

# Prospective Client Package



<http://www.dreams-goals.com/services-all/individuals/>

Presented by:

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Independent Education/Career Consultant

*Your Dreams & Goals*

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## **Documents Included:**

- So How Do Find and Get Your Dream Job? /
- Different Types of Counselors
- Client – Terms of Agreement
- Career Services Special Offers
- Client Intake

# So How Do You Find and Get Your Dream Job or Career?

*It's a process and journey that only you can take*

## **Phase 1: Self Awareness** (*Getting to know yourself*)

- **Personality** (How you are wired will affect how you respond to the world and your job.)
- **Abilities** (What you do well and don't do well will impact your success at what you attempt to do.)
- **Interests** (What are your passions that fuel your motivation?)
- **Values** (What is important to you will affect your choices and your success. )
- **Skills** (What do you want to do?)
  - **Technical** (What skills do you want to use to do a specific job?)
  - **Transferrable** (What skills do you want to take with you from job to job and career to career?)
- Preferred **Learning Styles** (How you best learn will affect your success.)
- **Life Patterns** (What do the patterns and themes of your life reveal? Seek freedom, knowledge, security, peace, support, etc.)



## **Phase 2: Options Exploration** (*What options are good for you based on who you are?*)

- **Explore** your options (What kinds of jobs reflect your personality, abilities, interests, values, skills, and learning styles?)
  - What kind of working environments fit you? (Stable, hands-on, adventurous, creative, nurturing, goal-oriented, etc.)
- **Research** your options (Learn about your choices)
  - What is the job like? (Skills and education needed, working conditions, labor market trends, positive and negative traits)
- **Education** — How much schooling is required to get this job? (H.S. Diploma, Certificate, AA, BS, MS, Ph.D., etc.)
  - What schools offer this kind of education / training? (Colleges, universities, trade schools, etc.)
  - What subjects will you need to study and what skills do you need to learn? (Business, social science, biology, art, etc.)
  - How do you prepare for this education / training program? (Prep classes, entrance exams, references, etc.)

## **Phase 3: Reflection** (*What do you think of this information?*)

- How well does this goal **reflect you**? (Well, not at all, somewhat)
- What are the **good things** about this goal? (Rewarding career, good pay, stable outlook, etc.)
- What are the **negative things** about this goal? (High stress and burn out, unstable opportunities, too much education, etc.)
- What is your **response** to what you learned? (How is your "inner voice" speaking to you? Yes, No, or Maybe, etc.)
- What are your **next steps**? (Set goals, create an education plan, develop job search skills, identify new prospects, etc.)
- **Seek help** from education and/or career counselors /advisors (Professionals who can help you make wise choices)
- **Revise goals** as appropriate (New and relevant information, good opportunities, changes in labor market trends, etc.)

## **Phase 4: Decision Implementation** (*Setting long-term and short-term goals*)

- **Education**
  - Set your **educational goals** (What do you want to learn, where do you want to go to school, highest level to pursue)
  - Identify what you **need to do** to get in (Take assessments and prep classes, provide transcripts, biography, etc.)
  - Develop an **education plan** (Identify classes you need to take and the order in which you need to take them)
  - **Succeed** in school (Develop good study habits, seek professional help, find support, learn to navigate helpful resources)
- **Career**
  - **Identify** Entry-Level and Transition jobs that will prepare you for your dream job (While you are still learning)
  - Develop good **Job-Search Skills** (Finding leads, networking, resumes, on-line presence, interviewing, and negotiating, etc.)
  - Get **Entry-Level Job** (While you are still learning)
  - Identify **Transition Jobs** (While you are still in your Entry-Level job)



## **Phase 5: Re-evaluation & Renegotiation** (*Respond to life by revising plans as needed while on your journey*)

- **Re-evaluate**—What have you learned about your self and your goals based on what happened?
- **Renegotiate** — Set and achieve new goals based on re-evaluation of self and circumstances

# Different Types of Counselors:

*Some Overlapping Skills, but Differing Specializations*  
(Get the right help from the right person at the right time)

## Phase 1: Self Awareness *(Getting to know yourself)* ▲▲▲

- **Personality** (How you are wired will affect how you respond to the world and your job.)
- **Abilities** (What you do and don't do well will impact your success at what you attempt to do.) ▲
- **Interests** (What are your passions that fuel your motivation?) ▲
- **Values** (What is important to you will affect your choices and your success.) ▲
- **Skills** (What do you want to do?) ▲
  - **Technical** (What skills do you want to use to do a specific job?)
  - **Transferrable** (What skills do you want to take with you from job to job and career to career?) ▲
- Preferred **Learning Styles** (How you best learn will affect your success.) ▲
- **Life Patterns** (What do the patterns and themes of your life reveal? Seek freedom, knowledge, security, peace, etc.) ▲▲▲▲

