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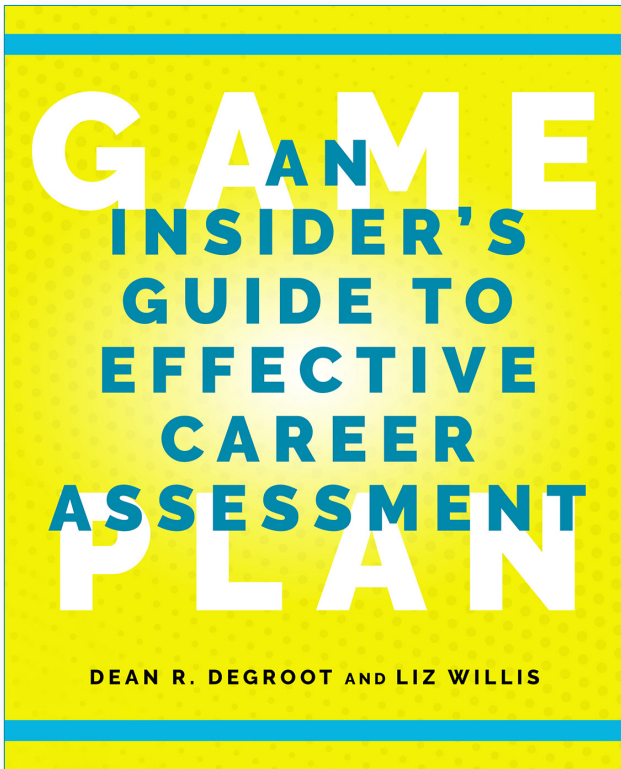
- Table of Contents
- Foreword by Bruce Roselle
- Chapter 1: Specializing in Career Assessment
- Index (compiled by Eve Morey Christiansen)

If you have questions about the book,
feel free to contact the authors.

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—Sandra Krebs Hirsh, principal, Sandra Hirsh Consulting, and co-author (with Jean M. Kummerow) of *LifeTypes: Understand Yourself and Make the Most of Who You Are*



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Dean R. DeGroot, a licensed psychologist and business consultant, has helped individuals and organizations navigate change through career assessment and other services for over thirty years. Dean holds a master's degree in behavioral analysis and therapy from Southern Illinois University and completed postgraduate studies in industrial relations and counseling at the University of Minnesota.



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Contents



<i>Foreword by Bruce Roselle</i>	<i>ix</i>
<i>Preface</i>	<i>xi</i>
<i>Introduction</i>	<i>xiii</i>

PART 1: ASSESSING YOURSELF AND YOUR CAREER

1. Specializing in Career Assessment	3
2. Exploring Your Strengths	10
3. Building Your Network	19

PART 2: ASSESSING YOUR CLIENTS

4. The Career Assessment Process	29
5. The Structured Interview	41
6. Formal Assessments	54
7. Processing Assessment Information	70
8. The Game Plan	78

PART 3: ASSESSING THE WORK ENVIRONMENT

9. Work Values Assessment and Job Satisfaction	95
10. Assessing and Helping Bullied Clients	106
11. Assessment and Job Fit	119

PART 4: CAREER STORIES AND TRANSFORMATIONS

12. Client Case Studies	127
13. Assessment of a Writer by Liz Willis	166
14. A Career Q&A with Dean	181

PART 5: THE QUICK-REFERENCE TOOLKIT

Section 1: Assessment Forms and Strategies	195
Section 2: Exercises to Use with Clients	203
Section 3: Administering Formal Assessments	214
<i>Afterword and Acknowledgments</i>	223

APPENDICES

Appendix A: Glossary	229
Appendix B: Career Assessment Resources	231
Appendix C: The Career Compatibility Scale (CCS): An Invitation to Participate	237
Appendix D: Workplace Bullying: Key Resources	239
Appendix E: Recommended Reading	242
<i>Index</i>	247

FOREWORD

Knowing your game plan is essential to living the life and engaging in the career for which you were designed. However, most people do not take the time to think through this question thoroughly; rather, they just step into the next thing, and then the next thing, and eventually call it a career. Those of us who help people think through their work and life decisions recognize the critical need to have a plan and work it over time. In *Game Plan*, Dean and Liz provide a simple, practical, yet comprehensive formula for helping others create their own powerful, winning career plans. Within these chapters are the detailed steps, structures, and strategies that all career counselors and coaches can use to optimize their results with clients.

Some of our clients suffer from irrational fears and faulty beliefs that have undermined their career thinking in the past. Others are relatively naïve about the world of work and the level of education and experience different types of jobs require. Still others have grown up thinking they can be anything they want to be, regardless of their intelligence, talent, and drive limitations. These issues propelled me years ago to apply assessment tools on the front end of career development and also in my leadership consulting. Though there are schools of thought that encourage clients to explore their own personal narrative and use that to envision their next career move—and I have used these in the past—assessment data that gives clients a realistic picture of how they stack up to norm groups often provides the needed breakthrough. Dean’s assessment process allows for both—clients explore their personal narratives but also find enlightenment and new opportunities through formal career testing.

If you’re new to career counseling and coaching, and especially if you’re new to career assessment, *Game Plan* will speed up your learning process by bringing together a range of tools that would otherwise require much time to source

and learn. Also, because the book is full of stories about actual clients—with their issues, process, and results—you’ll quickly see the rationale behind and efficacy of the tools that are presented. Some of you who are more experienced will have already developed your own versions of these tools, but even experienced practitioners can benefit from the insight and experience reflected in this book. If you’re a leadership consultant like me, for example, you may tend to approach career and leadership conversations from a broad strategic framework, which can come across as too vague and ambiguous for some clients. When that’s the case, you can use the practical tools in this book to augment your work.

