**Workforce 3One**

**Transcript of Webinar**

**H1-B Ready to Work Long-Term Unemployed   
Subject Matter Expert Webinar Series   
  
How to Motivate the LTU: Behaviors, Attitudes and Active Engagement Strategies to Improve Participant Job Placements**

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ERIC BELLINO: We're going to turn things over to start to our moderator today, Megan Baird, H1-B program manager with the Department of Labor, Division of Strategic Investments. Megan, take it away.

MEGAN BAIRD: Sure. Thank you, and hi, everyone. And on behalf of the Department of Labor, I wanted to thank you for joining us today. This is our last ready to work TA event of the year to help us round out 2015. Don't worry. You'll see us 2016. It's also the end of your first year or just past the end of your first year as a ready to work grantee.

And thanks to you all we've collected data to see what you've accomplished in the first nine months of your grant, and just as a whole as the group you've served almost 2500 participants, which is phenomenal to see a number like that in just nine months of service. About half of those have been enrolled in a training program.

We even have some of you with leaders and credentials awarded, and to date 386 unemployed workers have entered employment. So very exciting numbers for us to see – (inaudible) – to get to see from you all, and we're excited to see the next report to really round out year one and see where we're at now that everyone is up and running.

So I wanted to turn things over now to Tressa Dorsey who is one of your TA coaches. You know her well. She's going to moderate today's session and introduce our next speaker. Tressa?

TRESSA DORSEY: Thank you, Megan. And welcome, everybody, again to H1-B ready to work subject matter expert series. Today's series is going to be focused on behaviors, attitudes, and active engagement strategies to improve participant job placement. As Megan said, I'm Tressa Dorsey. I'm with High Impact Partners, and I'm just one of the many TA coach providers here for the ready to work grants.

Joining me today on the call as well is Erin Cadwallader, which is her new name, and so I just wanted to let you know that she's also part of our TA team, a very critical part. She's also going to be joining us today.

And I would like to move this forward and just again thank everybody for their time this morning and introduce to you somebody who you may have had the pleasure of sitting in her sessions during the national conference, Jodie Sue Kelly with Cygnet Associates. Jodie?

JODIE SUE KELLY: Yeah. Good morning, everyone, and thanks for joining us. So I guess one statement about me in way of introduction and then we're going to go ahead and get started, and that is that I've been in the workforce system for 38 years. I started really fresh out of college and was one of those lucky people who identified what I had a passion for and have stuck in the workforce – been in the workforce system ever since.

So today – moving right into our information, today there are three overall goals for today's session. And that is the first thing that I want to have us look at is to identify those things inside a program that can oftentimes kill motivation. And part of the reason that I want to do this is because I think that it's important for you to be able to go away from this webinar and to be able to do a self-assessment and just figure out where are you on some of these. Hopefully what you'll learn is, oh, wow, we're doing all of that right.

The second goal is or the second segment we're going to talk about practical strategies to motivate and talk about – and I'll show you a couple tools. We're not going to talk about any theory at all. We don't have enough time in an hour.

And then the last thing that I want us to talk about is really how do you reengage slipping motivation. I don't care how great a program is. I don't care how well-trained the staff are within that program, how wonderful the vocational training site is. There are going to be individuals in the program who, for whatever reason, buyer's remorse, things get hard, their motivation is going to start slipping. And what I want us to look at is how do you reengage that. What strategies can you use?

So the next slide is our agenda, and really this agenda is more for your review later. It's a – in essence, a table of contents. So when you download the slide pack, you will know what it is that you have, but I think that this outlines nicely in the correct order what we're going to look at.

So one of the things that we – that happened was we had a very ambitious plan for what we were going to be able to cover in this session, and so we were going to cover behaviors attitude, how to actively engage people. Plus we were going to cover job placement, job retention, and some career advancement techniques. But we quickly saw that – I quickly saw that you would be in a webinar all – the entire day in order to be able to cover that. So what in – what we quickly decided that we would do is split the session so that we'll be doing job placement, retention, career advancement on our next session, which we'll talk about at the end, which I think is scheduled for some time in February.

