



**Better Tertiary and Trade Training Decision Making project
Telephone guidance pilot**

**Career guidance by telephone—a valuable tool for
experienced consultants**

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Career guidance by telephone—a valuable tool for experienced consultants

Purpose of this paper

This paper provides information and early findings about a telephone guidance pilot offering career guidance by telephone to young people. This pilot is one of three set up by Career Services' Better Tertiary and Trade Training Decision Making project (BTATTDM), to test new ways of making career information, advice and guidance available to 12 to 29 year olds.

The three personal service pilots within the BTATTDM project are the:

- telephone guidance pilot
- text 8007 pilot
- outbound contact pilot.

This paper deals with the first of these three pilots. Appendix D contains a brief summary of the other two pilots, both of which were completed and evaluated during 2007.

Summary

The pilot ran for eight months, from 1 July 2007 to the end of February 2008. The pilot used one experienced consultant who was based at Career Services' advice line contact centre in Wellington. During the first six months of the pilot, the consultant dealt with 202 clients. She had a total of 252 interactions with them. Most clients were referred to her by advice line staff.

The pilot was introduced after a research and development process that included:

- reviewing the literature
- consulting with staff at the 'learndirect' national learning advice line in the United Kingdom
- consulting with existing New Zealand telephone helplines
- developing a high-level design.

The main preliminary finding appears to be that telephone guidance can be effective for clients. Telephone guidance has real advantages for clients, but it does present a few challenges for consultants.

Advantages for clients

Telephone guidance offers several advantages for clients. They include:

- greater accessibility for those who are geographically or socially isolated, or have physical disabilities
- convenience—clients can choose when a call will take place, how long it will last, and when to end the session
- being highly focused—calls last an average of 26 minutes, compared with at least an hour for face-to-face interviews
- no overhead costs for travel and parking
- visual anonymity—for some clients the fact that they can't be seen allows them to share information more comfortably than they would face to face.

Challenges for consultants

Our consultant found that she had to change the way she worked to compensate for the loss of visual cues (such as body language) and visual aids (such as card sorts) while conducting sessions by telephone. The changes included:

- developing more intensive listening skills
- learning how to ask questions that are effective over the telephone, and which focus on getting as much information as possible in a short time
- greater use of techniques such as scaling questions and reflection, rather than visual aids such as card sorts.

The first six months of the pilot have now been evaluated by The Nielsen Company. The results of the evaluation will be written and recommendations made about the future of telephone guidance by the end of June 2008.

About the telephone guidance pilot

While working on developing the pilot we developed a working description of telephone guidance:

Put simply, telephone guidance is a service (technically mediated), where a practitioner uses a telephone to help the caller explore a range of career options, relate information to their needs and circumstances, and make decisions about learning and work.

We also came up with working descriptions for career information, career advice and career guidance to make it clear where telephone guidance fits within the services we offer. These descriptions can be found in Appendix B.

What is the telephone guidance pilot?

The telephone guidance pilot offered career guidance by telephone to young people aged 12 to 29. It ran for eight months from July 2007 to February 2008.

The pilot was carried out by the Better Tertiary and Trade Training Decision Making (BTATTDM) project. It is one of three pilots set up to test new ways of making career information, advice and guidance available to young people. The other two pilots were the text 8007 pilot and the outbound contact pilot (see Appendix D).

What is the BTATTDM project?

The BTATTDM project was established in response to research carried out by Career Services into the information needs of young people and their influencers. The research found that young people need help to interpret and personalise the large amount of information available about tertiary education and training. The research also found that young people need easy access to career information and advice in order to make effective decisions.

The BTATTDM project began in 2006 to help meet these needs. Its purpose is to further develop Career Services as a 'one-stop-shop' for young people and their influencers, looking for information and support to make good tertiary and trade training decisions that will help young people make successful transitions to the workplace.

The project is government funded, and will run for four years.

Why run a telephone guidance pilot?