In reviewing the book, I especially enjoyed Part 4, Career Stories and Transformations, including the Q&A with Dean. Having known Dean for more than thirty years, I’ve had the pleasure of seeing him grow in experience and model the lessons he shares in the book. I’ve watched him work with clients and colleagues, seen him lead our local career development association, and witnessed the caring, responsible approach he brings to his personal and professional relationships. Most important for this book, I know Dean as an insightful psychologist with deep knowledge of career assessment and its application. By reading *Game Plan*, you stand to learn a lot—about yourself, your colleagues, and the clients you serve.

—Bruce E. Roselle, PhD, LP

Author of *Vital Truths* (2002), *Fearless Leadership* (2006), and *The Fraud Factor* (2016)

February 18, 2021

Chapter 1



SPECIALIZING IN CAREER ASSESSMENT

I've called *Game Plan* an “insider’s guide” for a reason. Career assessment work can be a bit of a mystery. This chapter sheds light on what it’s like to specialize in assessment—that is, to regularly use formal assessment tools like the Myers-Briggs Type Indicator (MBTI) assessment, Strong Interest Inventory assessment, 16PF Questionnaire, and other career assessment instruments as part of your services to clients. That’s followed by guidance on self-assessment for career counselors and coaches (chapter 2) and reaching out to others through networking (chapter 3). Whether or not you decide to specialize in assessment, these chapters will help you get a better sense of your overall strengths and direction.

In this chapter we’ll first look at some of the benefits of specializing in assessment, should you choose to do so. Second, I’ll walk you through several examples of colleagues with whom I collaborate in my work, some of whom have an assessment background but prefer to outsource the work. Finally, we’ll take a look at what it takes to be a “go-to” person for career assessment in terms of knowledge you must have and investments you must make.

If you do decide you want to specialize in assessment, there are two other places in the book where you’ll want to spend some time. First, in chapter 6 I describe the battery of tests I use and also offer tips on how to learn more about assessment instruments, especially if you’re just starting out. Second, in Section 3 of “The Quick-Reference Toolkit” (Part 5 of the book), I walk you through some of the procedures for purchasing and administering assessments, including working with test publishers, reducing your expenses, and recovering costs.

THE BENEFITS OF SPECIALIZING IN ASSESSMENT

Regardless of your field, specialization allows you to get noticed and stand out from the crowd. It's easier to get referrals, because when people think of your name, they automatically think of your expertise. I love being known as the “test guy” in my local market. It's a big part of my brand and a badge of honor for me. When people call me for assessment, I feel I've earned their trust and respect. I take pride in being a trusted professional who can reliably provide value to clients.

Recognition as an expert and development of a clear brand is just one benefit of specializing in assessment. Here are some additional benefits to consider:

- Clients respect and value assessments expertise.
- You'll find consulting opportunities in related areas.
- You'll gain an enhanced understanding of assessment technology.

When you're able to make formal assessments easily available to clients, who expect and value this service, you gain their trust. In addition to asking about credentials, clients frequently ask me about which assessments I offer, how long I've been using them, whether I've been certified, and so on. My knowledge of assessment leads to regular referrals from colleagues. I've also had clients do testing with me and later hire me to do similar testing with their kids.

Once you've mastered some key assessment instruments, you'll find opportunities in outplacement, selection assessment, training and development, and other areas. Most consulting opportunities I've enjoyed have been directly attributable to my ability to offer assessments. These projects can last for years and add significantly to your income. (Consulting engagements tend to be more lucrative than regular client work.) For one project, I provided training services to a leading Minnesota health care provider over a three-year period. Another multi-year project involved doing selection assessment—helping the client hire and promote employees—for a Fortune 500 company.

Finally, when you use assessments frequently in your work, you gain a special knowledge and appreciation for what goes into them and what's required to create them. And this could even inspire you to try creating your own assessment products. I likely never would have created my Career Compatibility Scale (CCS), a work values and job satisfaction assessment tool, without having

knowledge of how career assessments are researched and put together. I discuss the CCS in detail in chapter 9.

WORKING WITH COLLEAGUES WITH COMPLEMENTARY SKILLS

No matter how well equipped we are to provide assessment services, none of us can do it all. In my own case, some of my career counselor or coaching colleagues have experience with formal assessments but want to focus their efforts elsewhere when working with clients, so they may refer clients to me for career assessment only. Others might practice assessment and have subject expertise or competence I lack, so I refer clients to them for both coaching and assessment. Still others don't practice assessment at all but have deep knowledge or competence in a particular area that I lack, such as social media. In those cases, we refer clients to each other for specific services.

For example, my colleagues Pete and George have both referred clients to me. Pete is an executive coach with deep expertise in positive psychology. He occasionally has me do career assessment of his clients so he can focus on coaching them. George, an executive coach who works with individuals over age fifty building encore careers, sometimes refers nonexecutives to me for career assessment. I have occasionally worked with executives but generally prefer working with individual contributors (like technical professionals and project managers), so occasionally I refer clients needing leadership coaching or development to Pete and George.

My colleague Ann happens to love working with clients who are transitioning from the military. This is a specialized area where I feel I am less competent and experienced, so I would refer transitioning vets to her. And because Ann is a licensed psychologist skilled at assessment, she takes care of that, too. Ann might refer clients to me if they fall outside *her* subject expertise.

As a LinkedIn expert and former recruiter, Lonny provides important expertise I lack. While I do help clients gather information they need to prepare strong LinkedIn profiles as part of my assessment process, Lonny is the expert when it comes to the marketing and technical aspects. So I might work with clients on coaching and assessment but send them to Lonny for in-depth help with setting up their LinkedIn profiles and with marketing themselves. Lonny in turn refers clients to me for career coaching and assessment.

I've worked together with Bruce, a psychologist, for over twenty years on a variety of projects, including selection assessment for a Fortune 500 company. In recent years, Bruce has focused his work on leadership development, helping individuals and teams perform at their best. Since much of his time is spent managing his consulting firm, conducting workshops, and traveling for speaking engagements, he sometimes refers clients to me for career counseling and coaching.

For over ten years until she retired, Sandy routinely referred clients to me for career work (interview, assessments, career focus), while she attended to their emotional well-being through her expertise as a therapist. This was an enjoyable, mutually beneficial partnership and one where our complementary skills were put to good use.