So as you spend – or as I spend time in programs, and what oftentimes I'm doing is I'm trying to help them solve a problem. I'm oftentimes called in because recruitment numbers aren't there or they're lose – programs are losing people through the process or the placement rate's not high enough or people aren't retaining their job. So oftentimes I go in. I sit in programs, and as I spent time in programs and I'm trying to help them solve whatever this issue is, what I'm always looking for are what are the places in the program where motivation and engagement have been left hanging?

So one of the recommendations that I would have for you is that you want to figure out – you want to track exactly where it is that you have some kind of issue, where it is that you lose people. So sometimes it's that X number of people telephone in because they're interested, and then based on in large part what's said on the phone, they either show or don't show to orientation?

Or is it from orientation they do come in, they hear, and then they don't follow up by actually applying? Or is it that they apply but they don't make it to testing, or they go to testing and then, although they're certainly meet the criteria, they don't end up entering the programs?

In some programs it's they start classroom training, they go for a couple weeks, and then you start to see a downward trend, or they complete training, they have their certificates, they're good to go, and we lose them in between that point and the point that they're ready for job placement or really until they actually find a job.

The thing is – and there are lots of points in that process, but the thing that I'm suggesting to you is that it's important to know exactly where within that program line that we're having difficulty because otherwise what could happen is that you spend a lot of time, you spend a lot of energy implementing solutions that are in search of a problem. And what I think is much more appropriate is to identify solutions that direction are likely to impact the issue that you're facing.

So what I want to do is just run through some very common issues that I see, and these again may or may not be the things that you deal with. But I'll give you six or seven. I didn't count them, but six or seven things that I think are sometimes problematic. And first one up is that sometimes – well, part of the nature of the work that I do while – if there is an orientation session that students would attend, then I'll go sit in on it.

And sometimes I see that it's just – it's boring. Sometimes I find that there is no orientation, and I see that this is an issue. It's – to me it's a real problem because the perception of value that a participant places on the program is directly related to how much the participant actually knows about the program, the outcomes, and the benefits that they would accrue.

People who are more knowledgeable are much more willing to pay the price to get in. So I say they have to be more knowledgeable, but like knowledgeable of what? So even if a program does an orientation and I would suggest does it first, which is where I think ultimately it should be, is you have to examine the content.

So what I'm showing you here is an example of a boring, non-participatory type orientation. This is a talking head. There's a person in front of the room that talked for an hour or talked for a half hour and maybe covers things like ready to work program is built around the comprehensive assessment of long-term unemployed individuals, needs, and skills resulting in customized intervention.

And at that point we totally lost the audience because they have no idea what was just said. What this type of orientation does – and just quick look at the agenda is like tell them pick up a packet in the back of the room. Make sure you fill out the packet. We introduce all the staff. We talk about the mission of the organization, the history of the organization. And I have to tell you it's very curious to me.

I've been in this field for 38 years and – well, 38 years on February 10th – and when I see my family over the holidays, even though I've been in this all this time, just this Thanksgiving I'm sitting around with my family and they say to me, Jodie, what is it that you do again? In 38 years they cannot grasp what it is that I do because it's not so simple like, oh, I'm a nurse. That would be simple.

And my point is if my own family isn't interested enough to learn what it is that I do and what field I work in, then are our customers really concerned about the mission, the history of the organization? It fills time. It doesn't get down to their level. Eligibility requirements, review the calendar of training.

What I want you to see with this is that this type of orientation – I'm sorry. I flipped ahead too soon. Oh, I'm so sorry. I just did this backwards. What that type of orientation does – I'm sorry – is that it assumes that the individuals in the training already understand the value of the services. They're just coming in because they want to hear the steps and they want to hear the process, and I find that that is not true.

So another turn off that I frequently see is the tone of the written materials. And so when you look at the tone, I'm going to give you just a minute to read this as I play a little music for you. So take a second and read those few sentences. So what I want you to see there is and I want you to be especially mindful of is – oh, and by the way, I don't make anything up. I'm really way too lazy. Everything – the things that I show you I collected, being in workforce programs around the country.

So they are things that then I trim down, take out anything that would identify, but these things are actually used. And I will say as an aside, this is written, if you run it through readability. This is actually on a form. It's written at a 13.8 grade level, which is I think oftentimes higher than the reading level of the clients that we serve. But be especially mindful of anything that takes a harsh bureaucratic tone or creates a sort of us against them type atmosphere. I think that it's not productive in terms of motivation.