**Legend:**

Career Counselor	▲
Education/Academic Counselor	▲
Rehabilitation Counselor (DSS)	▲
Career Coach (Job Search)	▲
Mental Health Counselor	▲
Faith-based Skilled Helpers	▲
Financial Aid Counselors/CFPs	▲
▲ = Overlapping specializations	

## Phase 2: Options Exploration *(What options are good for you based on who you are?)*

- **Explore** your options (What kinds of jobs reflect your personality, abilities, interests, values, skills, and learning styles?) ▲
  - What kind of working environments fit you? (Stable, hands-on, adventurous, creative, nurturing, goal-oriented, etc.)
- **Research** your options (Learn about your choices) ▲
  - What is the job like? (Skills and education needed, working conditions, labor market trends, positive and negative) ▲
- **Education** — How much schooling is required to get this job? (H.S. Diploma, Certificate, AA, BS, MS, Ph.D., etc.) ▲
  - What schools offer this kind of education / training? (Colleges, universities, trade schools, etc.) ▲▲
  - What subjects will you need to study and what skills do you need to learn? (Business, social science, biology, art, etc.) ▲
  - How do you prepare for this education / training program? (Prep classes, entrance exams, references, etc.) ▲▲

## Phase 3: Reflection *(What do you think of this information?)* ▲

- How well does this goal **reflect you**? (Well, not at all, somewhat)
- What are the **good things** about this goal? (Rewarding career, good pay, stable outlook, etc.) ▲
- What are the **negative things** about this goal? (High stress and burn out, unstable opportunities, too much education, etc.) ▲
- What is **your response** to what you learned? (How is your "inner voice" speaking to you? Yes, No, or Maybe, etc.)
- What are your **next steps**? (Set goals, create an **education plan**, **develop job search skills**, **identify new prospects**, etc.) ▲▲▲
- **Seek help** from **education** and/or **career** counselors /advisors (Professionals who can help you make wise choices) ▲
- **Revise goals** as appropriate (New and relevant information, good opportunities, changes in labor market trends, etc.) ▲

## Phase 4: Decision Implementation *(Setting long-term and short-term goals)*

- **Education**
  - Set your **educational goals** (What do you want to learn, where do you want to go to school, highest level to pursue) ▲
  - Identify what you **need to do** to get in (Take assessments and prep classes, provide transcripts, biography, etc.) ▲▲
  - Develop an **education plan** (Identify classes you need to take and the order in which you need to take them) ▲
  - **Succeed** in school (Develop good study habits, seek professional help, find support, learn to navigate helpful resources) ▲
- **Career**
  - **Identify** Entry-Level and Transition jobs that will prepare you for your dream job (While you are still learning)
  - Develop good **Job-Search Skills** (Leads, networking, resumes, on-line presence, interviewing, and negotiating, etc.) ▲▲
  - Get **Entry-Level Job** (While you are still learning)
  - Identify **Transition Jobs** (While you are still in your Entry-Level job) ▲▲

## Phase 5: Re-evaluation & Renegotiation *(Respond to life by revising plans as needed while on your journey)*

- **Re-evaluate**—What have you learned about your self and your goals based on what happened? ▲▲▲▲▲
- **Renegotiate** — Set and achieve new goals based on re-evaluation of self and circumstances ▲▲▲▲▲



## Terms of Agreement

Client Name: \_\_\_\_\_ Date: \_\_\_\_\_

This agreement describes the relationship between the following two parties:

**(CONSULTANT)**

Kathleen E. High, M.Ed., CCSP, FCD-I  
P.O. Box 1126  
Chino Hills, CA 91709  
(909) 353-4762  
www.dreams-goals.com