There are many more examples too numerous to mention here, but you can start to see the possibilities for collaboration and referrals. These kinds of partnerships are particularly important for those of us who run solo businesses or work in small consulting firms. We can't do it all, and we create win-win relationships and results when we partner with folks who have different niches or areas of expertise.

Special Referrals: Sharing Client Work with Colleagues

When a colleague who's the primary coach or counselor requests my services to do assessment work for the client, we create a collaboration based on our different insights and contributions that can benefit the client.

In a typical collaboration, my colleague will do some kind of interview or needs assessment with the client. They will let the client know what they can or cannot do to help based on the client's request or situation. If they determine that the client might benefit from some kind of assessment (for example, career, IQ, personality) that they either cannot do or do not wish to do, they might then contact me. Of course, before they do that, they will ask the client if they are willing to work with another counselor.

If the client agrees to see me, I'll conduct an initial interview to get a sense of what they are doing with the primary coach or counselor and what I can do for them—a clarification of my role and professional boundaries with respect to their relationship with their primary. Depending on what I discover from this initial inquiry, I might do my whole structured interview (see chapter 5) or an abbreviated version of it. Or I might do some hybrid of that and other

questions, depending on the situation. (Sometimes issues other than career are involved, like major life transitions.) This helps me confirm what kind of assessment is needed.

While this work is going on, the primary coach or counselor and I might talk on the phone and share insights. (We will ensure that the proper releases of information are in order in these cases.) For example, when Sandy sent me clients for career work, she and I would talk about their progress during the engagement.

With this kind of referral, the client usually pays me directly for my part of the service. In some situations (outplacement projects, for example), the primary consultant gets the entire fee but pays the counselor or coach directly for services performed based on time and materials. Often, that's a situation where the client's employer is picking up the tab.

These partnerships are a great source of satisfaction for me. I feel flattered to be called upon to assist, and I know I'm adding value because clients benefit from the wisdom of two different counselors with insights to offer—insights arrived at in different, but complementary, ways. After I'm finished working with a client, the primary counselor and I will often compare notes on themes and characteristics that jumped out at us. It's fun to be able to discover an attribute or piece of information my colleague wasn't aware of, because this information can then be woven into their work with the client. This kind of synergy is very gratifying.

INVESTING IN ASSESSMENT SERVICES AND CAPABILITIES

If you're willing to build solid credentials and have a passion for helping clients find direction, specializing in assessment can be a viable route for you and help you brand yourself and your services. But to be a go-to person in this area, you do need to invest in the necessary training and resources, what I like to think of as an assessment infrastructure. Here are five key strategies to set yourself up as a go-to person for assessment:

1. Establish accounts with reputable test publishers.
2. Know and follow proper standards for test administration.
3. Pursue ongoing training to refresh your skills and stay up to date.

4. Extend your capabilities by networking with colleagues.
5. Commit to improving your overall assessment process.

First, once you create accounts with test publishers and purchase inventory, you can provide your clients with instant access to career assessment tests. Most of the tests I use come from the Myers Briggs Company (formerly CPP), and I have tests already in the system I can administer when needed. It's just a matter of providing the links and passwords to clients. If a colleague sends me a client who needs to take the MBTI assessment, it only takes me a few minutes to get the client set up. For details on how all this works, see Section 3 of "The Quick-Reference Toolkit."

Second, providers of career assessment services are expected to know and follow the correct protocols for administering and interpreting career assessment tests. So once you're up and running, you'll want to adhere to the standards. These are generally set by the publisher and may differ from one test to another. Other guidance comes from state licensing boards and associations like the National Career Development Association (NCDA). For more information, go to the NCDA website, select Standards, and then click on Career Counselor Assessment and Evaluation Competencies.

Third, it's important to pursue training to stay up to date and in demand. As a psychologist in the state of Minnesota, I'm required to complete 40 CEUs every two years. But beyond that, I try to stay current with any new developments that arise, particularly those that relate to the core tests I use. This increases the value I add and gives me continued confidence that I'm providing the best possible service to my clients.

Fourth, be sure to tap into the expertise of your colleagues to extend your own capabilities. My assessment infrastructure includes my network. Having a robust network means I can extend what I offer to clients beyond my own services, and colleagues can do the same by referring clients to me. They add to my own capabilities and know-how by being open to questions and offering their insights on complex assessment situations, such as unusual test patterns or varying test results from multiple instruments. (See chapter 3 for more on networking.)

Finally, strive to continually improve your overall assessment process, which will also include informal assessment techniques such as interviewing and client worksheets. I consider my larger career assessment process—from the

structured interview to the game plan—to be the heart of what I do, and I’m constantly looking for ways to make it better.

REFLECTING ON CHAPTER 1: SPECIALIZING IN CAREER ASSESSMENT

The NCDA lists assessment third in its list of minimum career competencies for career counselors (see ncda.org, Standards). However, the reality is that not all career counselors and coaches choose to focus on assessment. If you haven’t already, consider researching career development professionals in your area to see who’s doing what.

Specialization in formal assessments can lead to opportunities beyond working with individual clients, such as work in selection assessment and outplacement. If you’re not yet familiar with these professional services and what they entail, consider doing some networking and research. (See chapter 3 for tips on networking. Also, see the Glossary in Appendix A for definitions of these services.)

If you are currently working as a career counselor or coach but not yet using career assessment instruments such as the MBTI assessment and Strong Interest Inventory assessment, have you found that clients are asking for these services? If so, you will find lots of ideas in this book on how to get started. If you have clients who are asking for formal assessments but you’d rather *not* conduct that work, to whom might you refer them?

Having a network of colleagues whom you can refer work to, and who can refer work to you, extends your capabilities well beyond what you can offer yourself. What other counselors and coaches could you partner with in order to create a more dynamic experience for the clients you serve? If you are currently a counseling student, ask your fellow students what they think their focus might be.