But I believe another point, another thing that we want to look at is something else that I see and not really – you should hear rain in the background. That's not a weather system coming through your area. Oh, I got to move this. Sorry. But the – I believe that this is another point that we have to look at the words that we choose as we, oh, talk to people. Sorry. I'm using a different computer than what – I had a problem. OK. There they are.

So what I oftentimes see in programs – excuse me – is that I think that our customers, they want to feel good about themselves. They want to feel confident, not insecure. They want to feel self-worth. They don't want to feel embarrassed. Yeah. We use this kind of terminology, and we use it on plans that we write. We use it in our intake process. We use it in orientation. We use it when we sit down and we case manage with clients. We'll say, well, you have some barriers that we're going to need to overcome. And I think that that's the opposite of what we want to do with folks.

And I'll just tell you a very quick story. I was in the state of Pennsylvania, and I was sitting doing an on-site observation to give them recommendations by the end of the week and I sat in on a job club. Job club had a break. During the break I was standing out in the hallway with other classmates, and they had no idea who I was. And I just said, oh, how long have you been coming here?

And this one young woman said – she goes, well, I've been here a really long time. I've been here almost six months, and then letting me in on inside information, she says, but I have multiple barriers to employment. My heart sank because I thought, this is not a woman who woke up in the middle of the night, sat up in the middle of a deep sleep and said to herself, I think I have multiple barriers to employment. That is something that she has heard in the program and that has been addressed to her and now she's adopted it and she's wearing it around her shoulders like a cloak.

And I think that is not productive in terms of maintaining motivation because, again, it leads to all of those kind of negative self-worth negative feelings. So I say we eliminate all of those kind of things. I never say drop out. I say somebody who left school prior to graduation. That is a – it's a situation. It's a circumstance. It's a behavior. It's not a label. Label jars, not people.

And so the next one that I see is that in some programs because they really – they've got to get some people into the program. Maybe it's a new program. Maybe their recruitment hasn't been going so well. So basically, if somebody walks in, they meet eligibility, they can put breath on a mirror, we let them in.

And I think that mistaking eligibility and suitability is another issue that impacts program performance, and it impacts because, when I let people into the program who are not well-matched for the services that we're offering, then engagement and motivation will suffer. And they oftentimes end up being the people who we're trying to reengage, but the person was never really appropriate in the first place because I think we cannot be all things to all people.

But time and time and time again I see people, especially when I talk to case managers and I say, tell me the story of this person, and these are all the people who are no longer participating. When they tell me the story, oftentimes in the story I can hear that this individual had this issue before they were ever let in the program, and so it should have been clear right at intake and eligibility that this was – we were not the appropriate service provider for that person.

So next I think that we lose a big – can lose big numbers here, and that is the number of individuals who – let's say that right now here it is, middle of December, and they are signing up for a training and that training is not going to start until the end of January.

Oftentimes people lose their steam in that gap, in that interim, and so what we've got to do is make sure that when there is a – that there's some period of time between the day that they apply and they are accepted and start to do the training that we have something that's going to keep them busy and keep them feel like they are making forward progress because if they just go home, sit, and wait, then I think that what we end up doing is we have a lot of people who sort of fall off at that point.

The one last thing that I see – and this, again, is not a comprehensive set but that people who complete the training, they get the certification, they graduate, they get whatever they need from the state in order to be able to go to work, and then they start looking for a job. Individuals who complete training look for work, and that period of looking for work becomes extended.

Oftentimes if they don't get a job very quickly, they fall off, and they fall off of our rolls completely because they've sort of given up on the job search part. And because we need placements, we definitely need to keep them much more engaged. And because I probably won't talk about this until the next session, but one of the things that occurs to me is that, if I am contacting customers let's say once a month during the training to do case management, find out how things are going, when they're in job search, they need to be switched back to once a week case management, where possible.

And I recognize with case load sizes sometimes that's difficult, but I can do group job clubs every Monday. I've got to do something to keep people who are looking for work continuing on that path because looking for a job is a lonely occupation, and it's depressing because you oftentimes get rejected.

So now, that's a quick overview of some very common issues that I see, and so that leads us to taking a look at some – trying to have some better strategies. I have no idea what just happened to my camera, but that is very unattractive right where it – but anyway, I'll continue. So let's look at some better program strategies.