**(CLIENT):**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

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**CONSULTANT:**

1. Consultant will provide the Client with the information, resources, and support so the Client can learn what s/he needs to do to achieve her/his goals.
2. Consultant will, at all times, act in the best interest of the Client and his/her needs and goals.
3. Consultant will keep Client's information confidential, except where required by law, or if outside consultation from other professionals is necessary.
4. Consultant's recommendations and actions will take into consideration Clients' out-of-pocket expenses and budget concerns, thus striving to minimize costs incurred by the Client.
5. Consultant will provide, at her discretion, assessments and learning opportunities for the Client that will be designed based on the Client's individual needs, stated goals, and preferred learning style(s).
6. Consultant reserves the right not to support goals, which are not consistent with, or in congruence with, the Client's assessment results if applicable.
7. Consultant reserves the right, at her discretion, to refuse to support or encourage potential goals on the basis of moral, legal, or ethical concerns.
8. Consultant reserves the right to terminate the relationship on the basis of lack of effort, cooperation, responsiveness, or responsibility on the part of the Client.
9. Consultant makes no claim or guarantee of success for the Client's stated goals. Ultimate success is up to the Client and his/her actions.

## Client – Terms of Agreement

10. At her discretion, the consultant will release the Client from this relationship based on Client's successful demonstrated ability to identify own learning needs, and ability to set and achieve own goals.

### CLIENT

1. Client understands that this is an interactive process in which he/she must participate.
2. Client understands and accepts that the process will require time, money, and effort on his/her part in order to identify and achieve his/her goals.
3. Client agrees to pay Consultant \$90.00 per hour for consulting services. Sessions normally scheduled for 1-hour sessions.
4. If appropriate to Client's stated goals, Client agrees to pay Consultant for assessment and other learning materials as recommended by the Consultant. Based on client's stated goals, assessments may not always be relevant to some client's goals. Standard assessment fees are:
  - 1) Myers-Briggs Type Inventory (MBTI) – Step I = \$50.00
  - 2) Strong Interest Inventory = \$50.00
  - 3) Myers-Briggs Type Inventory (MBTI) – Step II = \$75.00 (*optional*)
5. Services and assessments are payable upon rendering of service. Clients have two options for payments of services:
  - 1) Client can pay for each appointment at the time of service at the regular rate.  
Or
  - 2) Client can choose to prepay a discounted flat fee for one of a few special offers. (See attached document for details.) Consultant will let Client know if this option is appropriate based on the Client's stated goals.
    - 1) Fee must be paid at least 24 hours before second the second appointment for discount to be applied.
    - 2) Client can request additional follow up appointments as needed or desired. Standard rates apply for additional follow-up appointments.
6. Acceptable forms of payment (*in order of preference*) are: Debit/credit card, cash, PayPal, and through consultant's website.
7. Client agrees to be honest with self and Consultant regarding any issues or challenges, which will affect this relationship or the Client's journey.
8. Client assumes responsibility for success at setting and achieving goals.
9. Client will complete all homework assignments received from the Consultant in a timely fashion.

Client – Terms of Agreement

10. Client agrees to inform Consultant if he/she has difficulty in accomplishing tasks due to lack of understanding instructions, confusion, becoming overwhelmed by the task, or too distracted by outside responsibilities.
11. If scheduled appointment needs to be changed, then the Client will notify the Consultant at least 24 hours in advance.
12. Client reserves the right to cancel this agreement with one-week notice without cause.

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Consultant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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*Kathleen E. High, M.Ed., CCSP, FCD-I, Education and Career Consultant*

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## Career Services Special Offers

