



GSETA 2018 Conference

From Case Manager to Coach

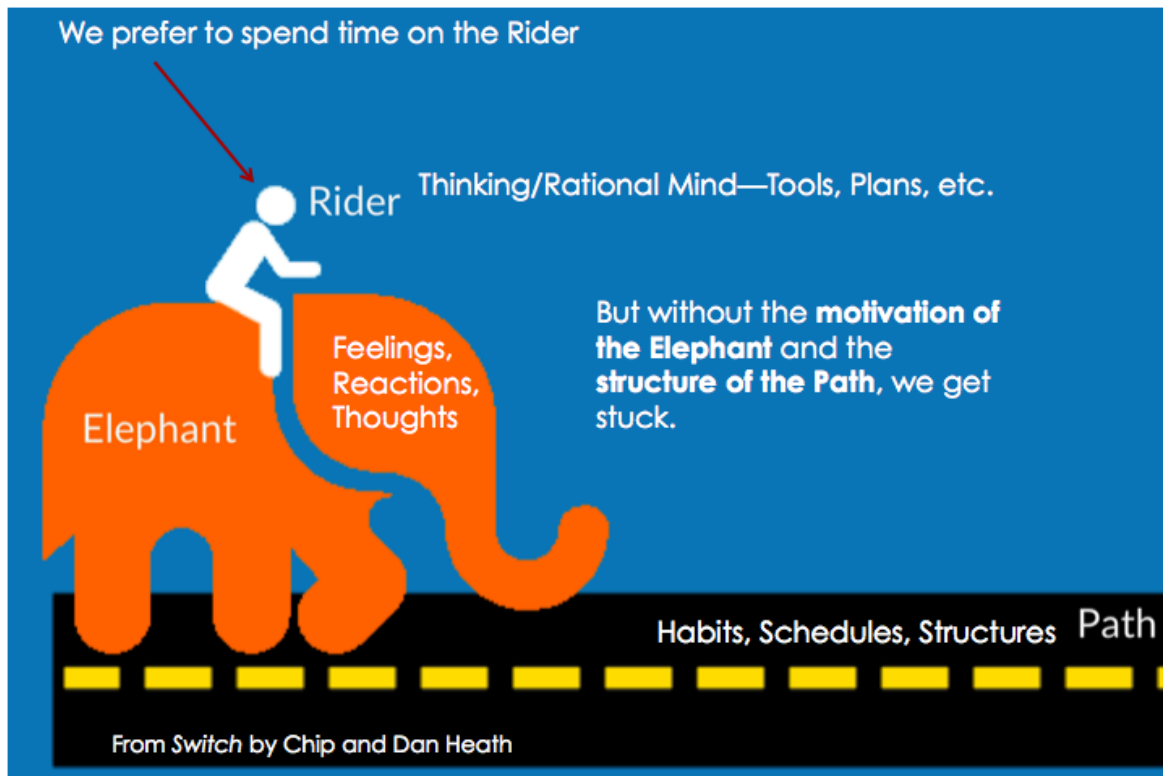
Presented by Michele Martin, CDFI

michelemmartin@gmail.com

The Case Management Approach	The Coaching Approach
Case Loads --Emphasis on numbers.	Individual Customers --Individual people with unique needs
Managing Customers --Staff as "expert" or advice giver.	Helping Customers Take Action --Staff as catalyst and facilitator for effective, committed action on part of customer.
Standardization --There's a "process" that all customers are expected to move through at a similar pace.	Customization --Meet the client where he/she is.
Diagnosis and Treatment --What is "wrong" with the customer? What "treatment" do they need to overcome barriers? (Creates over-reliance on staff to tell them what to do)	Assets and Results --What is right with the customer that he/she can build on? What results does the customer want to create and how can he/she create these results?
Tell --Focus on telling customers what to do; creates the "obstinacy of no"	Ask --Uses questions to help customers determine own goals, actions, commitment

If you're doing all the talking, documenting, and activity then you're not coaching!

