted?)
2. **How many career conversations have you conducted since the career conversation seminar?** (Rephrase: since the day you received the employee workbooks from the senior investigators of the Career Conversation study, how many career conversations have you conducted?)

Thematic Questions:

1. **Are you continuing to conduct career conversations with your employees?** (Rephrase: are you still conducting career conversations even though they are no longer needed for this research study?)
 - a. **If no, what lead you to stop conducting career conversations?** (Rephrase: what aspects of your situation have led you to decide not to continue to conduct career conversations?)
 - b. **If yes, are there any modifications you would make to the career conversation process for your own situation?** (Rephrase: what changes have you made or do you feel you need to make to the way conducting career conversations was shown at the seminar or in the workbook provided to meet your needs at work with your employees?)
2. **What has the impact been of conducting career conversations?** (Rephrase: what have you noticed that resulted from or has been influenced by you conducting a career conversation(s) with your employee(s)? What effects have there been that you've noticed as a result of conducting career conversations?)

That was the last question for this interview before we review analysis of your last interview. Do you have any questions at this point?

[Review codes and themes of late interview with the participant]

Did you get a chance to review the file before this interview?

[Research Assistant responses appropriately to the managers reply and inquire about his or her thoughts on their interview codes and matched themes.]

We are done the interview now. Do you have any questions?

Thank you for participating. The study is expected to be completed between March and May 2010. Would you like a copy of the study once it is complete? If so, would you like it mailed to you or emailed?

If any questions arise for you after this interview, please feel free to contact me by email at doreen@jacklincreative.com or call me at 604-639-7380, or you're welcome to contact one of the lead investigators, Dr. Bill Borgen and Dr. Vivian Lalande.

APPENDIX E

Employees' First Interview Guide Career Conversation 2009-2010 Research Project

Participant #: _____

Date: _____

Interview Start Time: _____

1. Contextual Component

Preamble: As you know, I am conducting an evaluation of what employees think of a career conversation they have recently participated in with their managers. Now that you have taken part in a career conversation with your manager, I am interested in gaining your perspective on this experience. In particular, I would like to learn about what aspects you thought were particularly helpful to the conversation and what aspects were potentially unhelpful that could be changed to improve the career conversation.

- a. As a way of getting started, perhaps you could tell me a little bit about:
 - Your career needs and goals.
 - Are your career goals and needs being met through this company? If yes, tell me about how they are being met and if no, tell me about possible barriers to achieving your career goals and needs.
 - Tell me a little about your relationship with your manager.
 - Let's talk about past experience you have had engaging in career-related dialogue with managers/supervisors.

2. Critical Incident Component

- a. What do you think helped the career conversation be successful? (Probes: What was the incident/factor? How did it impact you? – e.g.: “Being able to tell your supervisor about your career plans was helpful. How did it help? Can you give me a specific example of how it helped you or the difference it made? How did being able to talk to your supervisor about your career aspirations further your career plans?”).

Helpful Factor & What it Means to Participant (What do you mean by ..?)	Importance (How did it help? Tell me what it was about ... that you find so helpful.)	Example (What led up to it? Incident/factor Outcome of incident/factor.)

- b. Now I would like to ask you about aspects of the career conversation that you think were unhelpful or could be improved upon to make the career conversation more successful and meaningful to you as an employee.

Hindering Factor & What it Means to Participant (What do you mean by ..?)	Importance (How did it hinder? Tell me what it was about ... that you find so unhelpful.)	Example (What led up to it? Incident/factor. Outcome of incident/factor.)

- c. Summarize what has been discussed up to this point with the participant as a transition to the next question:

We've talked about what you consider to be helpful features of the career conversation you had with your manager (name them), and some things that you identified as taking away from the experience, perhaps needing to be worked on (name them). Are there other things in the career conversation experience that would have helped you explore and reach your career goals? (Alternate question: I wonder what else might be helpful to you that was missing from the career conversation experience.)

Wish List Item & What it Means to Participant (What do you mean by ..?)	Importance (How would it help? Tell me what it is about ... that you would find so helpful.)	Example (In what circumstances might this be helpful?)