<b>1</b>	<p style="text-align: center;"><b>Career Exploration</b></p> <p>This interactive package is designed to help individuals identify potential career opportunities to explore. Additional relevant support resources offered as desired and/or appropriate.</p> <ol style="list-style-type: none"> <li><b>1. Four Consultations:</b> One-on-one consultation to support the client’s career exploration process consisting of: An Initial Intake session, An Assessment Interpretation session, an Options Exploration Strategies session and Decision Implementation Strategies session.</li> <li><b>2. Assessments:</b> Your career exploration assessments will include a Myers- Briggs Type Inventory (MBTI) – Step I (personality preferences evaluation), Strong Interest Inventory (interests and skills) assessments and values inventories assessment.</li> <li><b>3. Optional assessments:</b> Clients can choose additional (optional) assessments (<i>additional fees may apply</i>) if desired and appropriate, such as MBTI - Step II (next level assessment), StrengthsFinder assessment, etc.</li> <li><b>4. Additional appointments:</b> Additional appointments available as desired (additional fees apply.)</li> </ol>	<b>\$500.00</b>
<b>2</b>	<p><b>Assessment Administration</b> This interactive package is designed for individuals who want to take one or more self-awareness assessments for personal growth, or reasons other than to engage in the career development/exploration process. Additional relevant support resources offered as desired and/or appropriate. Fee listed is per appointment for consultant’s time. (<i>MBTI Step I and Strong can be done in one appointment. MBTI Step II, Values and StrengthsFinder do not require additional appointments.</i>) Plus, the following fees for assessment administration: Any combination based on interest:</p> <ol style="list-style-type: none"> <li><b>1. Myers- Briggs Type Inventory (MBTI):</b> (<i>personality preferences</i>)             <ol style="list-style-type: none"> <li>a) <b>Step I:</b> (<i>What you have in common with others like you</i>) ..... <b>\$50.00</b></li> <li>b) <b>Step II:</b> (<i>How you are different from them - optional</i>) ..... <b>\$75.00</b></li> </ol> </li> <li><b>2. Strong Interest Inventory</b> (interests and skills) assessment..... <b>\$50.00</b></li> <li><b>3. Values assessments</b> can be provided at no charge..... No charge</li> <li><b>4. StrengthsFinder</b> (<i>Can purchase directly and self-administer</i>) ..... <b>\$19.99</b></li> <li><b>5. Murphy-Meisgeier Type Indicator for Children (MMTIC).</b> This assessment is based upon the same theory as the MBTI, but it is an assessment and reporting process designed for children aged 7-18. <b>\$75.00</b></li> <li><b>6. Additional appointments:</b> Additional appointments available as desired for additional fees.</li> </ol>	<b>\$100.00</b>

<p style="text-align: center;"><b>Job Seeker Support – Comprehensive</b></p> <p>This interactive package is designed to help individuals develop effective job search skills and is best suited for individuals who are new to the job search process and may have limited knowledge about the subject. Additional relevant support resources offered as desired and/or appropriate.</p> <p><b>1. Five Consultations:</b> One-on-one consultations to support the client’s job search process with skills assessment, marketing tools, job search strategies, interviewing techniques, and managing personal transition issues as listed:</p> <p><b>2. Skills Assessment:</b> Assist client in identifying their in-demand technical and transferable skills. Identify current skill-set to determine if those skills need to be updated. Provide resources and referrals for identifying appropriate training programs for skills development as needed.</p> <p><b>3. Marketing Tools:</b> Provide resources to assist the client in developing effective job search marketing tools, including creating or updating their <b>Resume, LinkedIn Profile, and ‘elevator pitch’</b>. Other marketing tools such as creating professional portfolios and/or social media profiles (<i>if appropriate</i>). Two critiques of the resume and LinkedIn profile each are included in this process.</p> <p><b>4. Effective Job Search Strategies:</b> Provide resources for developing effective job search strategies, including networking, social media search, and profession-specific search strategies as appropriate.</p> <p><b>5. Interviewing Techniques:</b> Provide applicable resources and assistance in developing effective interview skills. Mock one-on-one interviews and interview coaching is included.</p> <p><b>6. Managing Personal Transition Issues:</b> Introduction to resources as appropriate for transition, financial, and other issues that can interfere with the client’s ability to engage in an effective job search process.</p> <p><b>7. Additional appointments:</b> Additional appointments available as desired for additional fees.</p>	<p style="text-align: center;"><b>Job Seeker Support – Moderate</b></p> <p>For clients who need moderate support. These clients are already somewhat aware of their strengths, marketable skills, what type of jobs they are seeking, and may already have a resume. However, they may need help in developing effective job search strategies. Additional relevant support resources offered as desired and/or appropriate.</p> <p><b>1. Four consultations:</b> One-on-one consultations to support the client’s job search process with marketing tools, job search strategies, and interviewing techniques, as listed:</p> <p><b>2. Marketing Tools:</b> Provide resources to assist the client in developing effective job search marketing tools, including creating or updating their <b>Resume, LinkedIn Profile, and ‘elevator pitch’</b>. Other marketing tools such as creating professional portfolios and/or social media profiles (<i>if</i></p>	<p style="text-align: center;"><b>\$375.00</b></p>
<p><b>3</b></p>	<p><b>4</b></p>	<p style="text-align: center;"><b>\$300.00</b></p>

