

# Telephone guidance: what is advanced professional practice?

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# Telephone guidance: what is advanced professional practice?

This workshop will explore the key constituents of advanced professional practice in telephone guidance and how, if at all, these differ from practice in face to face guidance. It will focus on the telephone service provided by the Careers Advice Service (CAS) – now, Next Step in England, 2010



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# More questions than answers?

- How do you define advanced professional practice in guidance?
- What are the constituent issues and how do you measure them?
- What are key differences between guidance over the phone and face to face?
- What is the client's point of view, do clients feel more satisfied after an intervention with an advanced professional practitioner?

# Some background

- The service started in 1998 (*Watts and Dent 2008*), as ***learndirect advice*** under the *University for Industry (Ufi) banner*
- Rebranded Careers Advice Service when it moved to the Learning and Skills Council (LSC in 2008)
- In 2010 responsibility for the CAS moved to the Skills Funding Agency
- In August 2010 the CAS was be integrated into a new adult careers service for England, Next Step.
- BSS (Broadcasting Support Services), a not for profit organisation providing public service contact points, delivers this service on behalf of the Skills Funding Agency
- It provides an information, advice and guidance service for adults in England and Northern Ireland.

# Context

The telephone advice service received around 600,000 telephone calls in 2009, around 12% of which were referred to or received by a 'Careers Coach' (BSS 2010).

*'Guidance delivered by telephone is of good quality measured against standards used in the assessment of face-to-face guidance'* (Watts and Dent 2008, p.464).

A study found that clients who received telephone counselling were found to be more satisfied than those who received face to face counselling, Kenny and McEachern (2004) .

# Context

Watts and Dent (2008) identified three key trends during the development of the CAS as a distance delivery service:

- Numbers of telephone interactions were decreasing while web based sessions were growing in number
- Information/advice type calls diminished, while guidance oriented interventions grew in number
- There was a move from mainly learning related enquiries towards a more career oriented service.

# Defining advanced professional practice

- An elusive concept its constituent elements may be subject to debate and controversy.
- No known agreed definition of 'advanced professional practice' in telephone guidance nor in broader guidance fields
- Schon (1983), Hambly (2002) and others have considered the ingredients of advanced professional practice, although Schon's work considered the topic in general, not in relation to career guidance.



# Recognition by the ICG

All Next Step (CAS) telephone guidance practitioners have achieved advanced practitioner status with the Institute of Careers Guidance, demonstrating their commitment to CPD. Membership requires that they adhere to the ICG Code of Ethics (ICG, 2009). The adherence to operating within the ethical guidelines of the profession is considered of paramount importance by this service

# A working definition

‘an advanced professional practitioner in telephone guidance is one who welcomes new ideas for practice, actively tries out new techniques taking a flexible approach and openly engages in self-reflection’. Hayley Warrington (Christopoulos et al. 2010)

# What is standard professional practice?

- Difficult to define standard professional practice in telephone guidance
- The telephone guidance work primarily to six of the seven elements of the UDACE definition of guidance. This defines guidance as seven activities: informing; advising; counselling; assessing; enabling; advocating and feeding back. Advocating - negotiating directly with institutions or agencies on behalf of individuals or groups for whom there may be additional barriers to access or to learning, (UDACE, 1986) is one aspect of guidance that CAS does not offer.

# How is advanced professional practice (APP) developed?

The Careers Advice Service developed six processes to assess, promote and evaluate APP. Three take place formally in monthly call reflection meetings; these are reflective practice, mentoring and skills/cluster groups. The other three processes, the e-portfolio, the Quality Framework and levelling support and promote advanced professional practice (Christopoulos et al. 2010). The Quality Framework defines 24 desired outcomes related to CAS guidance practices.

# A developing model?

- Development of a tiered classification, based on the skills pyramid (Ali and Graham, 1996)
- But recognition that boundaries may change and that the skill elements considered are not an exhaustive or long term definitive list
- Some skills areas develop within a continuum and do not sit in isolation in one level of the adapted pyramid

# Developing a model

- The adapted skills pyramid describes the three skill levels as foundation, intermediate and advanced
- The skills pyramid model illustrates that '*some skills are more fundamental than others, although all are essential within a helping relationship*'. Kidd (2006, p.95) .
- The most fundamental skills, at the base of the pyramid, are active listening skills, listening both to the words and the feelings expressed. The mid pyramid level shows understanding skills or reflective skills, for instance the use of open questions. This skill level can be used to develop empathy with the client. The highest level of skills illustrated by the pyramid are interpretative skills, including challenge. Kidd suggests that interpretive skills are used later in career counselling interactions and that the use of higher level skills are particularly powerful having a greater influence on '*the direction of the process*' (p.96).