3. How would you compare the present career conversation experience with your past experiences of career-related conversations?

4. To end the interview, I would like to ask you a few demographic questions such as your age, occupation, number of years in this occupation, etc. This demographic information will be used for descriptive purposes and will inform my interpretation of the data.

Demographics Component

- i. Occupation

- ii. Number of years in this occupation

- iii. Occupation/job level

- iv. Length of time in current job

- v. Industry in which the person works

- vi. Number of years in this industry

- vii. Length of service in this company

- viii. Age

- ix. Sex

- x. Income level (household)

- xi. Country of birth
 - If not Canada, (a) length of time in Canada; and (b) 1st language

- xii. Marital status

- xiii. Family status/parental status

- xiv. Education level

Interview End Time: _____

Length of interview: _____

Interviewer's Name: _____

APPENDIX F

Employees' Six-Month Follow-Up Interview Guide Career Conversation 2009-2010 Research Project

Then the **employee six-month follow-up interviews** will occur (6 months after the CIT interviews and 3 months after the CIT participant cross-checking interview) and include the following components/questions:

1. Ask employees a few new questions to finish off the data collection process, as follows:
 - a. Are you still involved in having career conversations with your manager/supervisor? (Why or why not? What had lead you to stop?)
 - b. What has the impact been of engaging in the career conversations? (What have you noticed that resulted from or has been influenced by you engaging in career conversations? What effects have there been that you've noticed as a result of engaging in career conversations?)
 - c. How many career conversation discussions have you had with your manager to date?
 - d. What are your plans with respect to continuing to engage in career conversations? (Under what conditions would you engage in career conversations?)
 - e. And finally, is there anything further the employee needs from us?
2. Check to see if there are any further questions the employee has before concluding the interview. Then thank the employee for his or her their help and participation and we're done with the interviews.
3. Discussion about how the results will be made available to the participant will be held.

APPENDIX G

Career Conversation Checklist

Expanding Exploration	Skills
General opening interaction	
Clarifying purpose of conversation	
Reviewing and identifying any relevant challenges on Employee Positioning System	
<ul style="list-style-type: none"> • He or she doesn't know where to begin 	
<ul style="list-style-type: none"> • He or she doesn't don't know what options are available to me in this organization 	
<ul style="list-style-type: none"> • He or she doesn't don't know if I have the skills or attributes 	
<ul style="list-style-type: none"> • He or she doesn't don't know if I have the support I need 	
<ul style="list-style-type: none"> • He or she doesn't don't know how to make this happen 	

Discussing Possibilities	Skills
Discuss employee's reactions to EPS	
<ul style="list-style-type: none"> • Understand and normalize feelings such as fear, anxiety, sadness, anger 	
Discuss options connected to the challenges relevant to the employee	
<ul style="list-style-type: none"> • Information giving, referral to employee work book, self disclosure 	
<ul style="list-style-type: none"> • Resources available to employee 	
<ul style="list-style-type: none"> • Job options and possible career paths 	
<ul style="list-style-type: none"> • Personal inventory and skill development 	
<ul style="list-style-type: none"> • Personal and work support networks 	
<ul style="list-style-type: none"> • Chart a plan of action 	

Encouraging Action	Skills
Discussing possible action planning strategies using options to address identified challenges	
Encouraging further contact to discuss challenges associated with implementation action strategies	

Skills Needed to Conduct Career Conversations

Hearing the Employee's Perspective														
Active Listening														
Paraphrasing														
Primary Empathy														
Open Questions														
Clarifying Questions														
Summarizing														
Providing Another Perspective														
Information Giving														
Strength Challenge														
Self-disclosure														
Planning Action														
Goal Setting/ Contracting														