Creating better access to career information

Career Services is committed to making it as easy as possible for people to access career information, advice, and guidance in whatever way suits them best: by using our telephone advice line, website, or text, or by visiting one of our offices. We see offering fully fledged career guidance by telephone as:

- an extension of our existing advice line service
- complementary to, rather than a substitute for, face-to-face career guidance.

Until recently, clients looking for career guidance from Career Services could access this through our face-to-face career guidance services via our branch office network or via our guidance online tool, Pathfinder. Our research has found that young people and their influencers want personal support to help them understand information about tertiary and trade training. With 96 percent of New Zealand households having access to a telephone,¹ we were keen to explore the possibility of extending our services by offering career guidance by telephone.

Exploring the potential of telephone guidance

Telephone counselling is not new. It has been available for more than 50 years, through organisations such as the Samaritans and Lifeline. Many countries, like New Zealand, now run telephone helplines to provide information about jobs and job training. However, few of them offer career guidance—the process that helps clients work out career goals and how to achieve them. In 2003 a report from the Organisation for Economic Co-operation and Development (OECD) on career guidance recommended exploring the potential of telephone helplines to deliver guidance services.²

Building research partnerships—United Kingdom's learndirect

The closest example of a telephone helpline offering career guidance is the learndirect national learning advice line in the United Kingdom. It is the world's largest telephone helpline, and deals with about a million calls every year. Among the services learndirect offers is career coaching by telephone. The focus of learndirect is on tertiary courses and training, and their target group is those with few or no skills and qualifications.

Career Services' focus is much wider than that of learndirect. We offer not just information about education and training, but broader career guidance—our clients have a wide range of skills and qualifications.

A free telephone advice line since 2000

Careers Services has run its free telephone career advice line since 2000. The advice line now has 10 trained staff, based in a contact centre at the national office in Wellington. They provide information and advice about different kinds of jobs, courses, and training options, using telephone, email, online chat, and text. They deal with about 45,000 calls every year. Advice line staff have traditionally referred callers who need more in-depth help to our regional offices for face-to-face career guidance appointments.

¹ At the time of the 2001 Census of Population and Dwellings.

² See: OECD, *Career Guidance and Public Policy: Bridging the Gap* (Paris, 2003)

Focus of the telephone guidance pilot

Our focus while running the telephone guidance pilot was to:

- establish how useful telephone guidance is for clients
- try a different method of practice
- be more accessible, particularly to those who cannot easily get to a Career Services office, or who do not have internet access
- take a client-centred approach
- be responsive to young people.

Preparing for the telephone guidance pilot

Before starting the pilot we carried out research to help design and develop it. This research included:

- reviewing the literature about similar projects in other countries
- consulting with staff at the learndirect national learning advice line in the United Kingdom
- consulting with existing New Zealand telephone helplines.

Our review of the literature

We found very little published information about career guidance by telephone as the practice is still relatively uncommon. The literature review examined two articles published in professional journals, a chapter from a book about the use of technology in counselling, and one unpublished article. Two of the four were about the experiences of the learndirect national learning advice line in the United Kingdom.

The main findings from the literature review were:

- clients are looking for telephone guidance
- telephone guidance is complementary to and enhances face-to-face contact
- telephone guidance has the potential to widen the client base
- offering guidance services by telephone provides accessibility, convenience, and flexibility for clients, and 'equality' between the client and the service provider
- distance guidance services provide a synergy between the internet, the telephone, and other forms of technology.
- research still needs to be done into the validity and reliability studies of telephone guidance
- practitioners need training to adapt to new technologies.

Consulting with staff at learndirect

The learndirect national learning advice line in the United Kingdom offers career coaching by telephone.

We spoke to two learndirect staff in Leicester and Manchester. One was a service delivery manager and the other was an operations manager. They provided useful practical advice, such as suggesting that consultants should be grouped together in a dedicated space in the contact centre.

One particularly useful result of our consultation was that it led to a peer-coaching link being established between our telephone guidance career consultant and a learndirect career coach.