# How outcomes have been measured in CAS (1)

The outcomes of career counselling have been measured in terms of process research and outcome research. Whilst methodologies for telephone guidance are ill-defined, conclusions can be drawn about the effectiveness of telephone guidance as delivered by the CAS via the following methods.

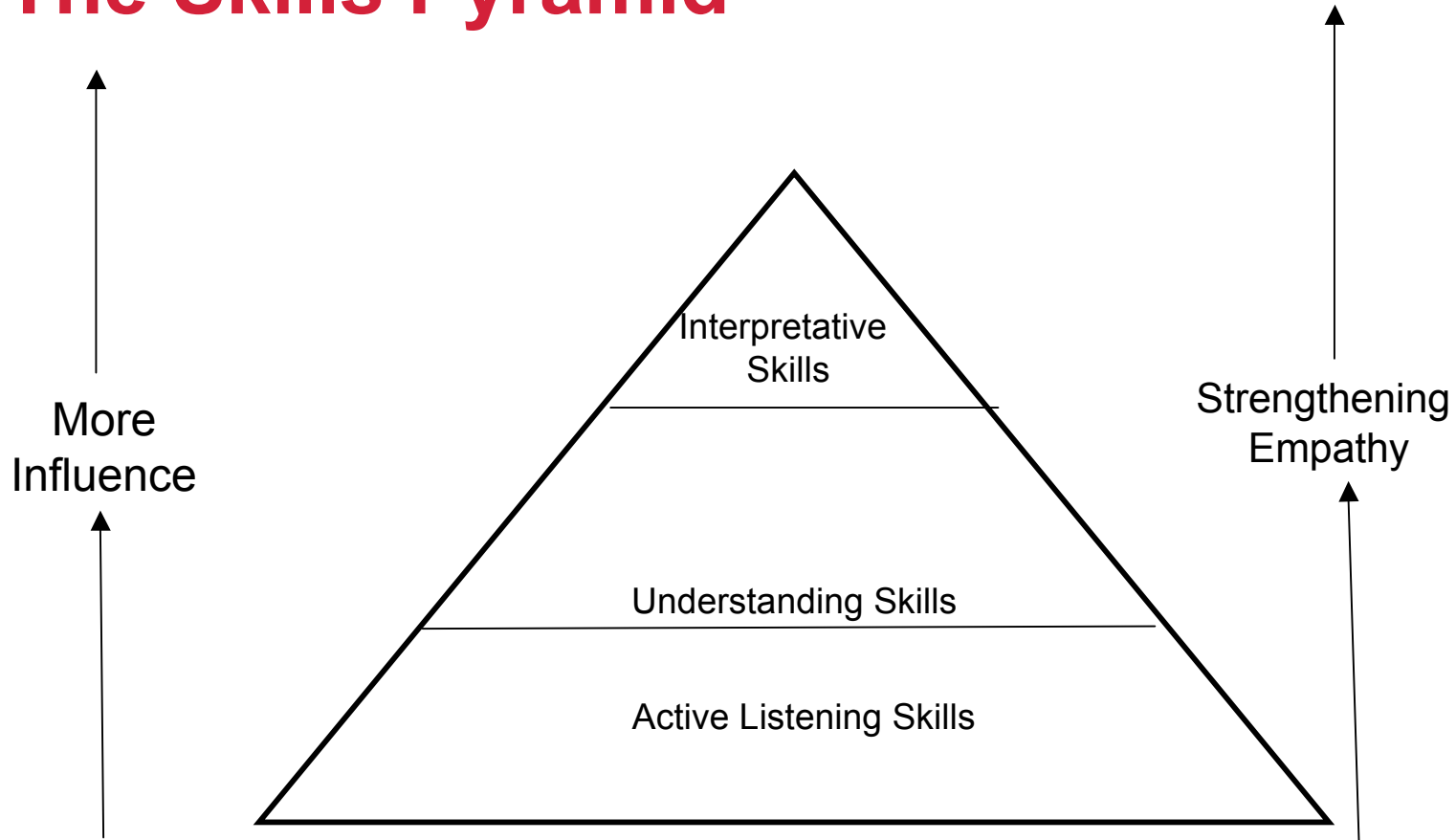
- Process research can be measured in terms of individual performance. Call feedback from line managers, one-to-one feedback from Advisers and call monitoring via a call recording system, GEMINI, all contribute to this research. GEMINI enables the immediate review and assessment of individual career counselling sessions. It also offers a means of identifying where client outcomes could be altered and improved on reflection by the individual and via appraisal by the peer group.