To be a go-to person for assessment, you need to build certain capabilities, as discussed in the last section of this chapter. If the idea of specializing in assessment is appealing to you, what steps can you start taking now toward that goal? Write them down. Also, consider writing a game plan (see chapter 8).

INDEX

- ABC model in cognitive therapy, 206
- abuse. *See* bullying
- academic professional case study, 146–52
- achievement motivation, 104
- The Achievement Motive* (McClelland), 104
- active listening, 50
- ADHD (attention-deficit/hyperactivity disorder), 141–42
- administration of formal assessments, 8, 67–68, 214–22
- affirmations, positive, 205
- American Society for Training and Development (ASTD), 19, 21
- anxiety
- of clients, 110–11, 187. *See also* bullying
 - of counselors. *See* fear and anxiety of career counselors
- artist case study, 152–56
- Artistic type (Holland Codes), 135, 175, 178
- arts organization fundraiser case study, 74, 156–63
- assessment. *See* career assessment assignments for clients. *See* homework in career assessment process
- Association for Coaching, 233
- Association for Talent Development, 19, 26
- attention-deficit/hyperactivity disorder (ADHD), 141–42
- attitude issues of clients, 62–63, 66, 114–16
- Ballinger, Marcia, 190
- banking industry professional case study, 138–42
- Barclay, Susan, 231
- Barron, Barbara, 102, 233
- behavioral issues of clients, 62–63, 66, 114–16
- Bents, Richard, 19, 95, 96, 237
- biases in formal assessments, 187–88
- bias for action, 12, 38
- Big Five personality traits, 58
- blind spots, 188
- body language, 51, 108, 111

- Bolles, Richard, xi
- Boss theme in Career Compatibility Scale, 98, 104
- brain and effects of bullying, 114, 146
- brand development
 of career counselors, 4, 7, 10
 of clients, 122, 123, 201
- Broadley, Margaret E., 178
- Brown, Brené, 25
- Buckingham, Marcus, 104
- The Bully at Work* (Namie and Namie), 240
- The Bully-Free Workplace* (Namie and Namie), 240
- bullying, xiv, 106–18
 assessments to help clients with, 108–12
 author's experiences with, 112–16
 bully-proofing clients, 116–17
 client story on, 112–13
 defined, 106–7
 examples of, 88
 homework and, 111–12
 “Navigating the Minefield: Bully-Proofing Your Workplace,” 113–14, 241
 reflections on, 117–18
 resources on, 239–41
 sexual orientation and, 188
 software developer case study, 142–46
 statistics on, 107–8
- Burnett, Bill, 12–13
- burnout, 167–69
- Burns, David, 206
- business development professional case study, 138–42
- California Psychological Inventory (CPI 434)
 academic professional case study, 149
 author's experience with, 17
 bullied clients and, 110
 business development professional case study, 140
 for career counselors, 18
 production manager case study, 129
 profile patterns in, 58–59
 publisher of, 215
 sample profiles of, 222
 uses and benefits of, 55
 writer case study, 175
- Callings* (Levoy), 13–14, 112
- Career and Job Compatibility Matrix
 arts organization fundraiser case study, 160–61
 client challenges and, 196
 client variations in completion of, 76
 as homework, 76
 overview, 71, 74
 template, 73, 200
 writer case study, 177
- career assessment
 bullied clients and, 108–12
 challenging situations and tools for, 195–96. *See also* client challenges
 defined, xiii

- examples of use. *See* client case studies; writer, career assessment of
- formal instruments for, 54–69.
See also formal assessments
- game plan creation and, 78–91.
See also game plans
- job fit and, 119–23. *See also* job fit
- processing information from, 70–77. *See also* information processing from assessments
- process of, 29–40. *See also* career assessment process
- Q&A with author on, 181–90.
See also Q&A with author
- resources for, 231–36
- specialization in, 3–9. *See also* specialization in career assessment
- structured interviews for, 41–53. *See also* structured interviews
- worksheets for. *See* worksheets
- work values assessment and job satisfaction, 95–105. *See also* work values assessment
- career assessment forms and strategies, 195–202
- career assessment process, 29–40
of author, 31, 183–84
benefits of, 31–32
client buy-in and, 35–36
client story on, 32–35
homework in, 36–39
key tasks for, 30
reflections on, 39–40
- Career Attitude and Strategies Inventory (CASI), 216
- career coaches. *See* career counselors
- Career Compatibility Scale (CCS)
artist case study, 101–2, 155
bullied clients and, 110
complimentary access to, 237–38
development of, 4–5, 19, 95
group assessments and, 103
introduction to, 96–97
motivation and performance, 104–5
personalized reports from, 100–103
themes of, 98–99, 104–5
- Career Counseling: A Holistic Approach* (Zunker), 236
- Career Counseling: Applied Concepts of Life Planning* (Zunker), 236
- career counselors. *See also* reflections for career counselors
education and training for. *See* education and training of career counselors
experience level of, 67
formal assessments completed by, 68
game plans completed by, 91
informational interview with author for, 181–90
job fit for, 15–16
networking by, 19–26. *See also* networking by career counselors
referrals and collaborations among, 5–7, 12, 24, 65, 186