At the time of our contact, learndirect had just finished evaluating its own telephone guidance trial. The results of this evaluation were presented in a paper shortly afterwards.³ The key findings from their evaluation were:

- there is a demand for telephone guidance
- service users were satisfied and experienced a range of positive outcomes
- telephone guidance is feasible on a large scale
- telephone guidance can be provided cost-effectively.

Consulting with existing New Zealand telephone helplines

We also visited and spoke to staff from the following telephone helplines:

- Youthline
- Samaritans
- Family Access Line (Ministry of Social Development)
- Lifeline/Kidsline
- Quitline.

The main findings from these visits were that:

- telephone counselling ranges in intensity, from very quick calls providing basic information to in-depth counselling that can last for several hours.
- career guidance by telephone sits in the middle of this range. It is often called 'solutions-based' counselling. Call lengths for this type of counselling generally range from 20 minutes to an hour.
- a successful solutions-based consultant needs to be prepared to work in a way that is pragmatic and action-based, rather than using traditional counselling techniques.
- most telephone helplines offer intensive training to their counsellors. Among the issues covered are:
 - counselling skills that work best on the telephone
 - basic structure of a call
 - ethics
 - privacy issues
 - importance of self-care.

Designing the telephone guidance pilot

Developing a high-level design

We developed a high-level design for the telephone guidance pilot before introducing it. The high-level design established the specifications for the pilot, including the dates and the location from which it would be run. The dates were 1 July 2007 to 29 February 2008. The location was the Career Services' advice line contact centre in Wellington. Staff at the contact centre provided information by telephone, email, online chat. and text about different kinds of jobs, as well as education and training courses.

³ See 'An evaluation of the Ufl/learndirect telephone guidance trial' December 2006. by Page, R, Newton, B, Hamilton, R, Hunt, W, and Hillage, J.

The high-level design also identified the target audience as:

- secondary school students and their influencers
- young adults who may be considering tertiary study or training.

We did not advertise the service, largely because we were not sure what the demand would be, or whether our one consultant would be able to meet demand. We made a decision to refer clients to the pilot from one main source—callers to the advice line who were in our target group and had guidance-related queries. These callers were referred to our consultant by advice line staff.

The design also included a business model outlining how the service would operate, from the first call to the Career Services advice line to the actual guidance session. Flow charts illustrated the course the process might take. In practice, the process has worked mostly as we anticipated, with one exception—most callers have opted to book a callback appointment time with our consultant, rather than being transferred to her directly by an advice line staff member.

Knowing that a session with a client is not a simple transaction or a linear process, we also developed a professional practice model that described the flow of a call. This model provided our consultant with a useful framework at the start of the pilot period, while she adapted to the telephone and developed her own style of working with clients.

The business and professional practice models used to develop the pilot are attached as Appendix C.

Staff recruitment and training

We advertised the position to existing Career Services staff. We were looking for an experienced consultant with a good understanding of career theory, and the ability—and desire—to make the leap to a different way of working.

We found her in Astrid van Holten, a consultant with eight years experience. Before starting work on the pilot project, Astrid undertook a two-week induction process. This involved refresher training in micro-counselling, and carrying out simulated telephone guidance sessions with Career Services staff and with volunteers from outside the service. She also received coaching from advice line staff in contact-centre processes, resources, and how to use the telephone system.

During the pilot, Astrid received regular supervision from an external practitioner. She met once a week with the head of the project, and exchanged information by email with a leardirect career coach.

Who used the telephone guidance service?

During the first six months of the pilot project (1 July to 21 December 2007), 202 clients used the service. Altogether our consultant had 252 interactions with these clients, made up of:

- 242 telephone calls
- five online chats
- five email enquiries.

Table 1 shows the number of sessions, clients, and interactions during the pilot.

Table 1: Number of sessions, clients, and interactions

Number of sessions (includes online chats and email enquiries)	Number of clients	Interactions
1	164	164
2	31	62
3	5	15
4	1	4
7	1	7
17	202	252

Of the 202 clients, 146 were female and 50 were male. Another six clients were of 'unspecified' gender. This means that they interacted with our consultant by online chat or email and did not specify their gender.