So to build motivation engagement you want to go through the program with a fine-tooth comb, and you want to identify opportunities to interject some strategies. And so you're going to go through beginning to end just sort of like I did, looking at what is every single thing that we can do to infuse motivation. So one of the things that I would recommend is you – on that – I just love that song and I was just looking for an opportunity to play it. No. It's that you want to review the documentation. I showed you a more negative one with Star Wars, but you want to make your documentation warm and friendly.

So looking at this and we're excited that you've started the first step to a bright new future and maybe that's a little too hokey for you but – so change it up. We're excited that you've taken the first step to beginning a new career pathway. We'll help you free of charge. But what this says, if you read through it, is that we're happy you're here. We're friendly. We are approachable people. We're like the kind of people that you want to get to know, that you want to spend some time with. And so review your paperwork to make sure that that is – everything that is given to customers is in a happy tone, and notice also this is a 4.8 reading level. So everybody should be able to see it very, very quickly.

One of the things that – another really important strategy I think is for case managers and others to develop a conversational hook – conversational hooks that focus on outcomes. So there are three major concepts in creating these conversational hooks, and they're – they really underlie, again, marketing.

And so need is the first one, and that is a lack of something. It's some unsolved problem from your customer's point of view, and it has to be from your customer's point of view. I can think somebody needs a certificate. I can think somebody needs to get their high school diploma. I can think that somebody needs to do anything. It's not important what I think they need. It's important what they think they need.

So in my illustration here I have a customer, and you can – it's so obvious. I don't know why I even mention it, but he's thirsty. So he's like just crawled across a desert, and he needs something to drink. And so his need is – well, his lack of something is something to drink. His need is being thirsty.

But a feature tells is just a fact. It's a detail. It's a description of your service. It's the process that people have to go through. When we talk about features, this is like bringing in a scientist and having him talk about water. 70 percent of your body is made up of water, and pure water has a neutral PH of seven, neither acidic, nor is it alkaline. But how does that information help the guy who's thirsty?

And the same concept I see is true in workforce that we can talk about on-the-job training. We can talk about all of these kind of things like work experience. We can talk about just so many program components, that we have job search training, that we have vocational training, all of those kind of things, but ultimately those things don't mean anything to our customers because those are features.

So what we want to do is we want to talk about benefits. Benefits are positive results that your clients get as a result of working with you. And so in this case what is the benefit? What is the outcome? It's a drink. And so if somebody comes in and what their issue is that they are feeling like financial insecurity, what they're feeling is that they have a need for more money, what do I have to sell them? Is that this is a program that is going to help make you financially secure and be able to provide money. How you get there with – we have one-week job search training. We have 12 weeks of some kind of customized training. Then we have on-the-job training again is like the scientist. So we want to eliminate that type of dialogue.

So what I'm going to ask you to do – and I'll try to fix my camera during this interim, but are we using – are you using motivational phrasing that excite – that builds excitement, or are you using bureaucratic terminology that customers just simply don't understand? So I've given you seven statements, and what I want you to do – maybe just do it on a side sheet of paper. Do it in your head. Do it whatever works for you.

But read this statement, and then identify is that statement a feature or is that statement a benefit? Is it a feature? Is it just describing something you do, or is it a benefit? Is it an outcome that your customer will accrue if they use your program? So I'll shut up and give you about one minute to do that.

MR. BELLINO: All right. And like Drew typed into the chat room, again, just a reminder that you can certainly go ahead and let us know if you have any questions about that or comments or anything you want to share about what Jodie just covered or anything she's covering today during the main part of the presentation in that chat window. So we will try to answer your questions today and/or we'll talk about how we're going to address that later on in the hour. But want to definitely get your feedback, if you have it. So feel free to go ahead and type that in.

MS. KELLY: And while you're doing that I'm just going to – I'm restarting my camera to see if this will work. Yeah. it just did. So I should be able – OK.

So going on then, the – when you're looking at – I'm sorry – the – our seven items, the first one, we have vocational training in a skill, trade, or occupation, hopefully you saw that that is a feature. That is what we do, and it's we focused. It's all about us. The item two, you can get a GED and tutors to help you move through more quickly, that is about the customer. So that is a benefit. That is an outcome. We can offer you free tuition at some of the area's best schools, benefit.

