A PROJECT OF THE

Canadian Research Working Group on Evidence Based Practice
in Career Development

AUTHORS

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ACKNOWLEDGEMENTS

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COORDINATION AND EDITING

Canadian Career Development Foundation (CCDF)

CREDITS

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Handout 1: Objectives of the Orientation

The objectives of the orientation are to:

- Enhance your 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 your understanding and abilities by practicing conducting career conversations,
- Develop action plans for addressing challenges in conducting effective career conversations in your place of work.
### Handout 2: Schedule of Activities

#### Day One

<table>
<thead>
<tr>
<th>Time</th>
<th>Block</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 to 9:50</td>
<td>BLOCK A</td>
<td>Opening Activities</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A.1 Introductions and Expectations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A.2 Setting Norms</td>
</tr>
<tr>
<td>9:50 to 10:15</td>
<td>BLOCK B</td>
<td>Overview, Aims, and Past Experience with Career Conversations</td>
</tr>
<tr>
<td>10:30 to 11:15</td>
<td>BLOCK C</td>
<td>Identifying Challenges to Implementation</td>
</tr>
<tr>
<td>11:15 to 12:00</td>
<td>BLOCK D</td>
<td>Impact of Change on Work Life</td>
</tr>
<tr>
<td>1:00 to 2:30</td>
<td>BLOCK E</td>
<td>Identifying Assets</td>
</tr>
<tr>
<td></td>
<td></td>
<td>E.1 Accomplishments Exercise</td>
</tr>
<tr>
<td>2:30 to 3:15</td>
<td>BLOCK F.1</td>
<td>Skills Needed to Conduct Effective Career Conversations</td>
</tr>
<tr>
<td>3:15 to 4:15</td>
<td>BLOCK F.2</td>
<td>Communication skill practice</td>
</tr>
<tr>
<td>4:15 to 4:30</td>
<td>BLOCK F.3</td>
<td>Closure</td>
</tr>
</tbody>
</table>

#### Day Two

<table>
<thead>
<tr>
<th>Time</th>
<th>Block</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 to 9:15</td>
<td></td>
<td>Review / Preview</td>
</tr>
<tr>
<td>9:15 to 10:15</td>
<td>BLOCK G.1</td>
<td>The Utility of Career Conversations</td>
</tr>
<tr>
<td>10:30 to 12:00</td>
<td>BLOCK G.2</td>
<td>Demonstration and Practice of Career Conversations</td>
</tr>
<tr>
<td>1:00 to 2:30</td>
<td>BLOCK H</td>
<td>Options for Addressing Challenges to Implementation</td>
</tr>
<tr>
<td>2:45 to 4:00</td>
<td>BLOCK I.1</td>
<td>Action Plans</td>
</tr>
<tr>
<td>4:00 to 4:30</td>
<td>BLOCK I.2</td>
<td>Closure</td>
</tr>
</tbody>
</table>
HANDOUT 3: WHAT IS A CAREER CONVERSATION?

A career conversation is simply a discussion between an employee and his or her manager that supports the employee in developing career goals and an action plan for achieving these goals. This conversation will not always result in a specific decision or plan right away, but will set the stage for an employee to later clarify goals and set plans. Employees and managers may have a number of career conversations over a period of time. The employee often navigates toward other jobs or work opportunities in the same organization as a result of the career conversation. This result is beneficial for both the employee and the employer. The employee can acquire more meaningful work, be promoted, find better work/life balance, or feel more personal/professional fulfillment. The employer can retain their more satisfied workers and adapt more easily to changing business goals.

The employee’s career goals are informed by his or her personal needs and characteristics, as well as the business needs and strategic plan of the employer. As employees set career goals, certain training options may be identified that will provide the skills needed to achieve these goals.

A career conversation is usually one hour long and may lead to follow-up conversations. Both the employee and the manager need to do some preparation before the conversation occurs. During the conversation open communication is critical and often flows though a natural process that is outlined in the diagram on handout 5.
HANDOUT 4: PURPOSES AND TOPICS OF CAREER CONVERSATIONS

NOT A CAREER CONVERSATION...

I’m not allowed to discuss the company politics that could blow your projects and career into smithereens.

And I can’t talk about the company’s new business plan or how our reorganization will affect you.

My intent in this conversation is to tell you what you are doing wrong until something good happens.