Career Services Package Deals

	<p><i>appropriate</i>). Two critiques of the resume and LinkedIn profile each are included in this process.</p> <ol style="list-style-type: none"> <li><b>Effective Job Search Strategies:</b> Provide resources for developing effective job search strategies, including networking, social media search, and profession-specific search strategies as appropriate.</li> <li><b>Interviewing Techniques:</b> Provide applicable resources and assistance in developing effective interview skills. Mock one-on-one interviews and interview coaching is included.</li> <li><b>Additional appointments:</b> Additional appointments available as desired for additional fees.</li> </ol>	
<b>5</b>	<p style="text-align: center;"><b>Job Seeker Support – Limited</b></p> <p>For clients who only need support in limited areas due to prior job search experience and thus only need help in one area, such as resume revision and critique, job search strategies, networking, or interview coaching, etc. Additional relevant support resources offered as desired and/or appropriate.</p> <ol style="list-style-type: none"> <li><b>Three consultations:</b> One-on-one consultations to support the client’s specific job search needs.</li> <li><b>Focus:</b> Appointments will focus on one primary topic to address based on client’s primary concern.</li> <li><b>Additional appointments:</b> Additional appointments available as desired for additional fees.</li> </ol>	<b>\$250.00</b>
<b>6</b>	<p style="text-align: center;"><b>Resume and/or LinkedIn Critique</b></p> <p>For clients who only need a professional critique of a current and updated resume.</p> <ol style="list-style-type: none"> <li>This includes a one-on-one conversation about job search goals to ensure that the resume is optimized to such goal, suggestions for optimizing to the goal, and a final review after suggestions are implemented. Additional relevant support resources offered as desired and/or appropriate.</li> <li><b>Additional appointments:</b> Additional appointments available as desired for additional fees.</li> </ol>	<b>\$100.00</b>

*Kathleen E. High, M.Ed., Education and Career Consultant for over 20 years.  
 CCSP, FCD-I, MBTI, Strong, & MMTIC Certified administrator  
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<https://www.linkedin.com/in/kathleenhigh1/>





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### Client Intake

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Age:** \_\_\_\_\_ **Birth date:** \_\_\_\_\_ **Gender: Male** \_\_\_ **Female:** \_\_\_

**Home Address:** \_\_\_\_\_ **Work Name and Address:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Prefer to be called at:** Work Home Cell Other \_\_\_\_\_

Day Phone: \_\_\_\_\_ (work/ home/ other)

Night Phone: \_\_\_\_\_ (work/home/other) (Latest time to call \_\_\_\_\_)

Cell or other: \_\_\_\_\_

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

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### Tell me a little about yourself:

**Why are you seeking consulting?**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**At this time, are you interested in consulting with (check all that apply):**

Education       Career       Service       Life Purpose

**What is your current profession?** \_\_\_\_\_

**How many hours per week do you normally work?** \_\_\_\_\_

**What is your current level of education?** \_\_\_\_\_

*(Less than high school, high school, some college, trade school, Bachelor's degree, Master's degree, Doctorate degree, etc.)*

**Did you study something specific (a major)? If so, what?** \_\_\_\_\_

How do you prefer to access and use documents?     Paper version     Online version  
*(downloadable PDF)*

**How did you hear of Your Dreams & Goals?**

**Direct Contact** (with Kathleen High) – Source: \_\_\_\_\_

**Referral:** Name of referring person/institution: \_\_\_\_\_

**Website Listing:** Name of referring institution: \_\_\_\_\_

**Internet Search:** \_\_\_\_\_

**Other:** \_\_\_\_\_

**Please Tell Me About Your Personal Life:**

*(This information will help me to understand you better and to help you identify those things in your life, which will affect your journey towards achieving your goals.)*

**Marital Status:**

Single     Married     Divorced/Separated     Widowed

Involved/otherwise committed     Other \_\_\_\_\_

**Do you have children?**     Yes     No

**If yes, please list names and ages and if they are dependent on you:**

		<i>Age</i>	<i>Name</i>	<i>Dependent Status</i>
<input type="checkbox"/> Male	<input type="checkbox"/> Female	_____	_____	_____
<input type="checkbox"/> Male	<input type="checkbox"/> Female	_____	_____	_____
<input type="checkbox"/> Male	<input type="checkbox"/> Female	_____	_____	_____
<input type="checkbox"/> Male	<input type="checkbox"/> Female	_____	_____	_____
<input type="checkbox"/> Male	<input type="checkbox"/> Female	_____	_____	_____

**Other Responsibilities:**

Please list other activities, which regularly occupy your time:

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**Other Questions or Comments you have for me:**

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**For Office Use:**

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Begin: Y / N / L \_\_\_\_\_ Tools: MBTI SII SF

Others: \_\_\_\_\_

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