You can earn some money while you complete your education, benefit. We have placed more than 100 customers in jobs this year, that is a feature. Unless you say and we can make you number 101 or unless you tell me how that's going to help me, it's a feature. Six, we have workshops on job search, career planning that you're required to attend, that's a feature, and also one of the things that I find is when you tell somebody that they have to do something, then that's the very moment that they don't want to do it.

So I would suggest that we never want to say you have to, even if it's something that they would have done on their own. Just being told don't want – that you have to do it builds resistance. With the right training, you can work and get a higher salary than you might be able to earn otherwise, again, that is going to be a benefit. So one of the things that I find is, when I want to motivate, what I've got to do is change the dialogue, change the things that I say so that I am helping them to translate our program features into benefits and outcomes for them.

So the next thing that you want to – might want to think about is picking a theme for your program that all staff use. Everybody gets onto the same page. So you have to look at what is it that you're selling in orientation, in case management appointment, etc. Short-term messages are get a job, get training, get training and a job.

So what we're all about is helping you to get the training to get a job. The problem is then you're positioning yourself as a short-term program because then, when I get a job, game over. It's done. Instead of – and then what I'm doing is I'm expecting a long-term result or a long-term engagement. And if what we want to do is keep people engaged, we got to start selling that from the very, very beginning.

So the bottom four are much better. But self-sufficiency is a long-term message, and it's one I hear sort of about in workforce programs all the time. But self-sufficiency the issue is that most customers have no idea what that means, and as a matter of fact, my experience has been among all of us that are just at this webinar and listening in, all have a different definition of what self-sufficiency is, what we include, what we don't include. So I don't think that that one is going to get us the traction that we would like to have.

Now, build a career pathway and career advancement are good. Those are much better, but my experience there is sometimes that – in some of the demonstration projects that I've worked with, career advancement, a lot of people think that that means that they're going to train to be a boss, and they don't want to be a supervisor. They just want to do their job.

So if you look at the last one, my experience is income improvement and financial stability is the real problem that customers are trying to solve. And so that is to me what our theme should be. So what we're all about is helping you to improve your income, regain the financial stability that you may have lost since they're long-term unemployed, and the way in which we do that is through the use of career pathways.

So if we have a theme, we know a more benefits-oriented way of saying things, then what we want to do is we want to look at orientation, a reengineered orientation that can be lively and participatory. So yeah. And I would probably play that music or the I want to be a millionaire or billionaire, that song. So if you look at this orientation, this is a quick agenda. I will only – whoop. This thing is so sensitive.

Any of the items that are highlighted, the yellow highlights are all engagement involvement. So when they first walk in, instead of a packet at the back of the room, give them some market research, which is basically how did you hear about us? What is it that drew you in?

And I give them a little market research instrument. The get acquainted, my favorite get acquainted activity – everybody can have their own, but one that I think moves our argument along – the one that I like is to ask them – to go around the room, say their first name, and then give us an example of one thing on your bucket list. What is one thing that you would like to do in your lifetime?

And the reason that I like that is – and you'll see – is because in order to get motivation, people have to dream. They have to have a vision of somewhere that they're trying to go, something that they want. And so I'm going to start off that way.

And I'll go over the agenda. Expectations, what is it that you want to know? I can't answer their questions or personalize the orientation unless I know what exactly it is that they need to get out of this session.

So I will have them go around and tell me one thing – question that you have you want to make sure I answer. We're going to talk about, again, what's the overall goal, to increase income, financial security, something to do with money. We're going to look at how it works, and so now I can walk through some of the components, again, using benefits-oriented language.

But I can put together a check sheet, and so the engagement part is every time I talk about something where they think, oh, my gosh, that's something that I want, they can put a checkmark beside it so when they visit with their career coach, they already have a list of those services that were most interesting to them. It takes a team. It's just a very quick little exercise.

If you go online and you look up triangle – just Google this, triangle team building exercise, it's – basically it's a picture of triangles inside of triangles inside of triangles. It's on a sheet of paper, and what I just have people to do is count them. And then I'll let multiple people put them in a little tiny group, three or four people, and have them count how many so that they come up with an individual answer and a group answer.

My experience has been the group answer is always closer to the real answer than the individual answers, and it's because everybody brings a different perspective. They see things that other people don't see. So that is then when I can talk about how there are many different people on our staff, and they all bring, just like this triangle exercise, a different perspective. And so I can review that.