Main Purpose of Career Conversations:
To facilitate the development of specific goals and a plan for employee development that is mutually beneficial to the employee and the organization.
CAREER CONVERSATION TOPICS

SHARING OF INFORMATION:

Information related to career management
Types of relevant information (about employee or company):

Employee skills and performance
Relevant skills and past performance:

Job and career path options within workplace
Possible career path options:

Training options

Mentorship opportunities
People who may be suitable as mentors:

ACTIVITIES:

Career goal setting (Initial goals)

Development of action plan (Progress toward setting a plan)
HANDOUT 5: THE POSSIBLE OUTCOME OF CAREER CONVERSATIONS

A PROCESS OF ALIGNMENT

Notes

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________
HANDBOUT 6: THE CAREER CONVERSATION PROCESS

THE MANAGER

Encouraging Action
Discussing Possibilities
Expending Exploration

THE EMPLOYEE

Action Planning
Discussing Possibilities
This is my story

Adapted from Borgen (2001)
HANDOUT 7:  
THE STRUCTURE OF THE CAREER CONVERSATION

Expanding Exploration

✔ General Opening Interaction

✔ Clarifying the Purpose of the Conversation

✔ Reviewing the Challenges on the Employee Positioning System

Discussing Possibilities

✔ Discussing the Employees’ Reactions to Reviewing the EPS

✔ Discussing the Options Connected with the Challenge or Challenges Relevant to the Employee

Encouraging Action

✔ Discussing Possible Action Planning Strategies Using Options to Address Identified Challenges

✔ Encouraging Further Contact to Discuss Challenges with Implementing Action Strategies
HANDOUT 8: CAREER CONVERSATIONS: EMPLOYEE POSITIONING SYSTEM (EPS)

CAREER ADVANCEMENT WITHIN THE WORKPLACE

Challenge 1
I don’t know where to begin

Option 1
Resources

Challenge 2
I don’t know what options are available to me in this organization

Option 2
Job options and possible career paths

Challenge 3
I don’t know if I have the skills and attributes for options

Option 3
- Personal Inventory
- Skill Development

Challenge 4
I don’t know if I have support to do this

Option 4
Network: professional and personal

Challenge 5
I don’t know how to make this happen

Option 5
Charting a Plan of Action
HANDOUT 9: CAREER CONVERSATIONS: CHALLENGES AND OPTIONS

CHALLENGE 1
I am unsure of employees’ expectations regarding Career Conversations

OPTION 1
Communicate within your organization

CHALLENGE 2
I have difficulty communicating with unmotivated employees

OPTION 2
Outline the Aims, Processes and Benefits of Career Conversations

CHALLENGE 3
I have difficulty initiating discussions with employees

OPTION 3
Explore Strategies

CHALLENGE 4
I have difficulty discussing new perspectives with employees

OPTION 4
Reframing Approaches and Skills

CHALLENGE 5
I have difficulty helping employees engage in effective action planning

OPTION 5
Action Planning Skills and Strategies

GREATER ALIGNMENT OF PERSPECTIVES, ACTIONS AND GOALS
Handout 10: Impact of Change on Work Life

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## Handout 11: What Helped and Hindered Workers Who Were Doing Well with Changes That Affected Their Work...

<table>
<thead>
<tr>
<th>CIT Category (% Part.)</th>
<th>HE</th>
<th>HI</th>
<th>WL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support – Friends &amp; Family</td>
<td>80</td>
<td>16</td>
<td>16</td>
</tr>
<tr>
<td>Personal Attitudes /Traits / Emotions</td>
<td>76</td>
<td>38</td>
<td>-</td>
</tr>
<tr>
<td>Self-care</td>
<td>64</td>
<td>20</td>
<td>33</td>
</tr>
<tr>
<td>Internal Framework / Boundaries</td>
<td>60</td>
<td>-</td>
<td>7</td>
</tr>
<tr>
<td>Taking Action</td>
<td>51</td>
<td>2</td>
<td>11</td>
</tr>
<tr>
<td>Management Style / Work Environment</td>
<td>42</td>
<td>71</td>
<td>69</td>
</tr>
<tr>
<td>Support – Professionals</td>
<td>33</td>
<td>7</td>
<td>16</td>
</tr>
<tr>
<td>Support – Work Colleagues</td>
<td>33</td>
<td>16</td>
<td>-</td>
</tr>
<tr>
<td>Skill /Role Competence</td>
<td>29</td>
<td>2</td>
<td>20</td>
</tr>
<tr>
<td>Personal Life Issues / Changes</td>
<td>13</td>
<td>42</td>
<td>29</td>
</tr>
</tbody>
</table>

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HANDOUT 12: PORTFOLIO OF ASSETS
HANDOUT 13: INVESTIGATIVE REPORTING FOR ASSETS

Think back to a specific time when you did something about which you felt really good. With this in mind, answer the following questions:

1. What was the experience that you felt good about? How were you involved? What did you achieve?

2. What skills did you use?

3. If someone were watching, what would they say about how you did it (e.g. quickly, carefully, cheerfully, etc.)?

4. What did you like or dislike about what you were doing?

5. How did you get along with others?

(Continued on next page ... )
**HANDOUT 13 (CONTINUED): INVESTIGATIVE REPORTING FOR ASSETS**

Now that you have had a chance to think about a specific time when you did something that you felt really good about, take the information from the previous page and summarize your assets next to each of the following categories.

