ENGAGING WITH EMPLOYERS

Delegate pack
Foreword

Information, advice and guidance (IAG) services are an essential part of improving the nation’s employability and skills.

Effective IAG helps adults make well-informed decisions about selecting, accessing and using the wealth of learning, training and career development opportunities available in the UK today.

Delivering IAG in the workplace is an effective and efficient means of reaching those adults who could make use of IAG. The results of good workplace IAG can benefit employers and employees alike.

But reaching out to employers can be a daunting prospect and demands much of IAG professionals. As an IAG practitioner it’s your job to make sure that when you deliver workplace IAG you have the knowledge, skills and confidence to do an excellent job.

This Engaging with Employers Delegate Pack contains the course material for a session on workplace IAG. It is developed in partnership by the Learning and Skills Council (LSC), advice-resources and Business Services, part of Connexions Lancashire.

An Engaging with Employers training day has four key learning objectives. It should enable you to increase your confidence to:

- make contact with a wide range of employers and employer intermediaries, eg Skills Brokers, in your area
- handle telephone calls and meetings with employers confidently and professionally
- develop positive relationships with employers
- increase the take-up of IAG services within your locality.

You can use some of the techniques suggested in this document within any IAG service to obtain the following:

- local labour market information (LMI)
- job vacancies
- job studies
- additional services, for example, work experience placements.

Your Delegate Pack gives you the outline of the course, along with a range of additional resources and references that you may find useful in your work.

To get the best from your day, you should:

- make sure that you do any pre-course preparation requested by your trainer
- participate fully in the training and activities offered
- use your Delegate Pack to make relevant notes: the more information and ideas you add, the more valuable your pack will be as a resource
- network with other course delegates to find out about their views and experience
- ask your trainer (following any house rules) if you are unsure about anything.
# An outline timetable for your training day

<table>
<thead>
<tr>
<th>Topic/activity</th>
<th>Timings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>10 minutes</td>
</tr>
<tr>
<td>Welcome</td>
<td></td>
</tr>
<tr>
<td>Housekeeping</td>
<td></td>
</tr>
<tr>
<td>Ice-breaker activity</td>
<td>5 minutes</td>
</tr>
<tr>
<td>Aims and objectives of the day</td>
<td>10 minutes</td>
</tr>
<tr>
<td>Review key learning objectives</td>
<td></td>
</tr>
<tr>
<td>Working together</td>
<td>5 minutes</td>
</tr>
<tr>
<td>Best use of time, Delegate Packs, questions, etc</td>
<td></td>
</tr>
<tr>
<td>1. Identifying your target audience</td>
<td>20 minutes</td>
</tr>
<tr>
<td>Who do you need to speak to and how can you find them?</td>
<td></td>
</tr>
<tr>
<td>2. Be prepared</td>
<td>30 minutes</td>
</tr>
<tr>
<td>BE – DO – HAVE</td>
<td></td>
</tr>
<tr>
<td>Gaining confidence and competence</td>
<td></td>
</tr>
<tr>
<td>BREAK</td>
<td>15 minutes</td>
</tr>
<tr>
<td>3. A positive approach</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Making a good first impression and building rapport</td>
<td></td>
</tr>
<tr>
<td>4. Cues and clues</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Listening, empathising and effective questioning</td>
<td></td>
</tr>
<tr>
<td>LUNCH</td>
<td>1 hour</td>
</tr>
<tr>
<td>5. Working together to win</td>
<td>25 minutes</td>
</tr>
<tr>
<td>Understanding barriers and breaking them down</td>
<td></td>
</tr>
<tr>
<td>6. Building professional partnerships</td>
<td>10 minutes</td>
</tr>
<tr>
<td>How to conduct successful meetings with employers</td>
<td></td>
</tr>
<tr>
<td>7. Delivering your IAG session</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Practical tips and guidance for top sessions</td>
<td></td>
</tr>
</tbody>
</table>
8. Effective action plans
   Good action plans for better outcomes

9. Evaluation
   It's all about progress...

10. Plenary
    Discussing outcomes, feeding back and evaluating the day

After the day

After you have attended this course, do ensure that you continue your training in an informal way by making sure that you:

- exchange contact details with and continue to support other participants
- continue to think about how you actually use the information and skills you have learned.
### Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Pre-course activity</td>
</tr>
<tr>
<td>1</td>
<td>Identifying your target audience</td>
</tr>
<tr>
<td>2</td>
<td>Be prepared!</td>
</tr>
<tr>
<td>3</td>
<td>A positive approach</td>
</tr>
<tr>
<td>4</td>
<td>Cues and clues</td>
</tr>
<tr>
<td>5</td>
<td>Working together to win</td>
</tr>
<tr>
<td>6</td>
<td>Building professional partnerships</td>
</tr>
<tr>
<td>7</td>
<td>Delivering your IAG session</td>
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<tr>
<td>8</td>
<td>Effective action plans</td>
</tr>
<tr>
<td>9</td>
<td>Evaluation</td>
</tr>
</tbody>
</table>

### Appendices: Additional resources

| A | Pre-course activity: an example | 34 |
| B | Ice-breaker: People Search | 37 |
| C | Maximising impact | 38 |
| D | Methods for overcoming barriers | 39 |
| E | Types of concern | 41 |
| F | Influencing | 42 |
| G | The technique of appointment making | 43 |
| H | AIDA – at your service! | 44 |
| I | Working with trade unions | 46 |
| J | Optional case studies for ‘delivering the session’ training | 48 |
| K | Establishing an employer’s needs: some useful questions | 49 |
| L | Constructive questions for advice sessions | 50 |
| M | Evaluation proforma: employers | 51 |
| N | Evaluation proforma: clients | 52 |
| O | The reflective adviser: a record sheet | 53 |
| P | Headings from a draft protocol produced in Yorkshire and the Humber | 54 |
| Q | References | 55 |

Delegate Baseline Sheet 56
Pre-course activity

Before you attend the training, you will need to complete a pre-course activity. The activity will involve thinking through a number of issues relevant to IAG in the workplace, and will help you get the most out of your time on the course.

You can find a possible pre-course activity at Appendix A at the back of this pack. This activity is based on an imaginary legal firm called Robinsons Solicitors.

However, your trainer will advise you whether you should use this activity or an alternative. If they choose to use something different, they will supply it to you with the details you need well before your course takes place.

Bring the results of your pre-course activity to the training day as you will need your notes and observations for a further exercise.
1. Identifying your target audience

By the end of this section, you should be able to:

- focus on the networks you can use to build a contacts list
- identify and locate employers you need to contact.

Until now, provision of information, advice and guidance (IAG) in the workplace has been limited. With great opportunities for an exciting array of relevant and constructive work-based learning, advisers can now help employers ensure that their employees and their businesses get the best possible IAG.

🌟 Activity – Who to contact?

This activity aims to help you build a useful contacts list of target employers.

Working in groups, compile a list on your flipcharts containing:

- existing contacts and networks
- agencies, organisations (eg schools, community centres, newspapers)
- publications and written resources (eg newspapers, local ads).

You have **five minutes** to complete the task.
Your trainer will then bring the groups together to discuss the results.

There will then be a follow-up question. Everyone can offer their answers for the trainer to record:
**What sort of information might you learn about local business needs?**

The information you discover will help you to get a clear picture of local patterns of recruitment, retention and training. It will also help you understand what particular employers and their employees need.

Be sure to record all your contacts with employers and their staff on a central database. This allows the tracking of any local trends in IAG take-up.
2. Be prepared!

This section should prepare you to:

- feel more confident about approaching employers
- define the features and benefits of your offer
- collate the information you need for your initial contacts.

Before you even think about contacting an employer, remember these three words: Be, Do, Have...

**Step 1: BE – confident**

**Step 2: DO – your research**

**Step 3: HAVE – information to hand**

It’s essential to go through these steps before planning your approach and contact. Let’s explore these three steps a little further.

**Step 1: BE – confident**

When approaching an employer/organisation, be confident in your ability and what you have to offer. Know why you’re making contact, know your services or products well and avoid making preconceived judgements about what your client might need.

**Understanding what you can offer**

Make sure you get to grips with:

- yourself – your initial contact with the employer will be the first impression they have of your products and services. First impressions count, so make it a great one! Think carefully about how you will behave and what you will say when you first meet
- your organisation – what do you do? What are your aims and mission? What support can you offer?
- your products and services – what are you promoting to this employer?

To best present yourselves, your organisation and your services it’s important to be clear about the **features** and **benefits** of your offer.