# How outcomes have been measured in CAS (2)

- Team performance outcomes are measured by means of analysis of statistics in relation to Key Performance Indicators, set by the Learning and Skills Council. An electronic call record form captures suggested outcomes for callers, such as whether the caller was referred to education provision, job vacancy information, labour market intelligence or other matters.
- Outcomes research was measured by way of external Post Helpline Research (PHR), undertaken by an independent PHR company engaged by the Learning and Skills Council. This has typically taken place six months after the most recent telephone counselling interview.
- Individual Advisers have the means of recording immediate feedback via a feedback form. This has been used to record both praise and criticism and is a measure of anecdotal feedback.



# The Skills Pyramid



*Ali and Graham (1996)*



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# Skills Pyramid

**Active Listening** - listening to the content, how is it said, possible meanings behind the words, feelings expressed

**Understanding skills** – restating, summarising, paraphrasing, using open questions

**Interpretative skills** – immediacy, self- disclosure  
( *Interpreting the issues with the client*)

*Ali and Graham 1996*

# Fundamental skills (1)

- Self Awareness
- Active listening
- Establishing structure, support, rapport
- Managing expectations, contracting
  - The impulsive client
  - The unprepared client
  - The distracted client

## Fundamental skills (2)

- Ability to use IT resources, for instance Labour Market Information
- Treating the client as an individual
- Ethical practice (does telephone guidance develop a more equal relationship between adviser and client? Is it less judgemental?)
- Dealing with people of all different types/backgrounds
- Active engagement in CPD

# Intermediate skills: use of the voice, what is said, unsaid

*‘The voice is a powerful tool.’*

*‘found that speaker and listener are transmitting a wider range of signals than they are usually conscious of. Voice tone conveys a wealth of feeling with accuracy – warmth and interest, enthusiasm, concern, query, puzzlement.’* (George 1998 p.109 and George (p.109) citing Rutter and Robinson

# Intermediate Skills: intuition

Six areas related to intuition: skilled performance without reflection; unconscious learning; judgement without justification; heightened sensitivity to detail; creativity and rumination. Claxton (2008)

"Heightened sensitivity" to cues is particularly pertinent to telephone guidance.

## Intermediate skills: High level of knowledge of and engagement in theory

*'As a Career Coach I usually take the narrative approach especially at the beginning of the interview. I encourage my client to open up to and tell their story and try to work out a strategy in order to help. My strategy will vary depending on the needs of my client. For example I may use the narrative approach with elements of Cognitive Information Processing (CIP) (Sampson 1992) for clients who have not worked for some time. The elements of CIP approach I may use on these occasions include the encouragement of client self knowledge and tips or perhaps demonstrations on how to begin researching occupational information. For clients whose stories do not seem to add up, I may take Egan's (2002) Skilled Helper approach and work with clients on any potential "Blind Spots".'*

# Intermediate skills: Knowledge and understanding of clients with special needs

Some special issues with telephone guidance:

- Physical disabilities that may be immediately obvious to a face to face practitioner are not evident to telephone advisers
- Adults with some conditions benefit from the telephone service, those who cannot leave their home, for instance those with agoraphobia, with physical disabilities which may mean attending a face to face careers interview elsewhere very difficult
- Telephone services can also attract those with insufficient confidence to go to a guidance centre





# Advanced and interpretative skills : telephone issues, enhanced listening skills

- The anonymity of telephone enables clients to be very honest. Therefore perhaps telephone guidance practitioners need not be as fearful as face to face practitioners of offering and providing a service that is not required. McLeod (2003 p.441)
- Most clients do not have a problem indicating to an advisor if the interview is not working for them.
- Clients may express anger easier on the phone because the client can not see the counsellor and therefore does not need to be concerned about how the counsellor may react. Rosenfield (1997 p. 88)

# Advanced and interpretative skills : telephone issues, enhanced listening skills – some issues

- As telephone practitioners cannot see the impact of their communication on clients, greater care is needed regarding this communication
- Enhanced listening skills that telephone practitioners tend to develop can be very powerful. The advisor can often hear client emotions in their voice, with tone, pitch, sighs, pauses, but the advisor cannot see the client and cannot observe silent tears
- The telephone practitioner may not have as much opportunity to attempt to rectify the situation as a face to face practitioner. Telephone clients can just hang up at any time, possibly leaving the advisor feeling bewildered and distressed.