Communication Skills Summary

Listening to the Employee's Perspective

Active Listening	<ul style="list-style-type: none"> • Attending to non-verbal and verbal messages - involves understanding and is not simply hearing.
Paraphrasing	<ul style="list-style-type: none"> • Restating of the content of a message in another way. <ul style="list-style-type: none"> ○ e.g. If I understand you correctly, you're not interested in participating in this project. ○ e.g. So what you're saying is that we don't need to spend time on that part of the arrangement.
Primary Empathy	<ul style="list-style-type: none"> • Reflecting surface feelings along with experiences or behaviours that accompany the feelings. <ul style="list-style-type: none"> ○ e.g. It's upsetting when someone doesn't let you tell your side of the story. ○ e.g. You're feeling disappointed about the results because you never had the chance to properly prepare.
Open Questions	<ul style="list-style-type: none"> • Open-ended statements of inquiry that cannot be responded to with yes or no responses. <ul style="list-style-type: none"> ○ e.g. I would like to hear some of your ideas about how to organize this material. How do you think it should be arranged? ○ e.g. You are certainly clear that this isn't something you want to do. What are some of the reasons for your strong feeling?
Clarifying	<ul style="list-style-type: none"> • Checking understanding of a message by asking to hear it again or asking for more information/details. <ul style="list-style-type: none"> ○ e.g. You said you weren't interested in being a part of this project. I'm wondering how this decision is going to affect your involvement with the other projects. Are you still interested in being part of them? ○ e.g. You haven't said much in the last couple of days. Is something bothering you?
Summarizing	<ul style="list-style-type: none"> • Pulling together several ideas. <ul style="list-style-type: none"> ○ e.g. A number of good points have been made about key issues. Let's take a few moments to go over them and write them on the board. ○ e.g. We seem to be going all over the map this morning. If I understand you correctly, the three major points you are making are . . .

(Continued on next page ...)

Providing Another Perspective

Information Giving	<ul style="list-style-type: none"> • Providing information in a clear, succinct, and non-threatening manner. <ul style="list-style-type: none"> ○ e.g. In answer to your question about the system, we will use the following procedure. . . ○ e.g. I have some information on the new computer system and will give this to you.
Strength Challenge	<ul style="list-style-type: none"> • Building on strengths, what they have been doing to prepare towards reaching their goals. Involves primary empathy and a challenge. • Reflecting to a person ways in which his or her actions may be getting in his or her way. • Includes: empathy, addressing specific issues, and inviting dialogue. Self-disclosure is often included. <ul style="list-style-type: none"> ○ e.g. You said that you would never be able to work with the new system, but I noticed that you only made two errors in the last practice. ○ e.g. You've told me that you can't talk in front of groups. I've noticed, however, that when you're confident in your material you are able to make a strong presentation in front of others.
Self-disclosure	<ul style="list-style-type: none"> • Sharing some of your own experiences to help the employee further understand a topic under discussion; to support the point of view of the person or to suggest another point of view. <ul style="list-style-type: none"> ○ e.g. You feel angry about having to learn this new system. When I first found out about it, I was also upset, but also a bit uncertain about whether I was going to be able for figure it out. I wonder if you're a bit uncertain as well. ○ e.g. I can sure understand your fears about standing in front of groups. I used to tie myself in knots before making a presentation. It helped me when I learned to accept my anxiety rather than fighting it - if that makes any sense to you.

Planning Action

Goal-setting/Contracting	<ul style="list-style-type: none"> • Helping employees set concrete and achievable goals, and develop plans for reaching them. <ul style="list-style-type: none"> ○ e.g. O.K. let's see what would be reasonable to attempt to do before we meet again. ○ e.g. Maybe we should discuss who will do what and in what kind of a time frame before our next meeting.
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APPENDIX H

Guidelines for Coding Employees' CIT Interviews

Career Conversation 2009-2010 Research Project

The following guidelines review the process for coding the employee's CIT interview for the career conversation research study using ATLAS-ti software. Beginning with the contextual component of the interview, three phases of coding are conducted. The guidelines start with the first phase which is the most general phase of coding the data extracts. The second phase identifies the specific content shared by the participant that answers the interview questions. The last phase starts to identify the themes across the interviews and begins the process to categorize the data extracts.