- self-advocacy of, 60
 self-confidence of, 21, 23, 67, 69
 self-consciousness of, 51–52
 self-reflection of, 180
 specialization in career assessment, 3–9. *See also* specialization in career assessment
 strengths of, 10–18. *See also* strengths of career counselors
 stress management and, 189–90
The Career Counselor's Handbook (Figler and Bolles), xi
Career Development Quarterly (NCDA), 21
 career development theories, 184
The Career Guide for Creative and Unconventional People (Eiklerberry and Pinsky), 178
 Career Ingredients Summary Sheet
 arts organization fundraiser case study, 159–60
 client challenges and, 195
 client story on, 34
 as homework, 76
 job fit and, 121
 production manager case study, 131–32
 template, 72, 199
 use of, 71, 74, 77
 writer case study, 176
 Career Planning Academy, 241
 case studies. *See* client case studies
 CASI (Career Attitude and Strategies Inventory), 216
 CCS. *See* Career Compatibility Scale
 certification in formal assessment
 administration, 67–68, 217–18, 221–22
 change exercise, 204, 211–13
 Circle of Connection exercise, 155, 203, 207–8
 client buy-in, 35–36, 40, 50, 53
 client case studies, xiv, 127–65. *See also* writer, career assessment of
 academic professional, 146–52
 artist, 152–56
 business development professional, 138–42
 fundraiser for arts organization, 74, 156–63
 production manager, 82–84, 88, 128–34
 promotions planner, 134–38
 reflections on, 163–65
 software developer, 142–46
 client challenges, 203–13
 with assessments, 195–96
 behavioral issues, 62–63, 66, 114–16
 change exercise for, 211–13
 Circle of Connection exercise for, 207–8
 client comfort during interviews, 51–52
 feeling stuck, 71, 81
 game plan writing and, 81
 homework completion and, 38–39
 job fit and, 209–11
 Multistoried Life exercise for, 208–9
 positive thinking exercise for, 204–5

- processing assessment information and, 76
- Restructuring Thoughts, Feelings, and Behaviors exercise for, 205–6
- Client-Coach Expectations Agreement, 36–39, 186, 195, 197
- client exercises, 203–13
- on change, comfort with, 211–13
 - on defining an identity, 167, 173–74
 - on job fit, 209–11
 - on life story, 208–9
 - listing of, 203–4
 - on positive thinking, 204–5
 - on restructuring thoughts, feelings, and behaviors, 205–6
 - on time use, 207–8
- client expectations
- client budgets and fees, 49–50, 52, 58, 76
 - client buy-in and, 35–36, 40, 50, 53
- Client-Coach Expectations Agreement, 36–39, 186, 195, 197
- homework completion and, 36–39, 40
 - unrealistic, 186
- Coffman, Curt, 104
- cognitive disabilities, 187
- cognitive therapy, 206
- collaborations among career counselors, 5–7, 12, 65
- A Comprehensive Guide to Career Assessment* (Stoltz and Barclay), xvi, 216, 231–32
- continuing education for career counselors, 8, 241
- Conventional type (Holland Codes), 130, 135, 178
- coping skills
- for career counselors, 189–90
 - for clients, 145, 155
- costs and fees
- client budgets and, 49–50, 52, 58, 76
 - formal assessments and, 7–9, 58, 219–21
 - new or inexperienced career counselors and, 67
 - referrals and, 7
- COVID-19 pandemic, 89–90
- CPI 434. *See* California Psychological Inventory
- credentials for formal assessment administration, 67–68, 217–18, 221–22
- cultural competence, 188–89
- culture of companies, 116
- Defining an Identity exercise, 167, 173–74
- DeGroot, Dean R. *See also* Q&A with author
- bullying, personal perspective on, 112–16
 - colleague collaborations of, 5–6, 19
 - formal assessments, personal use of, 17, 25, 68, 83, 181, 233
 - game plan completed by, 86–88, 89–90
 - networking experiences of, 19–20

- professional association participation of, 21–23
- depression, 110, 138, 141, 187
- Designing Your Life* (Evans and Burnett), 12–13, 14
- diversity, 187–89
- Do What You Are: Discover the Perfect Career for You Through the Secrets of Personality Type* (Tieger, Barron, and Tieger), 64, 102, 179, 231, 233–35
- Do You Fit? exercise, 204, 209–10
- EAPs (employee assistance programs), 107, 116
- EAS (Employee Aptitude Survey), 216
- editor case study. *See* writer, career assessment of
- education and training of career counselors
 - on bullying, 113–14, 241
 - certification in assessment
 - administration, 67–68, 217–18, 221–22
 - continuing education, 8, 241
 - in formal assessment use, 64–65, 68, 221–22
 - mastermind groups and, 23–25
 - mentoring and tutoring, 61–62, 64, 68, 105
 - new or inexperienced career counselors and reduced fees, 67
 - professional organizations and, 20–21
 - resources for self-instruction, 231–36
 - self-development books for, 12–15
- Eikleberry, Carol, 178
- Employee Aptitude Survey (EAS), 216
- employee assistance programs (EAPs), 107, 116
- employer needs, 120–22, 123
- ENFJ (Extraverted, Intuitive, Feeling, Judging), 135
- ENFP (Extraverted, Intuitive, Feeling, Perceiving), 33, 54, 102, 153, 233
- Enterprising type (Holland Codes), 135, 178
- Environment theme in Career Compatibility Scale, 97–98, 99, 104, 105
- The Ethical Practice of Psychology in Organizations* (Lowman), 235
- ethical use of career assessments, 234
- Evans, Dave, 12–13
- exercises to use with clients, 203–13
 - on change, 211–13
 - on defining an identity, 167, 173–74
 - on job fit, 209–11
 - on life story, 208–9
 - listing of, 203–4
 - on positive thinking, 204–5
 - on restructuring thoughts, feelings, and behaviors, 205–6
 - on time use, 207–8

- expectations of clients. *See* client expectations
- experience level of career counselors, 67
- fear and anxiety of career counselors
 first-session jitters, overcoming, 50–52, 53
 networking and, 20, 23, 26
 sharing assessment results with clients, 61, 62, 66
- fear and anxiety of clients, 110–11, 187. *See also* bullying
- “Fear Busters: From Apprehension to Connection” presentation (DeGroot), 20, 26
- Feeling Good: The New Mood Therapy* (Burns), 206
- fees. *See* costs and fees
- Figler, Howard, xi
- FIRO-B assessment. *See* Fundamental Interpersonal Relations Orientation-Behavior assessment
- First, Break All the Rules* (Buckingham and Coffman), 104
- first sessions. *See* structured interviews
- formal assessments, 54–69. *See also specific assessments by name*
 academic professional case study, 148–50
 administration of, 8, 67–68, 214–22
 artist case study, 153–54
 arts organization fundraiser case study, 157–59
 assigning to clients, 59–60
 benefits of, 128, 164, 179, 183
 biases in, 187–88
 bullied clients and, 109–10
 business development professional case study, 139–41
 certification in administration of, 67–68, 217–18, 221–22
 client attitudes on, 60, 62–63, 66
 client story on, 33–34
 controversy over use of, xi–xii, 14
 core battery of, 55–58, 65–66, 220
 cost considerations for, 7–9, 58, 219–21
 criteria for choosing, 65–66
 education and training on, 64–65, 68, 221–22
 feedback process for, 61–63
 online assessment procedures, 218–19
 processing information from, 70–77. *See also* information processing from assessments
 production manager case study, 129–30
 publishers of. *See* publishers of career assessment instruments
- Q&A with author on, 65–68
- reflections on, 68–69
- sharing assessment results with clients, 61, 66, 219
- software developer case study, 144–45
- testing of career counselors, 68