Table 2 shows the age ranges of the clients.

Table 2: Age ranges of clients

Age	Number of clients
Under 15	8
15–19	79
20–29	71
30–39	14
40+	9
Declined to specify	1
Yet to be asked	20
	202

Note: Most callers outside the target age group of 15 to 29 were parents or other influencers ringing on behalf of young people.

Advice line hours are from 8am to 8pm Monday to Friday and 10am to 2pm Saturday. The consultant was available during office hours, and regular evening appointments were also available.

Most clients made their initial contact through the advice line contact centre, and were then referred to our consultant for telephone guidance. In 16 cases the initial contact was made by someone other than the client—usually a parent.

The calls ranged in length from 12 minutes to more than an hour. The average length of call was 26 minutes.

Early results from the external evaluation suggest that around half the clients lived sufficiently far from the nearest Career Services office that a face-to-face visit would have been difficult.

Preliminary findings

The main preliminary finding from the pilot is that a skilled consultant can make telephone guidance work effectively for the client. We believe telephone guidance has real advantages for clients, but it does present challenges for consultants.

For clients, the advantages of telephone guidance are that it is:

- accessible
- convenient
- highly focused
- ecologically sustainable
- visually anonymous.

For consultants, the challenges of telephone guidance include:

- developing more intensive listening skills
- learning how to ask questions that are effective over the telephone, and which focus on getting as much information as possible in a short time
- more use of techniques such as scaling questions and reflection, rather than visual aids such as card sorts.

Advantages for clients

Accessibility

Early analysis of the figures suggests that, for many clients, telephone guidance provides a more accessible option than visiting a Career Services office. About half the clients were sufficiently geographically isolated that a face-to-face interview would have been difficult. Several clients had physical disabilities; and a number of others had mental health issues that made it difficult for them to seek guidance face to face.

Convenience

One of the advantages of telephone guidance is that it is convenient for the client. Unlike a face-to-face session it can, within reason, take place at a time that suits the client. It can also be done from home or from another comfortable location. For clients such as solo parents telephone guidance avoids difficulties such as childcare issues.

In addition, the calls last only as long as the client wants them to; the length of the call is based on the client's need and not the allocated appointment time. The nature of the conversation also means the calls are very solution-focused, and clients tend to present their issues upfront.

Highly focused sessions

In many cases the consultant found that the telephone conversations were more focused than a face-to-face session. There tended to be less rapport building at the beginning of the session. Instead, the clients were keen to get to the point of the session immediately, and rapport developed during the conversation.

The nature of the medium also meant there were fewer silences. This seems to be because most people feel uncomfortable with silence while talking on the telephone. In addition, there were no props (for example, card sorts) that would normally direct the conversation.

These factors combined meant that, in most cases, the telephone sessions were shorter than face-to-face sessions. The average call was 26 minutes. For this reason, during the pilot period our consultant was able to conduct more telephone sessions than she would have conducted if she had been working face to face.

The intensity of the sessions, and the fact that they often took place back to back, made it important for the consultant to take time out by, for example, going for a walk at lunchtime or leaving her desk for a few minutes.

Ecological sustainability

In the long term, telephone guidance has the potential to offer career guidance in a way that is ecologically sustainable. This is because it can be done without either the client or the consultant having to travel—thus avoiding carbon emissions and saving fuel.

Visual anonymity

Not being able to see each other has advantages for both the client and the consultant. It means neither can make judgements on the basis of the other's appearance.

Visual anonymity also seems to make it easier for some clients to reveal information they would not be comfortable talking about face to face. However, with the exception of one case, all clients were happy to give their first names, and most were happy to give their full names.

Challenges for consultants

Developing intensive listening skills

Our consultant became very aware that, in the absence of visual clues, such as body language, the client's tone of voice provided important clues about what they were thinking.

She also became more skilled at recognising when a client was telling her something important, or when they were disengaging from the conversation, or did not understand something.