Benefits are powerful selling points. Clients always want to know ‘What will I gain?’ and ‘How will I benefit?’ However, you need to know the underlying features of what you are trying to promote so that you can be clear about its benefits.

People make their decisions in a variety of ways: some use hard logic, some are intuitive and go with the ‘feel’ of it, and some use both approaches to varying degrees.
For IAG, benefits will probably be easier to promote than features, but always make sure you’re clear about both.

Features are the characteristics and components of a product or service. For example:

- What is IAG?
- What is on offer?
- What can it achieve?
- Where are you based?
- What is your background?

🌟 Activity – Features and benefits

This three-part activity can be done in small groups, recording your answers on flipcharts. Make good use of your time: you have just three minutes to think of answers to each question!

❓ Questions

(a) List the features of the services/products you are offering to employers in your area.


Benefits are the ways in which the employer/employee will be better off after using the product or service.

(b) List the ways in which an employer could benefit from your service.


(c) List the ways in which an employee and their employer could both benefit.


The 3 + 3 strategy is a useful method for prioritising features and benefits to a given employer. Begin by evaluating every aspect of your offer (product, cost, delivery and support) and choose three factors you think should most benefit this particular employer. (For example, these factors might be your proven past performance as a supplier of IAG, your extensive knowledge of training in the employer’s location, or your impartiality.)

**Follow-up**

These spaces are for you to record your ideas and answers to the questions raised by the 3 + 3 strategy. You can complete these later on as a useful follow-up exercise after you have finished the course.

Next, look carefully at your offer from a different perspective. Choose three worthwhile factors unlikely to be matched by other companies. (For example, you might decide on your proven expertise; local relevance or excellent staff.)

Get rid of any repeated features/benefits and then put the factors into a prioritised list, starting with the most important. You then have a clear list of features and benefits with which to interest and engage the employer. However you present these, you must make these key selling points clear, bold and obvious.

Having a clear idea of how you can help a client will give you confidence and help make a good impression.
Step 2:  DO – your research

It’s essential to prepare well for your first contact with a client. Remember that you’ve got to show the employer how you can help them improve their employees and their business. It’s not about your own targets (eg ‘We have to get people up to a Level 2 qualification and you could help us do that’).

🌟 Activity – Do your homework!

Imagine you are about to telephone or visit an employer for the first time. Working on your own, write down six ways (you can phrase these as questions if you prefer) that would help you prepare for that contact.

1. 
2. 
3. 
4. 
5. 
6. 

Being prepared for each contact will help you quickly build a good rapport with employers.

Appendix C contains further tips you may find useful at this stage.

Step 3:  HAVE – all the information you need to hand

For each initial contact meeting or telephone call, decide what materials and prompts you will want to have with you. For example, you may need your diary, handouts, notes or perhaps a script to remind yourself of what you want to say.

❓ Questions

(a) What sort of information might you need if you are making a telephone contact?

(b) What sort of information might you need if you are cold-calling in person?
3. A positive approach

By the end of this section, you should be able to:

- describe the factors that contribute to a good or bad first impression
- plan a well structured first conversation with an employer
- explain how non-verbal signals affect telephone conversations
- describe how non-verbal signals affect face-to-face meetings.

First impressions

However you plan to contact an employer, it's important to think in detail about your approach. It takes just three seconds for others to formulate their first impression when we meet or speak for the first time. Remember – the first impression you make will give employers a lasting image of your organisation and your offer.

Questions

Think about a time when a company made a really good impression on you:

(a) over the phone – what was it about the attitude of the person that you liked?

(b) face to face – what factors made the interaction successful?

Maybe it was something about the way the person empathised with you or showed an understanding of your situation or need? Or perhaps you can identify other factors.

In the space below, note down ways of making a positive impression on your new contact.
Most of us feel at least slightly nervous when making a new contact, especially if it’s important to us. A useful way of easing your initial conversation with a new contact is to plan what you’ll say when you pick up the phone or arrive in the MD’s office.

Having a plan will give you extra confidence and help you make sure that you come across as a knowledgeable and positive professional. The script template below will help you achieve this.

The script is not something you’ll read when on the phone or visiting, of course! However, as when learning to drive or performing in a play, it helps to rehearse the process thoroughly first.