- writer case study, 167, 180
- forms. *See* worksheets
- Fundamental Interpersonal Relations Orientation-Behavior (FIRO-B) assessment
- academic professional case study, 149
 - Affection, Inclusion, and Control factors of, 74
 - artist case study, 154
 - arts organization fundraiser case study, 158
 - bullied clients and, 109
 - cost of, 220
 - production manager case study, 130
 - promotions planner case study, 135
 - publisher of, 215
 - software developer case study, 144
 - uses and benefits of, 56
 - fundraiser for arts organization case study, 74, 156–63
- Futterman, Susan, 240–41
- Gaining Cultural Competence in Career Counseling* (NCDA), 188–89
- game plans, xiv, 78–91
- client challenges and, 196
 - client story on, 34–35
 - cover sheet for, 201
 - helping clients complete, 81–82
 - job fit and, 120–22
 - planned happenstance theory and, 184
 - processing assessment information and, 71, 75–77
 - reflections on, 91–92
 - results of, 87–89
 - samples of, 82–90
 - template, 80, 202
 - writing, 79–80
- Getting More Comfortable with Change exercise, 204, 211–13
- Glassdoor.com, 116
- Gough, Harrison G., 59
- Hansen, Sunny, 235
- Herzberg, Frederick, 103–4
- Hogan Assessment Systems, 21, 24, 216
- Hogan Development Survey, 216
- Hogan Personality Inventory, 216
- Holland Codes, 130, 135, 175, 178.
See also Strong Interest Inventory assessment
- homework in career assessment
- process
 - academic professional case study, 150
 - artist case study, 155
 - arts organization fundraiser case study, 159–62
 - benefits of, 164
 - bullied clients and, 111–12
 - business development professional case study, 141
 - client expectations and, 36–38, 40
 - learning styles and, 38
 - noncompliance and, 38–39
 - processing assessment information and, 34, 76–77

- production manager case study, 131–32
- promotions planner case study, 136–37
- Human Motivation* (McClelland), 104
- human resources departments, 107, 145–46
- hygiene factors in employment, 104. *See also* work environment
- Ibarra, Herminia, 13
- Influence theme in Career Compatibility Scale, 99, 104–5
- informational interviews, 150, 181–90
- information processing from assessments, 70–77
- Career and Job Compatibility Matrix, 73
- Career Ingredients Summary Sheet, 72
- formal assessments and, 61–63
- game plans, moving toward, 75–76
- need for, 71–74
- reflections on, 76–77
- worksheets, completing and discussing, 74–75
- information technology (IT) case study, 138–42
- instructors of career assessment, xv–xvi
- Integrative Life Planning (Hansen), 235
- interpretation of assessment results, 61
- interviews for jobs, 78, 120–22, 150
- interviews with clients. *See* structured interviews
- INTJ (Introverted, Intuitive, Thinking, Judging), 45, 83, 129, 175
- Investigative type (Holland Codes), 130, 178
- ISFJ (Introverted, Sensing, Feeling, Judging), 66
- ISTJ (Introverted, Sensing, Thinking, Judging)
- academic professional case study, 148
- arts organization fundraiser case study, 158
- author’s insights on identifying as, 25, 83, 181, 233
- business development professional case study, 139
- career counselors and, 233
- Jeffers, Susan, 23
- job fit, xiv, 119–23. *See also* Career and Job Compatibility Matrix
- for career counselors, 15–16
- client exercise for determining, 209–11
- client self-descriptions and, 164–65
- co-workers and work environment, 117
- employer needs and, 120–22
- mining assessment for insights on, 119–20
- product of assessments and, 122

- reflections on, 123
- job interviews, 78, 120–22, 150
- job satisfaction. *See* work values assessment
- job search communications, 119–23
- Johnson O'Connor Research Foundation, 178–79
- Kummerow, Jean M., 21, 235
- leadership, 16–17, 18, 21–23, 60
- Learned Optimism* (Seligman), 14, 155, 206
- learning styles of clients, 38
- Leider, Richard, 13, 208
- Levoy, Gregg, 13–14, 112
- LGBTQ clients, 188
- librarian case study. *See* writer, career assessment of
- LinkedIn, 116
- Lowman, Rodney L., 235
- manager case study, 82–84, 88, 128–34
- market research manager case study, 146–52
- mastermind groups, 16, 23–25, 26
- Mausner, Bernard, 104
- MBTI assessment. *See* Myers-Briggs Type Indicator assessment
- McClelland, David, 104
- mentoring and tutoring of career counselors, 61–62, 64, 68, 105
- The Mindful Coach* (Silsbee), 10, 12, 18
- mindset, 155
- Minnesota Career Development Association (MCDA), 20–23, 65
- Minnesota Multiphasic Personality Inventory (MMPI-2), 58–59, 216
- Minnesota Professionals for Psychology Applied to Work (MPPAW), 20–21
- mission of organizations, 99, 101–2
- motivation and performance, 103–5
- The Motivation to Work* (Herzberg, Mausner, and Snyderman), 104
- Motives, Values, Preferences Inventory, 216
- Multistoried Life exercise, 204, 208–9
- Myers-Briggs Company, 215, 217–22
- Myers-Briggs Type Indicator (MBTI) assessment
- academic professional case study, 148
- artist case study, 153
- arts organization fundraiser case study, 158
- author's assessment results, 25, 83, 181, 233
- business development professional case study, 139
- certification in administration of, 67, 217
- client story on, 83
- cost of, 220
- ethical use of, 234
- game plans and, 83
- job fit and, 120–21