Noise from the day-to-day activities at the contact centre added a layer of distraction that our consultant needed to filter out to concentrate fully on the client. The open environment she worked in occasionally created privacy issues. As Astrid worked with a cordless headset she solved this by going to another room. She also followed the Career Services code of practice.

Because clients are often in an open environment too, the consultant always made sure that they were in a relatively private environment, free of distractions; and that it was safe for them to talk (for example, that they were not driving).

Developing effective questioning

Questions are an important part of guidance, whether face to face or by telephone. Our consultant found she had to change the way she asked questions to keep the

conversation moving during telephone guidance sessions. In particular, she found it useful to ask very specific rather than more general questions.

She also found that it was important to ask questions that related directly to what the client had just said, rather than following a set process. However, she did devise a list of set questions to use as prompts if the conversation started to flag or she felt unsure about what question to ask next.

Finding out what works

Our consultant found that she had to use slightly different techniques from those she used in face-to-face sessions. This was necessary to help clients clarify their priorities and to keep the conversation going. The techniques she found useful included:

- scaling questions
- greater use of reflection
- helping clients devise an action plan.

Scaling questions involve ranking options on a scale of one to 10. Scaling is easy to do over the telephone and can help clients sort out which options and choices they prefer.

Our consultant found reflection—the process of summarising and repeating back to the client what they have just said—a useful way of making sure both she and the client were on the same track. It helped compensate for loss of visual cues from the client, such as smiling or nodding in agreement.

Our consultant also found it helpful to encourage clients to devise an action plan before finishing the call. One reason for this is that, unlike a face-to-face session, clients often had to wait to get additional information, either by mail or email. She found that in many cases they did nothing more while they waited. Setting an action plan was a useful way of making sure clients stayed focused on the next stage of the process.

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Appendix A: Case studies

For privacy reasons, all names in the following case studies have been changed.

Dean

Dean is a Year 13 student. He has always been very clear about what he wants to do when he leaves school. He has pursued his interest as a hobby, gaining some proficiency and experience.

A situation arose that led him to begin questioning his choice. He had become very confused, particularly as his family did not fully support his change of plan. As part of our discussion we did a 'heads or tails' exercise, flipping a coin to make a choice. We explored how he felt about the result and it became clear to him which direction he was most motivated to follow. He said he would have 'been gutted' if the coin toss had come up with the other choice.

Anne

Anne is 27 and lives on one of New Zealand's offshore islands. She has no landline telephone, limited mobile coverage, and no computer. She used the telephone at the local community centre for our discussion.

Anne has clear ideas of the kind of role she wants but does not know where to start to research them. The discussion focused on training and study requirements. Anne said that the session had been hugely helpful and she was thrilled that such a service was available.

Aroha

In Aroha's first career guidance session, her issue was whether to accept a new role with her current employer or look for another job. We explored the pros and cons of each decision.

In our second discussion, we talked about how the new role was going and set a time limit for making a decision about whether to stay or leave.

Aroha said that the discussion had been very helpful, particularly the chance to talk to someone objective. Since then she has had further telephone guidance sessions covering interview skills, and writing cover letters and job applications.

Brian

Brian is 16 and was picking his subjects for NCEA Level 3. In the discussion we talked about different occupations and also about the scholarships that were available. Because he had broadband internet access, he was able to look at the Career Services website and various other sites while we were talking.

Kim

Kim is a single parent with four children who is thinking about her future career direction. Kim had always taken whatever work she could pick up and had not previously thought about having a career plan.

We discussed her interests and goals, and information was sent out. A follow-up call was made where we discussed her ideas and options, and decided on a plan of action. A third call was made where Kim discussed some other ideas she had followed up on. Kim felt empowered to approach organisations with her CV rather than waiting to see what was advertised in the paper

Appendix B: Working descriptions for this pilot

The following working descriptions were used during the design and implementation of the telephone guidance pilot. They were used to help make it clear where telephone guidance sits within the services Career Services offers.