1. The first level of coding started by identifying the general layout of the data and how the data would like to be assessed.
 - The contextual section of the employee interview consisted of 4 questions, some of which had multiple parts. From a general perspective, it would be helpful to identify the data as per question and as per participant. Therefore, each *question* and *question by participant* need to be coded. The following code names were used to identify the questions:

Q1 – (Career Needs and Goals)
Short phrase to
identify the
question's topic

- Q1 - (career needs and goals)
- Q2a - (needs and goals being met?)
- Q2b - (needs and goals being met)
- Q2c - (barriers)
- Q3a - (relationship with person doing CC)
- Q3b - (role of person doing CC)
- Q4 - (past experience with dialogue)

The following code names were used to identify each question by participant:

CEE05 – Q1 – (Career needs and goals)
Participant
Code Number

Question
1
Short phrase to
identify the
question's topic

CEE05 – Q1 – (Career needs and goals)
 CEE05 - Q2a – (Needs and goals being met?)
 CEE05 – Q2b – (Needs and goals being met)
 CEE05 – Q2c – (barriers)
 CEE05 – Q3 – (Relationship with person doing cc)
 CEE05 – Q3b – (Role of person doing cc)
 CEE05 – Q4 – (Past experience with dialogue)

- Review each interview and code each question. Each question should be assigned two codes, one as per question and one as per question by participant. Each section of content coded should include the interviewer asking the question and the participant answering the question.
 - Question two has 3 parts and question three has 2 parts. Separate the coding of these questions by using the codes a, b, or c depending on the number of parts. For example, the interviewer in question two asks “Are your career needs and goals being met through this company?” Code the content from the beginning of the interviewer’s question up until the interviewer begins to ask the second part of the question. This content is coded “Q2a – (Career needs and goals being met?)” and “CEE## - Q2a – (Career needs and goals being met?)” The next section of content will then begin with the interviewer asking “If yes tell me how they are being met”. This question and the participant’s response is then coded as “Q2b – (Needs and goals being met)” and “CEE05 – Q2b – (Needs and goals being met)”. The next section of content will begin with the interview asking “If no, tell me about possible barriers to achieving your career needs and goals”. This question and the participant’s response is then coded as “Q2c – (Barriers) and CEE 05 – Q2c – (Barriers).
2. The second phrase requires more attention to the detail of the content. For each question focus into the specific quote that answers the question to each question. If participant states the same answer more than once for the same question, only code it once but try to find the best quote that captures the essence of the answer. Use the following coding sequences for the applicable question:
- Q1 – CEE## - (Career needs and goals)
 - Q2a – CEE## - (Needs and goals being met?)
 - Q2b – CEE## - (Needs and goals being met)
 - Q2c – CEE## - (Barriers)
 - Q3a – CEE## - (Relationship with person doing CC)
 - Q3b – CEE## - (Role of person doing CC)
 - Q4 – CEE## - (Past experience with dialogue)
3. The third phase requires even more attention to the detail of the content. Carefully read the response of the participant to each question. Extract just the portion of the content that indicates the answer to the question. When coding the data, **use the participant’s own words as much as possible when creating the code.** Use the

following code sequence: Q# - CEE## - short phrase. Each question is reviewed separately below for further instructions.

- Question One: Tell me a little bit about your career needs and goals. Identify each “career need and goal” with the code sequence: Q1 – CEE## - short phrase.
- Question Two (a): Are your career needs and goals being met through this company? Identify each response with the following code sequence: Q2a – CEE## - short phrase. Note, if the participant does not answer yes or no, create a short phrase closest to the participant’s own words, such as Q2a – CEE## - I guess so.
- Question Two (b): If yes, tell me how they are being met. Identify each “being met” with the code sequence: Q2b – CEE## - short phrase.
- Question Two (c): If no, tell me about possible barriers to achieving your career goals and needs. Identify each “barrier” with code sequence “Q2c – CEE ## - short phrase”.
- Question Three (a): Tell me a little about your relationship with the person who did the career conversation with you. Identify each “relationship description” with the following coding sequence: Q3a – CEE## - short phrase.
- Question Three (b): Can you also tell me about the role of this person, for e.g. was it your supervisor? Identify each response with the code sequence: Q3b – CEE## - short phrase. Note, if the participant does not answer yes or no, create a short phrase closest to the participant’s own words, such as Q3b – CEE## - I guess so.
- Question Four: Let’s talk about past experience you have had engaging in career-related dialogue with managers/supervisors. Identify any “past experience” response with the following coding sequence: Q4 – CEE## - short phrase.