- online administration procedures, 218–19
- production manager case study, 129
- promotions planner case study, 135
- sample reports and profiles of, 221
- self-awareness of clients and, 43
- Strong Interest Inventory assessment and, 235
- survey on type distribution among coaches, 233
- use in *Do What You Are*, 64, 102, 233–34
- uses and benefits of, 56
- writer case study, 175
- Namie, Gary and Ruth, 240
- National Career Development Association (NCDA)
- Career Counselor Assessment and Evaluation Competencies, 8, 9
- Career Development Quarterly*, 21
- A Comprehensive Guide to Career Assessment*, xvi, 216, 231–32
- credentials provided by, 68
- Gaining Cultural Competence in Career Counseling*, 188–89
- “Navigating the Minefield: Bully-Proofing Your Workplace” (DeGroot), 113–14, 241
- negative thinking, 203, 204–5, 208
- nepotism, 116
- networking by career counselors, xiv, 19–26
- importance of, 181, 190
- leadership, client story on, 21–23
- mastermind groups, 23–25
- professional associations and, 20–21
- referrals between career counselors, 5–7
- reflections on, 25–26
- stress management and, 189
- networking by clients, 152, 155
- New Directions in Career Planning and the Workplace* (Kummerow), 235
- new or inexperienced career counselors, 67
- The No Asshole Rule* (Sutton), 240
- nonverbal communication, 51, 108, 111
- older employees, 134–38
- online assessments, 218–19
- organizational consulting, 181, 235–36
- organizational development, 103–5
- organizational skills of clients, 142
- Organization theme in Career Compatibility Scale, 99, 104
- outplacement projects, 4, 7, 9, 182–85
- PAR (Professional Assessment Products), 216
- partnerships between career counselors, 5–7, 12, 65. *See also* referrals between career counselors

- Passmore, Jonathan, 232
- Pearson Clinical Assessments, 216
- Peck, M. Scott, 173
- peer coaching groups, 16, 23–25, 26
- People theme in Career Compatibility Scale, 99, 104
- people with disabilities, 187
- Perez, Nathan A., 190
- performance theory, 103–5
- personality types and traits, 58. *See also* Myers-Briggs Type Indicator assessment
- personal stories
 - on bullying, 112–13
 - on burnout, 167–69
 - on leadership, 21–23
- Pinsky, Carrie, 178
- planned happenstance theory (Krumboltz), 184
- positive affirmations, 205
- positive psychology, 46–48, 52
- positive thinking exercise, 203, 204–5
- The Power of Purpose* (Leider), 208
- processing information from assessments. *See* information processing from assessments
- procrastination, 142
- production manager case study, 82–84, 88, 128–34
- productivity, 114, 146
- Professional Assessment Products (PAR), 216
- professional associations, 19, 20–23, 26, 65, 189
- professional development, 67–68
- promotions planner case study, 134–38
- PSI Services, 216
- Psychological Consulting to Management: A Clinician's Perspective* (Tobias), 235
- Psychometrics in Coaching: Using Psychological and Psychometric Tools for Development* (Passmore), 232–33
- publishers of career assessment instruments
 - certification provided by, 67–68
 - listing of, 215–16
 - protocols for administering and interpreting career assessments, 8
 - reputation and trustworthiness of, 64
 - resources for education and support from, 221–22
- Purpose theme in Career Compatibility Scale, 99, 101–2
- Q&A with author, xv, 181–90
 - on approach to working with clients, 183–84
 - on client base and targeted clients, 184–85
 - on diversity in career counseling practice, 187–89
 - on first outplacement position, 182
 - on formal assessments, 65–68
 - reflections on, 190
 - on satisfaction of clients, 186–87

- on specialization in career assessment, 183
 - on starting as career counselor, 181–82
 - on stress, 189
- qualifications for formal assessment administration, 67–68, 217–18, 221–22
- Quick-Reference Toolkit, xv, 191–222
 - assessment forms and strategies, 195–202
 - exercises to use with clients, 203–13
 - formal assessment administration, 214–22
- Rath, Tom, 178
- Realistic type (Holland Codes), 130, 178
- Recognition theme in Career Compatibility Scale, 99, 104–5
- recruiters, 132, 133
- referrals between career counselors, 5–7, 12, 24, 65, 186
- reflections for career counselors
 - on bullying, 117–18
 - on career assessment process, 39–40
 - on client case studies, 163–65
 - on formal assessments, 68–69
 - on game plans, 91–92
 - on job fit, 123
 - on networking, 25–26
 - on processing assessment information, 76–77
 - on Q&A with author, 190
 - on specialization in career assessment, 9
 - on strengths, 17–18
 - on structured interviews, 52–53
 - on work values assessment, 105
 - on writer, career assessment of, 180
- Repacking Your Bags* (Leider and Shapiro), 13, 208
- resources
 - on career assessment, 231–36
 - Career Compatibility Scale, 237–38
 - recommended reading, 242–47
 - for workplace bullying, 239–41
- Restructuring Your Thoughts, Feelings, and Behavior exercise, 203, 205–6
- The Road Less Traveled* (Peck), 173
- role-playing, 150
- Roselle, Bruce, ix
- sample assessment reports and profiles, 221–22
- SDS (Self-Directed Search), 216, 218
- selection assessment, 4, 9, 78, 216
- self-advocacy of counselors, 60
- self-assessment, 11–12
- self-awareness of clients
 - formal assessments and, 65, 128, 179, 183
 - game plan and, 83
 - job fit and, 120