**First contact with an employer: a script template**

<table>
<thead>
<tr>
<th>Structure</th>
<th>Your script/instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Greet and identify</strong></td>
<td></td>
</tr>
<tr>
<td>Greet the employer.</td>
<td></td>
</tr>
<tr>
<td>Introduce yourself and your organisation.</td>
<td></td>
</tr>
<tr>
<td><strong>Attention grabber</strong></td>
<td></td>
</tr>
<tr>
<td>Explain what you do and what you can offer.</td>
<td></td>
</tr>
<tr>
<td><strong>A reason to listen</strong></td>
<td></td>
</tr>
<tr>
<td>Briefly explain the benefits of them giving up time to speak with you about xxx.</td>
<td></td>
</tr>
<tr>
<td><strong>Produce a response</strong></td>
<td></td>
</tr>
<tr>
<td>Fix a date and time to visit them and progress to the next level.</td>
<td></td>
</tr>
<tr>
<td><strong>Close on an upbeat note</strong></td>
<td></td>
</tr>
<tr>
<td>Have you successfully fixed an appointment?</td>
<td></td>
</tr>
</tbody>
</table>

**Style**

- **Good morning/afternoon.**
- I’m xxx from xxx.

**Attention grabber**

Cover your USP (unique selling point). Refer back to 3 + 3 strategy. Or say ‘I’ve heard you’re the best person to speak to about xxx.’

**A reason to listen**

Promote the benefits.

**Produce a response**

Try to avoid appointments on the hour or half hour. Go for quarter of the hour instead: it makes you look busy, so you must be worth listening to – and the meeting won’t last long.

**Close on an upbeat note**

YES – confirm in writing too. Or maybe a further call is needed to clinch the appointment?

NO – say you will call again in future, or send more details.
Follow-up

Here’s an extra activity for you to try after you’ve completed the course. Choose one scenario and prepare yourself an introductory script.

Scenario 1. A colleague at Train to Gain has given you a lead into a company interested in staff development.

Scenario 2. You have identified a number of companies who advertise in the local paper/business directory. Consider your focus and prepare an outline script.

Rapport helps you to get along with others at their level. Once you’ve made a good first impression on an employer contact, you need to work on building rapport.

Activity – Get the ball rolling

Working in pairs, suggest ways of building rapport with an employer and discuss with your partner how successful they might be. Record your answers on your flipchart. You have just three minutes for this activity.

Body language matters!

According to Albert Mehrabian, our non-verbal communication expresses about 55% of what we mean; 38% depends on the tone of the voice and just 7% depends on the actual words that we speak.

Therefore, it is vital to make sure that our body language and tone give the same messages as the words we use.
Activity – Getting the nod

Note down in the boxes below what the following gestures suggest to you. Do other delegates have different interpretations? Note these down too.

<table>
<thead>
<tr>
<th>Gesture</th>
<th>Message(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nod head</td>
<td></td>
</tr>
<tr>
<td>Rub palms</td>
<td></td>
</tr>
<tr>
<td>Extend hand</td>
<td></td>
</tr>
<tr>
<td>Shrug shoulders</td>
<td></td>
</tr>
<tr>
<td>Raise hand</td>
<td></td>
</tr>
<tr>
<td>Thumb down</td>
<td></td>
</tr>
<tr>
<td>Pat on the back</td>
<td></td>
</tr>
</tbody>
</table>

Neuro-Linguistic Programming (NLP) suggests that mirroring positive body language helps to build rapport. This mirroring process shows your contact that you understand and agree with their message.

Non-verbal communication and the telephone

When using the telephone, the non-verbal signals you give count more than when you’re talking face to face.

Consider your tone of voice, ie the way you say something. Tone of voice makes up for the loss of visual contact and is even more important than the words we say.

For example, your tone of voice tells the listener if you are:

- enthusiastic or bored
- tired or alert
- aggressive or calm.

Although the person you are speaking to cannot see you, they can tell if you are smiling. Smiling relaxes the vocal cords making us sound more friendly and relaxed. So even when making a phone call, don’t forget to smile!
If you are listening to someone you can see, you’d show agreement by nodding. When the person you are talking to cannot see you, it is important to share ‘verbal nods’ with them. For example, you need to acknowledge what they say with utterances like:

- ‘I see’
- ‘Yes’
- ‘Ok’
- ‘Right’
- ‘Mmm...’

Telephone calls have some advantages over face-to-face conversations:

- you can get to the person you want to speak to quickly
- telephone conversations are usually much shorter
- they are easier to control because the conversation normally involves just two people
- barriers are less easily formed because there is no visual contact.