What other success and testimonials and then we're going to do a goal setting activity, which I'm going to go over some examples here in a second. But it's very important I think right up front that we find out what are their dreams because we might need that information fairly quickly to engage or reengage them.

And so this again – this kind of orientation maybe takes – you can do it in a half hour. I've done it one on one. It can be stretched to an hour. It depends on how much you want to put into the – to that orientation. OK. So the underlying assumption under this orientation is that they are checking us out, and they need to be sold. So this is more of a motivational sales type orientation than a let me give you the facts and figures.

OK. Next thing is your goal setting. This is – I think is really important, and it's one of the most underutilized strategies available to us. We need people to dream about how their lives can be different at the conclusion of the program. So I need them to get a picture because the more that they can visualize their goal, the better motivation will be. That's why I like the bucket list because they're working toward something.

So we need to learn their dreams, and we need to learn their goals so that as a case manager I can use those to keep people on track because, if you think about it – think about for us. Losing weight, starting an exercise program, cutting sugar out of your diet, quitting smoking, all of those things are more difficult if you don't have a friend or family member who is constantly encouraging you and keeping you focused on moving forward.

It's those people who remind us why we're doing this. I got a Fitbit last year for Christmas from my husband, and they have entire Facebook groups that are Fitbit users and so that they can all support and share with each other. So the goal is really important for keeping people on track.

Now, we have two different kinds of goals, and the first kind is not powerful at all. It is to get a GED, to get a certificate, to get a job. It's not powerful because they're very easy to give up because, in essence, they're steps that you take to achieve this dream. I don't want a GED for GED's sake. I want a GED for a reason. Is the reason – the reason behind the reason, is it because, as an example, I've been lying my whole life about being a high school graduate and what I want to do is get my high school diploma so that I'm not lying anymore?

I had a young man once who told me that he wanted to get his GED because he wanted to walk across the stage and collect his diploma and let his grandmother sit and watch and that he wanted to give his grandmother this gift. Well, that is much more powerful than just getting a GED or getting a certificate. It's the reason why, and I think that oftentimes clients tell us these things.

And when we say, well, what are your goals, they just feed us exactly what they think that we want to hear. And so if they've heard, oh, this is about getting training, this is about getting a job, they just feed us that back.

What we want really are life goals. We want – life goals are so much more powerful because they answer the question how will my life be different after I'm done with all this. So it's helping them to get this visual picture so that the program is just a step that they take in order to achieve that. So maybe it's own a car. Maybe it's pay of fines.

Maybe it's that somebody who's long-term unemployed had to move back in with their elderly parents, and they really want to be out on their own with their family again. Maybe it's that they can't afford, especially here at Christmastime, to buy their son some things that he wants for Christmas. Those are powerful. Program goals are not.

So basically a goal is a dream unless you take action, and so whatever it is that they want to achieve, now as a career coach I need to translate. So if somebody says, I want to be able to make a better life for my family, it's like now we're going to put together the steps, and that's where we build the program components.

So I'll get into training and I'll get a certificate in a healthcare occupation because – and what I want you to notice is that I am going to tie the steps of the program back to that dream because working in healthcare can enable me to get a steady job, and that will help me to create a good life for my family. So it's – that's where I'm saying that's how you help people to stay on track.

So a little device that I created, it's a tool that you could use. In a program in Erie, Pennsylvania took my idea, and then they actually embellished on it and made it much better. But it's basically I give to the customers a sheet that says it's useful to identify your goals and how you want your life to be once you're working. It helps you stay motivated. So list five ways that your life would be better off or that you would be better off if you were working in a high paying career. And so they list their reasons.

What Erie did – so I want you to picture this is on – there are three on a page, a sheet of paper so that you can cut them and everybody's just getting a third of a sheet of paper. Everybody writes down what their dreams are, and then the staff actually have them laminate them. And after they laminate them, they've gone to Michael's and gotten a roll of – it's like magnet and they cut of strips and they put it on the back of this goal card. And they tell people to hang that on their refrigerator because there are going to be days you are going to wake up and you do not want to go to school.

There are going to be days you wake up and you just want to roll over and go back to bed, not continue on your job search. And what we want customers to do is go back and look at their reasons for doing this because you're not doing it to go to school every day. You're doing it because of these life goals that you've set.