Career information

Career information is about providing factual assistance to our clients. It answers questions such as:

- which tertiary providers offer a particular course?
- what is the hourly rate for youth workers?
- how do I contact someone to discuss a student loan?

Information is likely to include:

- the physical dissemination of pamphlets
- website information
- internal knowledge/research
- brochures on courses and occupations and industry.

It may include advising where various services are and how they can be accessed.⁴

Career advice

Career advice includes a value-added service on top of the information. Advice is aimed at providing professional, informed, and interpretative assistance, which maximises the value of career information and that can assist clients towards clarity and next steps.

Advice includes assistance in the interpretation and application of career information. For example: 'Given the nature of your enquiry it could be worth exploring ...' or 'If you are interested in this course or occupation, you may also like to take a look at something similar.'

It involves trying to establish where the client is at the moment in (in terms of their career etc) and to provide appropriate assistance after listening to and clarifying the client's needs. Advice uses knowledge or experience held by the Career Services employee, for example, local labour market knowledge.⁵

Career guidance

Career guidance moves from the general provision of information and value-added advice to more detailed in-depth individual support and assessment. Once the discussion moves into a detailed assessment of the individual's personal circumstances, it starts to move into guidance. Guidance could include the following:

- an in-depth assessment of current career situation and planning requirements
- an in-depth examination of interests, values, personal qualities, and skills

⁴ CareerPoint pilot 2000 paper (Cuthell, Baker, Career Services rapuara 2000)

⁵ CareerPoint pilot 2000 paper (Cuthell, Baker, Career Services rapuara 2000)

- work and life-balance considerations
- making career decisions, or jointly developing a career plan.⁶

Telephone guidance

Telephone guidance is a technically mediated service where a practitioner uses a telephone to help callers explore a range of career options, relate information to their needs and circumstances, and support informed decisions about learning and work.

As Watts and Dent (2002) suggest, telephone guidance sits somewhere between face-to-face guidance and web-based guidance: 'It combines the synchronous interactivity of face-to-face work with the "at a distance" accessibility of web-based work.'⁷

Dent's expression for guidance that is possible by telephone as 'full-fat' guidance is helpful:

By tracking clients from the helpline into subsequent learning and labour market experience, we are now clear that not only is it possible to provide 'full-fat' guidance at a distance, but also that this can be done at high levels of efficiency.⁸

⁶ CareerPoint pilot 2000 paper (Cuthell, Baker, Career Services rapuara 2000)

⁷ Telephone Guidance Paper , March 2005 (David Johnson, Career Services rapuara 2005)