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>MY ASSETS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SKILLS</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>INTERESTS</strong></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PERSONAL CHARACTERISTICS</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>VALUES</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>OTHER SKILLS</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Handout 14: Skills Needed to Conduct Career Conversations

<table>
<thead>
<tr>
<th>Hearing the Employee’s Perspective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Listening</td>
</tr>
<tr>
<td>Paraphrasing</td>
</tr>
<tr>
<td>Primary Empathy</td>
</tr>
<tr>
<td>Open Questions</td>
</tr>
<tr>
<td>Clarifying Questions</td>
</tr>
<tr>
<td>Summarizing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Providing Another Perspective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information Giving</td>
</tr>
<tr>
<td>Strength Challenge</td>
</tr>
<tr>
<td>Self-disclosure</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Planning Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal Setting / Contracting</td>
</tr>
</tbody>
</table>
# Handout 15: Communication Skills Summary

## Listening to the Employee's Perspective

<table>
<thead>
<tr>
<th>Skill</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
</table>
| **Active Listening** | Attending to non-verbal and verbal messages - involves understanding and is not simply hearing. | 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. |
| **Paraphrasing** | Restating the content of a message in another way. | 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. |
| **Primary Empathy** | Reflecting surface feelings along with experiences or behaviours that accompany the feelings. | 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? |
| **Open Questions** | Open-ended statements of inquiry that cannot be responded to with yes or no responses. | 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? |
| **Clarifying** | Checking understanding of a message by asking to hear it again or asking for more information/details. | 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... |
| **Summarizing** | Pulling together several ideas. |  
  
|
### Providing Another Perspective

<table>
<thead>
<tr>
<th>Information Giving</th>
<th>Providing information in a clear, succinct, and non-threatening manner.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• e.g. In answer to your question about the system, we will use the following procedure...</td>
<td></td>
</tr>
<tr>
<td>• e.g. I have some information on the new computer system and will give this to you.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strength Challenge</th>
<th>Building on strengths, what they have been doing to prepare towards reaching their goals. Involves primary empathy and a challenge.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Reflecting to a person ways in which his/her actions may be getting in his/her way.</td>
</tr>
<tr>
<td></td>
<td>Includes: empathy, addressing specific issues, and inviting dialogue. Self-disclosure is often included.</td>
</tr>
<tr>
<td>• 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.</td>
<td></td>
</tr>
<tr>
<td>• 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.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Self-disclosure</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 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.</td>
<td></td>
</tr>
<tr>
<td>• 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.</td>
<td></td>
</tr>
</tbody>
</table>

### Planning Action

<table>
<thead>
<tr>
<th>Goal-setting / Contracting</th>
<th>Helping employees set concrete and achievable goals, and develop plans for reaching them.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• e.g. O.K. let’s see what would be reasonable to attempt to do before we meet again.</td>
<td></td>
</tr>
<tr>
<td>• e.g. Maybe we should discuss who will do what and in what kind of a time frame before our next meeting.</td>
<td></td>
</tr>
</tbody>
</table>
### HANDOUT 16: CAREER CONVERSATION CHECKLIST

#### Expanding Exploration
- General opening interaction
- Clarifying purpose of conversation
- Reviewing and identifying any relevant challenges on Employee Positioning System:
  - Employee doesn’t know where to begin
  - Employee doesn’t know what options are available to him or her in this organization
  - Employee doesn’t know if he or she has the skills or attributes
  - Employee doesn’t know if he or she has the support needed
  - Employee doesn’t know how to make this happen

#### Discussing Possibilities
- Discuss employee’s reactions to EPS:
  - Understand and normalize feelings such as fear, anxiety, sadness, and anger
- Discuss options connected to the challenges relevant to the employee:
  - Information giving, referral to employee work book, and self disclosure
  - Resources available to employee
  - Job options and possible career paths
  - Personal inventory and skill development
  - Personal and work support networks
  - Chart a plan of action

#### Encouraging Action
- Discussing possible action planning strategies using options to address identified challenges
- Encouraging further contact to discuss challenges associated with implementation action strategies
- Date of follow-up conversation
HANDOUT 17: PERSONAL ACTION PLAN

You have already determined your starting point (your first issue, the first action you might take). In light of this, chart the plan of action you must take in order to move towards implementation.