I'll tell you a very, very – it's got to be quick story. I joined Jenny Craig. It was about 20 years ago, but when I first went in, the counselor said to me, what brings you here? Because I want to get my oil changed. What do you think? I want to lose weight. She said, oh, I'm sorry. It's been a really long day. Let me restate the question.

She said, oftentimes when people join the Jenny Craig program, they do it because of something that's coming up. Maybe they're going to be in a wedding. Maybe they'll be the bride. Maybe they're the mother of the bride and they're going to be seen. Maybe it's that their doctor has told them you need to lose weight. Maybe it's that your clothes don't fit and you don't want to buy a new wardrobe. My question to you is why are you doing it.

And I said, oh, it's easy. I'm getting ready to go to my 20-year high school reunion. And what we talked about every single time I was at the Jenny Craig program, every week that I went in on Saturdays we talked about reunions. She asked me what I was going to wear, who I was going to see, what the venue was. We talked and talked about reunions because she was so adept at keeping me totally focused on why it is that I'm doing this, and I thought, bravo. That's what private sector does.

So then if I translate that into what I might do with a case manager is – to maintain that motivation is saying something like, you're taking some really important steps toward making a better life for your children. Now, I'm only going to say that if that's what their goal was. You're in school. You're making good progress. You only have four weeks left. Hey, have you even thought about a way to maybe celebrate with your kids once you finish the classroom training?

Are you going to – I don't know – bring – bake a cake or have some kind of a party? Keep their dream and what was important to them right in front of them. And that's where I'm saying that I think that we do it at the beginning and then we don't use that dream all the way through the participant's involvement.

Now, you want to be aware of warning signs that the client is beginning to cut the tie, and what are some of those signs. Not returning calls, not attending classes, missing meetings that you have set up. It's – I think there's a behavior that becomes fairly obvious. And so then what you want to do is look at how am I going to revive this slipping motivation? And as I said, there are two things, pieces of information you absolutely have to have, which is one is what are their life goals.

The second thing that I didn't really talk about and I'll just say it briefly but – is what I hate about my life right now. So sometimes complaints can be turned into goals. So I could have somebody who says, oh, my gosh. They're just complaining. I mean, not drawing out the complaints. They just complain as they're in my office, and they might say, oh, God, I hate that now that I can't afford car insurance, I have to ride the bus and I hate taking the bus. Then I can turn that into a goal.

So it sounds to me like one of the things that you want to be able to do is get the training that gets you the type of job that is going to help you to be able to afford your car insurance so that you can be on your own and independent again. So it's you want to listen so that when people are complaining, it's like make a note of that in your mind that that is something that can also use to motivate them.

Now, the quicker you catch slipping motivation, the greater the success. It's decreasing success as time goes on. So if I catch them in the first week, it's much easier to get them back in. A month, a little bit of time has passed. It's been 30 days since they quit, but if I'm only contacting customers once a quarter and so it's every three months, it is going to be a lot – we're going to have a lot less success in terms of reengaging them.

This means that you have to look at your case management policies as they relate to the frequency of contact. And I recognize and it's beyond what we're going to talk about in this session, although we could talk about it at the round table. Sometimes it means that I've got to triage clients, and people who are doing fine without me, I don't spend so much time on but those individuals who are in that danger group, I might need to increase the frequency because I've got to be able to get them over that hump.

So think about then somebody has dropped out or they're exhibiting these behaviors of I think that my motivation is slipping. And so somebody's missed an appointment and I'm going to call them.

Look at this dialogue. "Hi. This is Karen from the XYZ training program. I'm calling to reschedule your appointment. You were scheduled for Monday at 5:00 o'clock – or 3:00 o'clock, and you missed that appointment. I'd like to get you rescheduled." This sounds like I'm in trouble as a participant, and this individual I think are, if it's left as a phone message, not very likely to call me back. What's missing? I didn't remind them of their goal. Compare that to this.

Hi, Michelle. Hey, this is Ann. Hey, remember a while back when we met you said you hoped to get training so that you could provide a better job to provide for – more for your daughter? Hey, I'm wanting to work out a plan so that you can get back on track. I know how important increased money is to you and your children. Notice there it sounds like I am – I've described a need. I've offered a solution, and notice that it looks like I'm totally on this client's side. So that is a much better script.