4. CIT Component:

The interview then moves into the critical incident portion. First, read through, highlight and code all the passages containing helpful critical incidents or factors as “Helping Critical Incident”. This is a first-cut broad-brush way to code all the incidents that are helpful to the participant. **Only highlight a helping critical incident item once, even if it is mentioned several times throughout the interview.** Choose the quote that best captures the essence of the incident or factor. If something is mentioned as a helpful incident or factor and then is mentioned again as a hindering factor, code the incident as “helping” when discussed in that part of the interview, then as “hindering” when discussed in the hindering part of the interview.

5. After identifying all of the helpful critical incidents and coding them as such, they then need to be broken down into more detail as follows:
 - (a) For each “Helping Critical Incident” coded above, create a new code in the Code list using the following protocol: “CEE ## - HE - short phrase” **using the participant’s own words as much as possible to describe the helpful incident.** “CEE ## is the participant number, HE” stands for Helping; and the phrase represents the incident. For instance, if participant number 6 says, “I think a very big key ingredient that has helped me through a lot of the changes is a sense of optimism”, the new code for this would be “CEE 06 - HE – sense of optimism”. Either a single word or a short phrase is acceptable (e.g., support, recognition, close to home, time with family, recognizing my priorities, etc.). Once the code has been created, highlight the appropriate text in the Primary Document and label it with this code. *****Do not use an existing code to label a helping incident, even if one exists that is close to what the participant has said.** This is important for sorting the incidents into categories later in the data analysis. Once the helping critical incident code has been created and the passage labelled, two additional codes need to be created:
 - (b) “Importance: CEE ## - HE - sense of optimism” (where “Importance” denotes the 2nd column in the interview guide; CEE ## stands for the participant number, HE stands for “helping”, and “sense of optimism” is the exact wording used in creating the HE code. See #6 below for why this is important to do.
 - (c) “Example: CEE ## - HE - sense of optimism” (where “Example” denotes the 3rd column in the interview guide; CEE ## stands for the participant number; HE stands for “helping”, and “sense of optimism” is the exact wording used in creating the HE code above). See #6 below for why this is important to do.
6. Review the passages following the new Helping Critical Incident that has been coded in 5(a) above, find the details offered by the participant, and code the details as either “Importance”, “Example”, or both as appropriate, using the codes that you just created in #5 (b) and 5 (c) above. The goal is to have each critical incident accompanied by either an example, or how it is important to the participant, or both. This will form part of the audit trail for ensuring the integrity of the data.
7. As noted in #6 above, every critical incident that has been identified should be associated with an example, or its importance to the participant, or both. **If a critical incident has been identified but no details have been provided that indicate how it is important to the participant (i.e., helps him or her deal well with change), or no example has been given,** create a “Memo” to indicate follow-up is needed with the participant using the following protocol:

With the text requiring follow-up highlighted, create a new memo title: “Part # __ Follow-up __”, where the first __ is filled in with the participant number of the interview being analyzed, and the second __ is filled in with the next sequential number (if it is the first follow-up item to be identified for this participant this

would be 1, if 4 items precede it requiring follow-up for this participant this would be 5, etc.). When completed, it would look like “Part #46 Follow-up 5”. Add the details in the yellow section of the memo once the title has been created to indicate the helping, hindering, or wish list item that needs follow-up, and exactly what you need to know. For example, after highlighting the affected text in the transcript and creating a memo title of “Part #46 Follow-up 5”, the next step is writing in the yellow portion of the memo the details of the issue: “HE – work life balance. Listed as a helpful critical incident; need to find out in what way this is important in helping the participant deal well with change.”