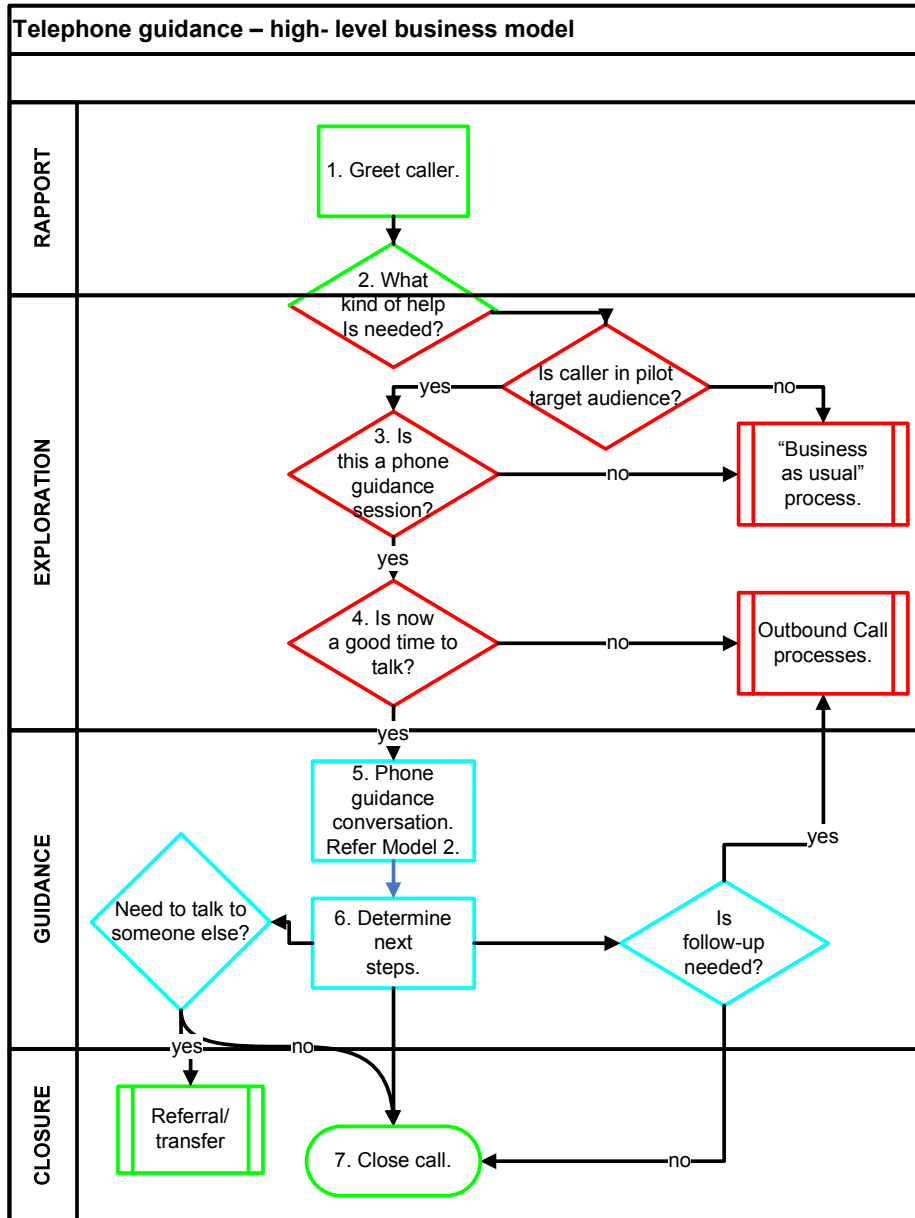
⁸ Dent, G. '*Providing Guidance at a Distance?*' Article from website UddannelsesGuiden—The Education Guide—Danish portal on learning opportunities and professions
<http://www.ug.dk/Videnscenter%20for%20vejledning/Forside/Virtuelt%20tidsskrift/2005%20nr%203/Providing%20guidance%20at%20a%20distance.aspx>

Appendix C: The models used to develop this pilot

The following two models are part of the high-level design for the telephone guidance pilot.