And then the last example that I'll show you is – it's a more general if I don't really know what their goal was because I don't have that information. Hey, this is Robert, and I'm trying to reach you. Hey, my goal was to help you to increase your income or my goal was to help you to achieve financial stability or my goal was to help you to be able to get the kind of job that affords you the opportunity to be able to live on your own and not with your elderly parents, whatever it is they said. Fill in the blank.

We were working on a plan, and then we lost our momentum. Hey, I wanted to call to find out what I can do to help us get back on track because I really want to help you to – and again fill in that goal. Give me a call back. I'd be really excited to hear from you. And what I really love about this one is joint responsibility. It doesn't put the blame on the client, and it makes it easier for them to call. So if you compare the first blurb to the last two, I think the last two much more likely to get the client to give you a call back.

So our one last strategy and I just have three slides on this and I'm just going to show you examples. But the last point is to build recognition into the program and not just at the end. The people who make it to the end probably needed the recognition last to keep them going through because they made it. The people who are more in danger are people who needed recognition support all along the way. So I'm just going to show you three quick examples.

Here is one, and again, I just want you to see that I stay on theme. My theme is improve their income financial security. So congratulations on being admitted into the vocational training program. Hey, going to school, learning new skills, getting a diploma or license is an important step to earning more money in the future. I'm so happy that you've applied and been accepted.

And I think about this. My grandmother, when I got accepted into college, I was the first grandchild who ever went to college. She had a big barbeque in my honor, and so I hadn't even stepped one foot into school. Hadn't even actually accepted the invitation, but my family thought it was worthy of a party.

Here's one like the person's working and they got an increase in hours. Hey, working more hours means a bigger paycheck, and that's great. Even more impressive is it giving more hours shows that you've proven yourself to be a valued employee. I couldn't be happier. And I'm picturing these as a postcard, an e-mail, a telephone message, something that recognizes their achievements.

And the last one is just about retaining their job. So you remember when you joined the program that one of our goals was to help you increase your financial future, and you're doing just that. I know financially you're not exactly where you want to be because few people are, but you are closing the gap by having retained this job.

So as you go through your program, strategically add motivational techniques into your program design, and then the next time we're going to move forward and we'll be talking about job placement strategies, retention, and career advancement once they're on the job. So I'll turn this over to Tressa –

MS. DORSEY: Yeah.

MS. KELLY: – for questions.

MS. DORSEY: Awesome. Thank you so much, Jodie Sue.

It's funny. As you were going through that I actually thought to myself, I've actually done some of those horrible things where I sat there in an orientation and told people exactly some of those things you said not to. So it's always nice to see that you still have room to grow, I suppose, in the business. But I just want to thank you again for that presentation.

We're running right up to the top of the hour here, and so I do want to remind everyone, if you advance the slide, that we will be answering the questions that came in through the chat room on December 18th at 1:00 p.m. Eastern. We're going to have our follow-up round table call, and we're going to be addressing some of the questions that came through, examples of how to determine suitability, and some of the other contributions that we got during the webinar. Remember to bring your questions. We're also going to be featuring one of our grantees for that. It's My Community Initial will be talking about their motivational strategies for their participants.

And the next thing to remind you of is our upcoming TA. We also have part two coming up, as Jodie Sue mentioned earlier, on our ready to work long-term unemployed subject matter expert webinar series. And we are going to be focusing on job retention and career advancement. That will be coming up in February of 2016. So we'll be sending out some e-mails and some reminders for that as the day approaches.

And I'd also like to remind everyone about our LinkedIn platform in our group. We've heard that you want to be able to interact with your peers as much as possible, learn their best practices and strategies so assist you in the LTU population with gaining and maintaining their employment.

So remember to log in and set up a LinkedIn platform. The resources that are always helpful and I actually really liked this last e-newsletter, look for those in your mailbox. Those come out. We just had one a few weeks ago, and so we developed that resource. And then if for any reason, obviously, you have any questions, you can always contact your technical assistance coach or you can e-mail the ready to work mailbox for any type of technical assistance HUD reporting.

And then of course just want to thank Jodie Sue again for her time and her fabulous presentation, and we hope that you can all join us on Friday for our round table discussion. Thank you so much, everybody.

(END)