YOUR PLAN OF ACTION

How will you reach it? e.g.
What will you have to do?
Who can help?
When?

How much time do you need?

What potential obstacles do you see ahead as you move to your first stopover?

What strategies can you put into place to ensure that you will be successful?
Don’t forget your assets.
HANDOUT 18: SAMPLE ACTION PLAN

MY ACTION PLAN

Name ____________________________

Date ____________________________

Action Plan prepared with ____________________________

IDENTIFIED NEEDS

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

GOALS (Short and long term)

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
MY ACTION PLAN

ACTION PLAN

FOLLOW-UP SUPPORT (To be used if you get stuck)
Workshop Objectives

- Enhance your 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 your understanding and abilities by practicing conducting career conversations;
- Develop action plans for addressing challenges in conducting effective career conversations in your place of work.

Workshop Assessment Instructions

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

1. Decide on whether the characteristic in question is acceptable or unacceptable, then

2. Assign the appropriate rating:
   - (0) Unacceptable
   - (1) Not really acceptable, but almost there
   - (2) Minimally acceptable (but still OK)
   - (3) Somewhere between acceptable and exceptional
   - (4) Exceptional

Example

<table>
<thead>
<tr>
<th></th>
<th>Unacceptable</th>
<th>Acceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Example ratings:

- Unacceptable: 0
- Not really acceptable, but almost there: 1
- Minimally acceptable (but still OK): 2
- Somewhere between acceptable and exceptional: 3
- Exceptional: 4

Date
Compare your knowledge BEFORE and AFTER the workshop.

**REGARDING THE WORKSHOP OBJECTIVES**, and knowing what you know now, how would you rate yourself before the workshop, and how would you rate yourself now?

<table>
<thead>
<tr>
<th>BEFORE WORKSHOP</th>
<th>AFTER WORKSHOP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unacceptable</td>
<td>Unacceptable</td>
</tr>
<tr>
<td>Acceptable</td>
<td>Acceptable</td>
</tr>
<tr>
<td>0 1 2 3 4</td>
<td>0 1 2 3 4</td>
</tr>
</tbody>
</table>

- **Clear understanding of the aims and objectives of career conversations**
  - BEFORE: 0 1 2 3 4
  - AFTER: 0 1 2 3 4

- **Knowledge regarding potential challenges to implementing career conversations in my workplace**
  - BEFORE: 0 1 2 3 4
  - AFTER: 0 1 2 3 4

- **Knowledge about your personal assets and the resources you can access in successfully engaging in career conversations with employees**
  - BEFORE: 0 1 2 3 4
  - AFTER: 0 1 2 3 4

- **Clear understanding of how to conduct career conversations**
  - BEFORE: 0 1 2 3 4
  - AFTER: 0 1 2 3 4

- **Developed action plan for addressing challenges in conducting effective career conversations in your place of work**
  - BEFORE: 0 1 2 3 4
  - AFTER: 0 1 2 3 4

**GENERALLY WORKSHOP EXPERIENCE**

<table>
<thead>
<tr>
<th>Unacceptable</th>
<th>Acceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 1 2 3 4</td>
<td>0 1 2 3 4</td>
</tr>
</tbody>
</table>

- **How useful did you find the workshop?**
  - BEFORE: 0 1 2 3 4

- **How would you rate the workshop facilitation?**
  - BEFORE: 0 1 2 3 4

- **How would you rate the workshop facilities (room, etc.)?**
  - BEFORE: 0 1 2 3 4

- **How would you rate the food?**
  - BEFORE: 0 1 2 3 4
## Learning Assessment Instructions

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

<table>
<thead>
<tr>
<th>Scale</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Negligible</td>
</tr>
<tr>
<td>1</td>
<td>Inadequate</td>
</tr>
<tr>
<td>2</td>
<td>Useful</td>
</tr>
<tr>
<td>3</td>
<td>Very useful</td>
</tr>
<tr>
<td>4</td>
<td>Outstanding</td>
</tr>
</tbody>
</table>

### Example

<table>
<thead>
<tr>
<th>Scale</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Unacceptable</td>
</tr>
<tr>
<td>1</td>
<td>Acceptable</td>
</tr>
</tbody>
</table>

### Workshop Topics

- Challenges associated with implementing a career conversation and options for overcoming challenges
- The impact of changes on individual’s work life
- How to identify personal assets
- Communication skills for career conversations
- Demonstration and practice of career conversations
- Resources to meet employee career planning challenges
- Setting Action plans
What were the 3 best features of this workshop for you? 

1. 

2. 

3. 

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

1. 

2. 

3. 

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

__________________________________________________________________________

__________________________________________________________________________

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__________________________________________________________________________

Thank you for taking the time to participate and for completing this evaluation form.