The Rider, the Elephant and the Path



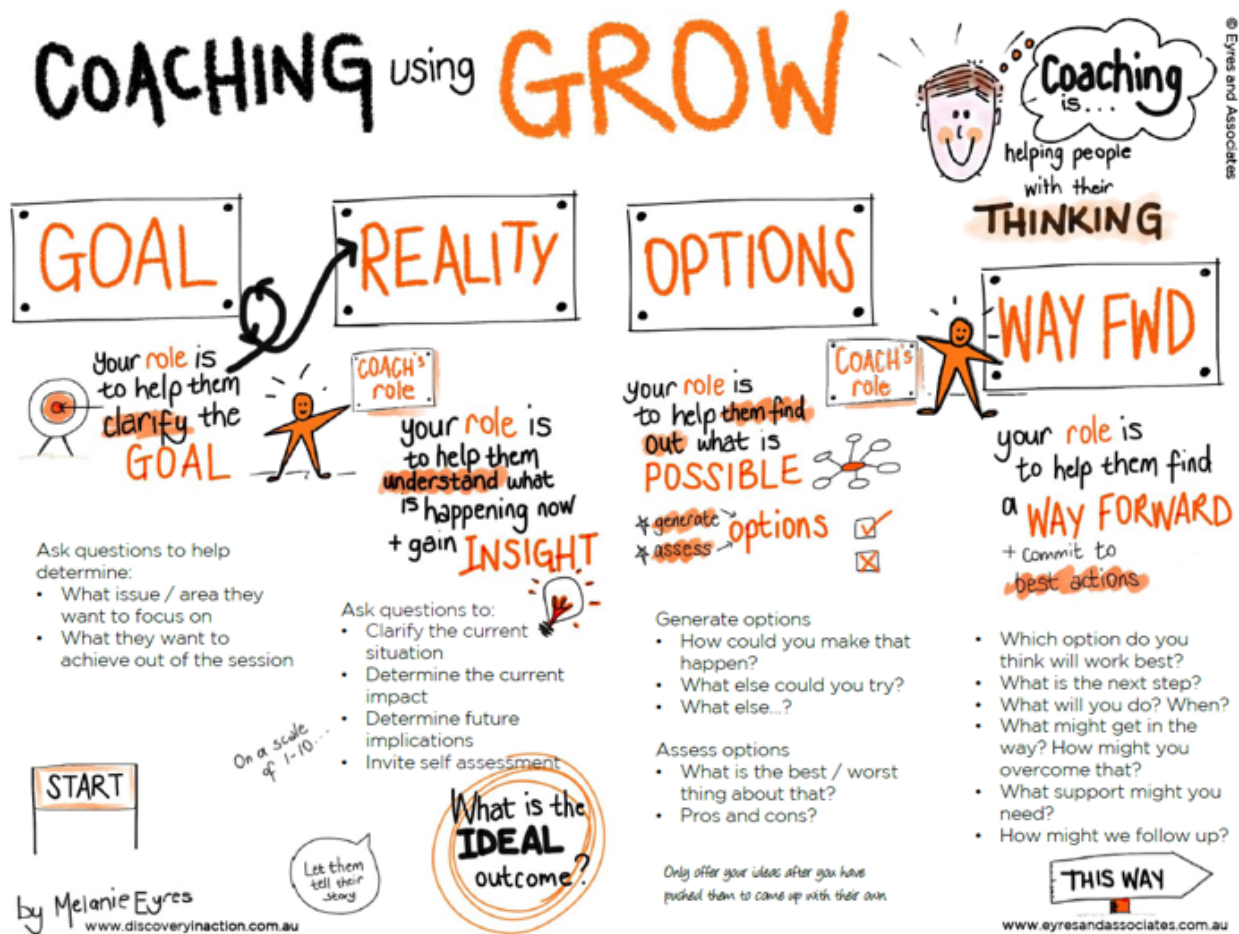
Coaches help job seekers to . . .

- **Direct the Rider--*What direction should we move in?***
 - Plans
 - Tools
- **Motivate the Elephant--*How are emotions/thinking impacting the process?***
 - Develop trust
 - Create safe space-- “judgment-free” zone
 - Address emotional/thinking issues
 - Support intrinsic motivation and action
- **Structure the Path--*How can we create systems to support action?***
 - What habits do they need to create?
 - What structures do they need to organize/make sense of things?
 - How can you they hold themselves accountable for goals/actions?

Pay attention to all 3 areas!

More education about tools/plans won't resolve Elephant & Path problems.

The GROW Coaching Model



Small Changes You Can Make Today

- **Ask questions about process**-- "What have you tried so far? What happened? What else have you tried?" or "When you think about taking that action, what thoughts go through your mind? How do you feel?"
- **Offer advice as a question**-- "Have you tried . . .?" or "What if you tried . . . ?"
- **Focus on strengths**--"What is going well that you can do MORE of?"
- **Reflection**--"What did you learn from this experience that could apply to the future?" "Let's review what you committed to last week and see what progress you made."
- **Committed Action**--"What can you commit to doing before we meet again? Let's write down your plan and put the dates in your calendar for when you'll do these things."
- **Practice clarifying**-- "It sounds like you're not sure about which option to choose? Is that correct?"
- **Focus job seekers on "small wins"**-- "What went well for you today? What did you learn? How could you take what you learned today into tomorrow?"