8. Next, the interview moves into the hindering critical incidents or factors. First, go through and label all the passages containing hindering critical incidents or factors as “Hindering Critical Incident”. This is a first-cut broad-brush way to code all the incidents that are hindering to the participant. **Only highlight a critical incident (CI) or wish list item once, even if it is mentioned several times throughout the interview.** Choose the quote that best captures the essence of the incident or factor. If something has already been mentioned as a helping CI, code the item as a hindering factor when it is mentioned as such in the interview. Again, the “importance” and/or “examples” will distinguish the helping aspects from the hindering aspects. The hindering factors then need to be broken down into more detail as per items #5, 6, and 7 above. Follow those same instructions, substituting “HI” for “HE” to denote Hindering.
9. Next, the interview moves into the wish list items. First, go through and label all the passages containing wish list items or factors as “Wish List Item”. This is a first-cut, broad-brush way to code all the incidents or factors that the participant would find helpful in continuing to deal well with change but are not currently available. Once the wish list items have been identified, they need to be broken down into more detail as per items #5, 6, and 7 above. Follow those same instructions, substituting “WL” for “HE or HI” to denote Wish List.
10. The interview then moves on to ask a scaling question (p. 13 of interview guide). Find this section in the primary document, highlight it, and code it as “Scaling question #1”.
11. The final step is to review the primary document to ensure that all of the participant’s responses have been assigned a code. Check that each participant has answered every question. If a question has been missed, highlight the participant’s number at the beginning of the transcript and create a memo stating which question was missed. The question will then be added to the follow-up questions asked in the last interview scheduled in January. Title the memo “CEE ## - Q# - Missed”.
12. If you have any questions about the methodology, create a memo using the “Memo” functionality to flag your question. Title the memo “Methodology Question” to indicate that the question is for the research team to answer, not a participant. Use the following protocol in such situations:

After highlighting the text that you have a question about, create a memo title that looks like this: “Methodology Question #__ - CM##”, where the blank (__) denotes the next sequential number for that particular participant. For example, if this were the first question that has arisen during the data analysis for Participant CEE 05, the memo heading would be, “Methodology Question #1 – CEE 05”. If this were the 6th question that has arisen during the data analysis for Participant #05, the memo heading would be, “Methodology Question #6 – CEE 05”. Add the details in the yellow section of the memo once the title has been created to indicate exactly what you need to know. For example, after highlighting the text in the transcript a memo title of “Methodology Question #3 – CEE 05” might be assigned. In the yellow portion of the memo you then need to add the following information, “How do we capture this information in our coding? Do we even need to capture it?”

APPENDIX I

Employees' Credibility Check by Participant Interview Guide Career Conversation 2009-2010 Research Project

Interviews with employees' 6-months following their CIT interviews (which occur immediately following the cc with managers). Use this for the CIT participant cross-checking credibility check with employees:

1. Use this as an opportunity to conduct the participant cross-checking credibility check for the employees' CIT questions asked immediately following the career conversations with managers. The questions asked would be based on the participants having a chance to review the helping, hindering critical incidents and wish list items extracted from their own interview, then being asked the following:
 - a. These are the critical incidents (CIs) and wish list (WL) items we extracted from your first interview. Do you agree that these are CIs and WL items?
 - b. If no, the participant will be given a chance to discuss his or her perspective on the items, sections of the transcript from which the items were extracted may be reviewed, and consensus arrived at as to whether an item is or is not a CI or WL item. The participant will have the final say – if he or she does not think something is a CI or WL item, it will not be included in the final data.
 - c. If yes, the participant will then be shown the CIs and WL items placed into the categories created from the full data set of all participants. He or she will be asked the following:
 - i. Does the category title make sense?
 - ii. Does the category title reflect the participants' experience of the CI and/or WL items placed in the category?
 - iii. Are the CLs and WL items placed in the correct category?
 - d. If participants agree with the way items have been placed in c (i), (ii), and (iii) above, no further discussion is needed. If they do not agree, participants will be invited to share their perspectives about the category titles and the placement of the items. As above, the participant will have the final say about the category in which a CI or WL item belongs. Input regarding changes to the names of the categories will be taken into account but may or may not be acted upon by the researchers, depending on input received from other participants and the extent of/impact of the proposed wording changes.

APPENDIX J

Guidelines for Coding the Managers' First Interview

2009-2010 Research Project
Career Conversation Seminar Evaluation

The below guidelines reviews the process for coding the first managers' interview to evaluate the career conversation seminar for the career conversation research study using Atlas.ti software. The structure of these guidelines are based on the data analysis guidelines originally created by Dr. Lee Butterfield (2005). Three phases of coding are conducted. The guidelines start with the first phase which is the most general phase of coding the data extracts. The second phase identifies the specific content shared by the participant that answers the interview questions. The last phase, starts to identify the themes across the interviews and begins the process to categorize the data extracts.