Model 1

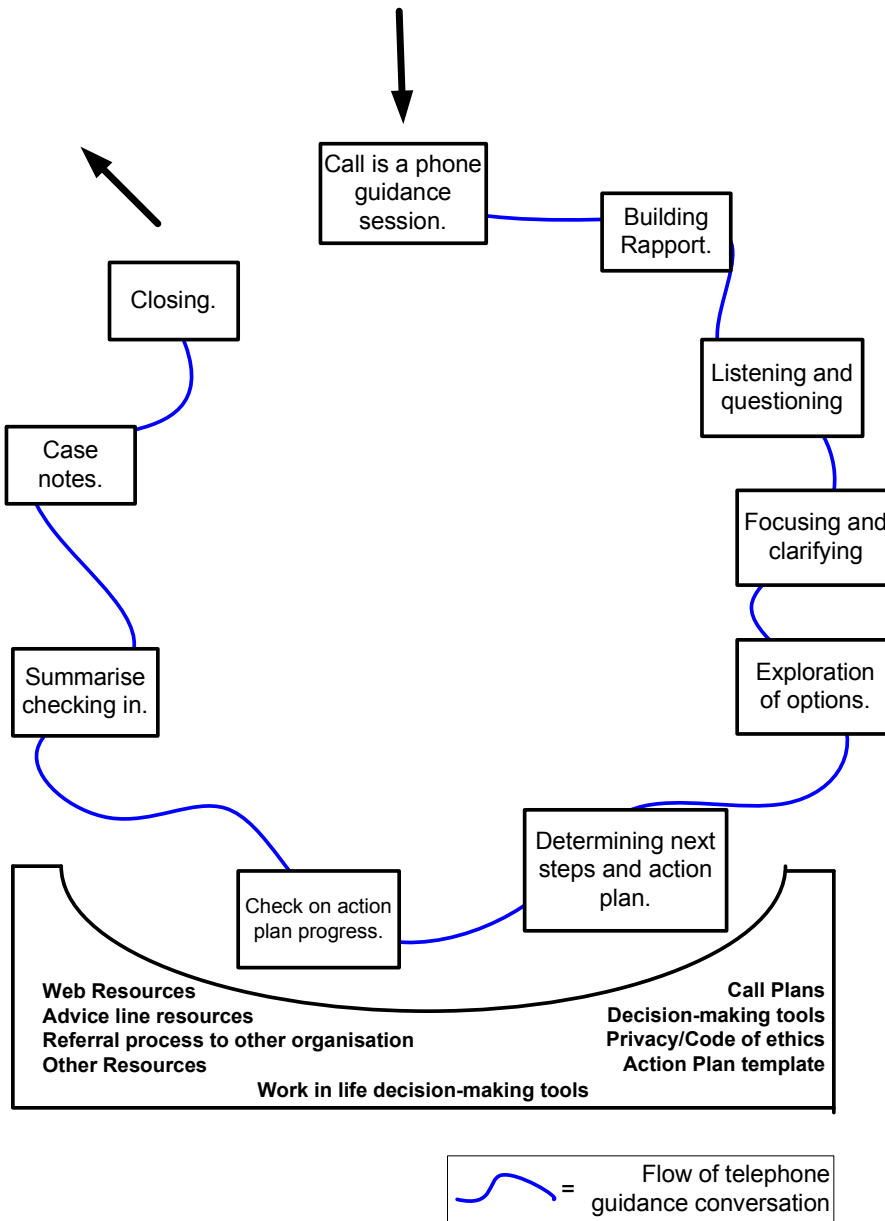
The following telephone guidance business model describes the overall process a caller will go through, including the handover from adviser to telephone guidance consultant.



Model 2

The professional practice model is a description of the process that a telephone guidance consultant and client go through together during a call.

Professional practice process for telephone guidance



Appendix D: The two other BTATTDM pilots

The telephone guidance pilot is one of three personal support pilots run by the BTATTDM.

The other two are

- the text 8007 pilot
- the outbound contact pilot.

Both of these pilots ran and were evaluated during 2007.

The text 8007 pilot

This pilot, which began in June 2007, allowed young people in the target audience to text a free number to ask for career information. This information was then sent to them by mail.

An evaluation of the pilot project by AC Nielsen found that 66 percent of those who used the free text service would not otherwise have contacted Career Services. The BTATTDM team and advice line have now drawn up a set of recommendations to develop. In the meantime, the service is still available in its original form.

Feedback from the evaluation survey includes the following:

‘Really it was easy and simple to do. The instructions were clear and easy to follow. Overall it was great.’

‘I don’t really think that the texting services should improve because it’s already a very good service and it also saves our time. It doesn’t take that long to text the Career Service, you get your reply as soon as you text them, so yeah it saves most of our time.’

The outbound contact pilot

This pilot began in March 2007. It offered young people in the target audience who contacted the Career Services advice line the option of a follow-up telephone call or an email in two weeks time. A total of 263 clients opted to use the service during the pilot period, which finished at the end of July 2007.

The evaluation found high levels of satisfaction, with clients saying it was a valuable way to keep them motivated and well supported. It is now a permanent part of the advice line service.

Feedback from the evaluation survey includes the following:

‘They contacted me back straight away and were really interested in what I had to say.’

‘She would always ring back and to see what I had done and throw out other options out there and to see what was best for me.’