- processing of assessment information and, 74, 77
- structured interview to discover, 43
- self-confidence
- of career counselors, 21, 23, 67, 69
 - of clients, 45–46, 78, 152, 206, 208
- self-consciousness of career counselors, 51–52
- self-development books, 12–15
- Self-Directed Search (SDS), 216, 218
- self-esteem and self-worth of clients, 106, 111, 138, 152
- Seligman, Martin, 14, 47, 155, 206
- sexual orientation, 188
- Shapiro, David, 13, 208
- ShareOn Corporate Leader Resources, 96, 237–38
- Silsbee, Doug, 10
- 16PF Questionnaire
- academic professional case study, 149
 - artist case study, 154
 - arts organization fundraiser case study, 158
 - bullied clients and, 109–10
 - business development professional case study, 140
 - client story on, 34
 - job fit and, 120–21
 - production manager case study, 130
 - promotions planner case study, 136
 - publisher of, 216
 - sample reports and profiles of, 221
 - self-awareness of clients and, 43
 - software developer case study, 144
 - uses and benefits of, 56
 - writer case study, 175
- Snyderman, Barbara Bloch, 104
- Social type (Holland Codes), 178
- software developer case study, 142–46
- specialization in career assessment, xiii–xiv, 3–9. *See also* formal assessments
- benefits of, 4–5
 - colleagues with complementary skills and, 5–7
 - investing in assessment infrastructure, 7–9
 - reflections on, 9
- state licensing boards, 8
- Stoltz, Kevin, 231
- StrengthsFinder 2.0* (Rath), 178–79
- strengths of career counselors, xiv, 10–18
- books for self-development, 12–15
 - leadership styles and, 16–17
 - reflections on, 17–18
 - sweet spot, understanding, 11–12
 - work environment, determining, 15–16
- strengths of clients, 74–75
- stress management
- for career counselors, 189–90
 - for clients, 145, 155

- Strong Interest Inventory assessment
 academic professional case study,
 148
 artist case study, 154
 arts organization fundraiser case
 study, 158
 bullied clients and, 110
 business development profession-
 al case study, 140
 certification in administration of,
 67, 217
 cost of, 220
 MBTI assessment and, 235
 production manager case study,
 130
 promotions planner case study,
 135
 publisher of, 215
 self-awareness of clients and, 43
 software developer case study,
 144
 transgender clients and, 188
 uses and benefits of, 57
 writer case study, 175, 180
- structured interviews, 41–53
 about, 42–43
 academic professional case study,
 147–48
 artist case study, 153
 benefits of, 163–64
 bullied clients and, 108
 business development profession-
 al case study, 139
 client challenges and, 195
 client stories on, 33–34, 44–46
 favorite books and movies ques-
 tion, 48–49
 first-session jitters, overcoming,
 50–52
 job fit and, 120
 leading, 49–50
 positive psychology and, 46–48
 production manager case study,
 128–29
 promotions planner case study,
 134
 questions in, 43–44, 198
 reflections on, 52–53
 software developer case study,
 143
 tips for conducting, 50
 writer case study, 167, 169–73
- support and support groups
 for adult ADHD clients, 141
 for bullied clients, 111–12
 for lonely clients, 136–37
 for stressed clients, 145
- Sutton, Robert, 240
 sweet spot, 11–12
- tardiness, 142
- Task/Challenge theme in Career
 Compatibility Scale, 99, 104–5
- Team theme in Career Compatibil-
 ity Scale, 99
- teamwork, 103
- test publishers. *See* publishers of
 career assessment instruments
- tests. *See* formal assessments
- Thinking More Positively exercise,
 203, 204–5
- Thomas-Kilmann Conflict Mode
 Instrument (TKI assessment),
 215

- thought patterns, 206
- Tieger, Kelly, 102, 233
- Tieger, Paul D., 102, 233
- time use exercises, 155, 203, 207–8
- Tobias, Lester L., 235
- toxic work environments. *See*
bullying
- training of career counselors. *See*
education and training of career
counselors
- transgender clients, 188
- The 20-Minute Networking Meet-
ing* (Ballinger and Perez), 190
- Two-Factor Theory (Herzberg),
103–4
- user manuals for formal assess-
ments, 221–22
- Using Assessment Results for
Career Development* (Zunker),
236
- values awareness, 57. *See also* work
values assessment
- Values Preference Indicator, 57
- Values Scale, 57, 144, 148, 176
- visualization process, 184
- Watson-Glaser Critical Thinking
Appraisal, 215
- WBI (Workplace Bullying Insti-
tute), 107–8, 240–41
- Wechsler Adult Intelligence Scale
(WAIS-III), 216
- When You Work for a Bully* (Fut-
terman), 240–41
- Willis, Liz, 85–86, 88–89, 166. *See
also* writer, career assessment of
work environment, 18, 117, 189.
See also bullying; job fit
Working Identity (Ibarra), 13, 14
work-life balance, 111, 155, 207–8
workplace bullying. *See* bullying
Workplace Bullying Institute
(WBI), 107–8, 240–41
workplace guidelines, 116
worksheets
Career and Job Compatibility
Matrix, 73, 200
Career Ingredients Summary
Sheet, 72, 199
client story on, 34
completing and discussing,
74–75
for game plans, 80, 202
job fit and, 120–22
work values assessment, xiv,
95–105
Career Compatibility Scale intro-
duction, 96–97
Career Compatibility Scale per-
sonalized reports, 100–103
Career Compatibility Scale
themes, 98–99
client story on, 97–98
development of, 4–5
motivation and performance,
103–5
reflections on, 105
writer, career assessment of, xiv,
166–80
book recommendations, 178–79

burnout at previous job, 167–69
change exercise and, 212–13
Defining an Identity exercise
and, 173–74
formal assessment results for,
174–77
game plan and, 85–86, 88–89
reflections on, 180
structured interview questions
for, 169–73
summary of experience, 179

Your Natural Gifts (Broadley), 178
Yudkin, Marcia, 171

Zunker, Vernon G., 236