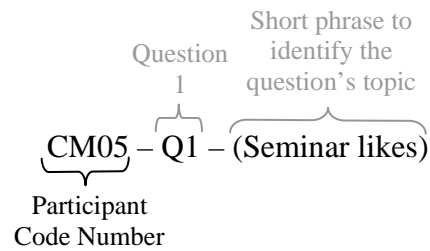
13. The first level of coding started by identifying the general layout of the data and how the data would like to be assessed.

- The first managers' interview consisted of seven questions, some of which had two parts. From a generally perspective, it would be helpful to identify the data as per question and as per participant. Therefore, each *question* and *question by participant* need to be coded. The following code names were used to identify the questions:

Q1 – (Seminar likes)
└───┬──────────┘
Question Short phrase to
1 identify the
question's topic

Q1 – (Seminar likes)
Q2 – (Seminar improvements)
Q3A – (Enhanced aims and objectives?)
Q3B – (Aims and objectives)
Q4A – (Examined challenges?)
Q4B – (Challenges)
Q5A – (Reviewed assets and resources?)
Q5B – (Assets and resources)
Q6A – (Enhanced understanding and abilities?)
Q6B – (Learned by practicing)
Q7A – (Developed action plans?)
Q7B – (Action plans)

The following code names were used to identify each question by participant:



- CM05 – Q1 – (Seminar likes)
- CM05 - Q2 – (Seminar improvements)
- CM05 - Q3A – (Enhanced aims and objectives?)
- CM05 - Q3B – (Aims and objectives)
- CM05 - Q4A – (Examined challenges?)
- CM05 - Q4B – (Challenges)
- CM05 - Q5A – (Reviewed assets and resources?)
- CM05 - Q5B – (Assets and resources)
- CM05 - Q6A – (Enhanced understanding and abilities?)
- CM05 - Q6B – (Learned by practicing)
- CM05 - Q7A – (Developed action plans?)
- CM05 - Q7B – (Action plans)

- Review each interview and code each question. Each question should be assigned two codes, one as per question and one as per question by participant. Each section of content coded should include the interviewer asking the question and the participant answering the question.
 - From question three to seven, there are two parts to the questions. The first one is a yes/no question and the second is an open-ended question. Separate the coding of these questions by using the codes with A or B. For example, the interviewer in question three asks “Did the seminar enhance your understanding of the aims and objectives of career conversations?” Code the content from the beginning of the interviewer’s question up until the interviewer begins to ask the second part of the question. This content is coded “Q3A – (Enhanced aims and objectives?)” and “CM## - Q3A – (Enhanced aims and objectives?)”. The next section of content will then begin with the interviewer asking “Tell me about your understanding of the aims and objectives.” This question and the participant’s response is then coded as “Q3B – (Aims and objectives)” and “CM05 - Q3B – (Aims and objectives)”.
14. The second phrase requires more attention to the detail of the content. For each question focus into the specific quote that answers the question to each question. If participant states the same answer more than once for the same question, only code it

once but try to find the best quote that captures the essence of the answer. Use the following coding sequences for the applicable question:

- Q1 – CM## - (Seminar likes)
- Q2 – CM## - (Seminar improvements)
- Q3A – CM## - (Enhanced aims and objectives?)
- Q3B – CM## - (Aims and objectives)
- Q4A – CM## - (Examined challenges?)
- Q4B – CM## - (Challenges)
- Q5A – CM## - (Reviewed assets and resources?)
- Q5B – CM## - (Assets and resources)
- Q6A – CM## - (Enhanced understanding and abilities?)
- Q6B – CM## - (Learned by practicing)
- Q7A – CM## - (Developed action plans?)
- Q7B – CM## - (Action plans)

15. The third phase requires even more attention to the detail of the content. Carefully read the response of the participant to each question. Extract just the portion of the content that indicates the answer to the question. When coding the data, **use the participant's own words as much as possible when creating the code**. Use the following code sequence: Q# - CM## - short phrase. Each question is reviewed separately below for further instructions.