# Advanced and interpretative skills : Managing emotional issues

- The release of emotions tend to occur at a far earlier stage in the telephone relationship in comparison with face to face relationships Rosenfield (1997)
- The emotions expressed may be far deeper than the client might display if sitting in the same room as the counsellor, (Rosenfield 1997 p.28).
- Perhaps the view such as Egans (1994 p.176) that reluctance to challenge is better than being too eager challenge is even more pertinent when working on the telephone
- The immediacy of the telephone service and the fact that clients are calling from their home can also result in clients exposing deeper emotional outrage.

# Advanced and interpretative skills : Managing emotional issues

*‘Telephone counsellors are required to enter into the personal worlds of people actually in the middle of a crisis, and are thereby exposed to strong emotions’.*

McLeod (2003 p. 440)

# Advanced and interpretative skills : managing emotional issues

Clients choosing telephone guidance over face to face guidance may have significantly different needs:

- A very strong argument that the relationship between the client and the professional is more important than expert knowledge of the professional Williams (1998)
- *'Less effective counsellors focused primarily on the caller's emotional concerns ..... paid little attention to practical issues'* Bobevski et al (1997, p. 245)
- Maybe those clients who chose distance guidance over face to face guidance may require or prefer a more practical approach.

# Advanced and interpretative skills : Creativity in Telephone Guidance

Good guidance is a creative act, or ideally, an encouragement for a client to act creatively in the face of their problems. 'Confidence in creativity is the hallmark of the advanced professional practitioner.'

- In many cases on a national helpline, Advisers may face problems that are difficult to conceptualise and resources are inadequate.
- Because the interaction is at a distance and one of, maybe, many short or long interactions, this can take impetus and commitment away from the reality of making things happen.
- There are also a multitude of procedures and tools, distractions. It takes ingenuity to adapt and tailor materials to fit the messy and non-standard.

# Advanced and interpretative skills : Challenging the client

The ability to challenge effectively, confidently and constructively is challenging in any interaction, the additional factor in telephone guidance is the lack of instant visual feedback to the challenging remark. A typical reaction from a client may be silence, and so the advanced practitioner is able to manage and allow for silences, anger and speech patterns that become changed when the client reflects and internalises the challenges raised.

# Advanced and interpretative skills : challenge

Kidd, (2006, p.93) states *‘Counsellor interventions which challenge or confront clients’ beliefs are usually only appropriate some way into the counselling process and should only be attempted once a trusting relationship has been established’*



# Advanced and interpretative skills : Achieving a balance between organisational culture and client and Coach needs

- An advanced skill for the telephone advisor is the ability to take a strategic view of the organisation, their own professional practice and their continuing professional development, and maintaining a balance between own, organisational and client needs – is this the same as face to face guidance?
- Easy to feel pulled in different directions by the forces exerted on telephone advisors as career practitioners with the tensions heightened by the contact centre environment.

# Advanced and interpretative skills : special features?

Contracting and ascertaining client needs:

- Sophisticated use of ground rules, not only at the start of an interview but referral to them throughout the interview
- Empowering the client
- Callers encouraged to ask questions, disagree with the adviser about how the interview could progress
- Practitioners presenting their role as a facilitator, and encouraging the caller to set priorities – thus including the caller strongly
- Effective use of a series of questions, using language accessible to the client

# Advanced and interpretative skills: what is distinctive about telephone guidance?

Excellent practice may include high level of some of these:

- Questioning
- Exploring ideas
- Reflecting back
- Prioritisation of discussion
- Full engagement of client
- Offering the client a good rationale for asking challenging questions

# Advanced and interpretative skills: what is distinctive about telephone guidance?

- Impartial
- Supportive
- Motivating and empowering the client
- Challenging summarising
- Professional style of communication
- Challenging the client's ideas and assumptions sensitively

*Are these different from face to face guidance?*

# Advanced and interpretative skills: what is distinctive about telephone guidance?

Some useful techniques are particularly valuable

- Brainstorming
- Creative questioning
- Use of metaphors
- Comparisons of job pairs
- Networking
- In-depth focus on past experiences

# Advanced and interpretative skills: what is distinctive about telephone guidance?

- Thorough discussions on decision making
- Clarifying the caller's learning styles and then using this with them through visualisation techniques
- Making questions meaningful for the client

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# Your thoughts and questions?

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