- Question One: Tell me what you liked about the training seminar. Identify each “like” with the code sequence: Q1 – CM## - short phrase.
- Question Two: Tell me about what could be improved in the training seminar. Identify each “improvement” with the code sequence: Q2 – CM## - short phrase.
- Question Three - A: Did the seminar enhance your understanding of the aims and objectives of career conversations? Identify each response with the following coding sequence: Q3A – CM## - short phrase. Note, if the participant does not answer yes or no, create a short phrase closest to the participant's own words, such as Q3A – CM## - I guess so.
- Question Three – B: Tell me about your understanding of the aims and objectives. Identify each “aim and objective” with the code sequence: Q3B – CM## - short phrase.
- Question Four - A: Did the seminar help you to examine potential challenges to implementing career conversations in your place of work? Identify each response with the following coding sequence: Q4A – CM## - short phrase. Note, if the participant does not answer yes or no, create a short phrase closest to the participant's own words, such as Q4A – CM## - I guess so.

- Question Four – B: Tell me about the challenges you identified. Identify each “challenge” with the code sequence: Q4B – CM## - short phrase.
 - Question Five - A: Did the seminar help you to review your personal assets and the resources you can access in successfully engaging in career conversations with employees? Identify each response with the following coding sequence: Q5A – CM## - short phrase. Note, if the participant does not answer yes or no, create a short phrase closest to the participant’s own words, such as Q5A – CM## - I guess so.
 - Question Five – B: Tell me the assets you identified. Identify each “asset” with the code sequence: Q5B – CM## - short phrase.
 - Question Six - A: Did the seminar enhance your understanding and abilities to conduct career conversations? Identify each response with the following coding sequence: Q6A – CM## - short phrase. Note, if the participant does not answer yes or no, create a short phrase closest to the participant’s own words, such as Q6A – CM## - I guess so.
 - Question Six – B: Tell me what you learned by practicing the conversations in the seminar. Identify each “learned” answer with the code sequence: Q6B – CM## - short phrase.
 - Question Seven - A: Did you develop action plans for addressing challenges in conducting effective career conversations in your place of work? Identify each response with the following coding sequence: Q7A – CM## - short phrase. Note, if the participant does not answer yes or no, create a short phrase closest to the participant’s own words, such as Q7A – CM## - I guess so.
 - Question Seven – B: Tell me about your action plans. Identify each “challenge” with the code sequence: Q7B – CM## - short phrase.
16. The final step is to review the primary document to ensure that all of the participant’s responses have been assigned a code. Check that each participant has answered every question. If a question has been missed, highlight the participant’s number at the beginning of the transcript and create a memo stating which question was missed. The question will then be added to the follow-up questions asked in the last interview scheduled in January. Title the memo “CM## - Question # - Missed”.
17. If you have any questions about the methodology, create a memo using the “Memo” functionality to flag your question. Title the memo “Methodology Question” to indicate that the question is for the research team to answer, not a participant. Use the following protocol in such situations:
- After highlighting the text that you have a question about, create a memo title that looks like this: “Methodology Question #__ - CM##”, where the blank (__) denotes the next sequential number for that particular participant. For example, if

this were the first question that has arisen during the data analysis for Participant CM05, the memo heading would be, “Methodology Question #1 - CM05”. If this were the 6th question that has arisen during the data analysis for Participant #05, the memo heading would be, “Methodology Question #6 - CM05”. Add the details in the yellow section of the memo once the title has been created to indicate exactly what you need to know. For example, after highlighting the text in the transcript a memo title of “Methodology Question #3 - CM05” might be assigned. In the yellow portion of the memo you then need to add the following information, “How do we capture this information in our coding? Do we even need to capture it? She answered that she that she doesn’t know if the seminar helped her.”

18. If anything arises while coding an interview that falls outside these guidelines, contact Doreen Jacklin, Research Assistant, to discuss the situation. She can be reached via e-mail at doreen@jacklincreative.com or by phone at (604) 639-7380.