However, there are disadvantages too:
- you may be calling at an inconvenient time
- they may be doing other things besides listening to you
- the listener may have difficulty concentrating on what you are saying due to competing background noise.

 Handy tip

Employers are generally very busy individuals. When starting a phone conversation, always check that the employer has time to speak to you.

Check out the additional ideas and hints on making a positive approach at Appendices E and F.
4. Cues and clues

By the end of this section you should be able to:

- identify ways of improving your listening skills
- describe situations from different perspectives
- identify the features of successful questions in IAG.

The employer has acknowledged your approach and you are meeting them for the first time. How can you help to ensure everything goes well?

Be an active listener!

It might sound obvious, but listening carefully to the employer will help you to recognise their needs and gather relevant information.

Lean forward slightly, relax a little, smile appropriately and nod encouragingly.

As you listen, you will pick up clues about their thoughts, emotions and concerns. When employers talk about things that really matter to them, their language changes: it may become more direct and perhaps more vivid. They may illustrate their arguments with examples. These signs give you clues about what really matters to them and indicate areas that need further probing.

Consider this meeting from the employer’s point of view.

By doing this you are acknowledging that not every employer you visit is going to view the IAG in the workplace as we do.

Activity – Taking a view

To fully understand the employer’s position, you need to consider the meeting from a different angle. Working in threes, consider an initial contact meeting with an employer.

Each assume one of the following perspectives and explain to your two colleagues how you see the role of IAG in the workplace.
Discuss what you discover about the different perspectives and how they might affect the future of your working relationship.

There is no ‘right’ perspective to the meeting, only an opportunity for the employer and the adviser to build understanding and find a productive route forwards.

By putting yourself in the shoes of a detached outsider it becomes easier to achieve a mutually positive outcome.

🌟 Activity

Look at the Robinsons Solicitors case study (see Appendix A).

What might the Senior Partner at Robinsons Solicitors be thinking about the visit?

You have listened to the employer and considered the different perspectives. Now you need to briefly summarise the information the employer has given you (this will tell the employer how closely you’ve been listening!). You can then ask more probing questions that arise from what you’ve heard.
Questions

(a) What questions would you have asked the employer (ie Senior Partner at Robinsons) at your first meeting?

(b) Can you suggest some common features of a successful question?

As advisers we tend to ask open questions as we are continually seeking to elicit information and establish rapport.

Some questioning vocabulary is however more effective than others.

For example, questions beginning with `why` can provoke confrontation. One reason for this is that `why` appears to demand that the listener justifies their position, so making them feel threatened and defensive. Questions beginning with `what, who, when, where` and `how` are more likely to be constructive and productive.

Different types of questions do different jobs. Here are some examples:

- to obtain simple facts (eg Who is responsible for...?)
- to extract detail (eg What prevented you from meeting the deadline?)
- to interrogate (eg Why were you late for our appointment?)
- to get an opinion (eg Do you think this was a sound decision?)
- to get consent (eg Can I share this information?)

Closed questions (ie those requiring only a `yes` or `no` answer) are not good for building rapport because they provide very limited feedback and give the impression that you are not interested in the listener's needs.
**Activity – Open or closed?**

Open questions elicit far more information than closed questions. Working in pairs, change these closed questions to open ones. You have **five minutes** in which to complete this task.

(a) Is that a new piece of equipment?

(b) Are you interested in our service?

(c) Can you show me your training plan?

(d) Are all your staff trained up to Level 2?

(e) Are you happy with the performance of your company?

(f) Is there a Union Learning Representative active in your company?
5. Working together to win

By the end of this session you should be able to:

- discover an employer’s underlying concerns about IAG
- respond effectively to employers’ concerns
- negotiate mutually beneficial IAG solutions.

Uncovering barriers

Sometimes, employers may view the offer of adviser intervention as threatening rather than beneficial. This response may have many effects: the employer may refuse you the time for a meeting or may state that their employees ‘would not be interested in that kind of thing’. Although these reactions may seem negative, they do offer an opportunity to engage an employer in conversation about the company’s real needs. Appendix E lists different types of concern that employers may have.

Employers may have failed to understand the purpose of your visit. Explain clearly and tackle questions honestly but firmly. The employer who claims their staff ‘would not be interested in that kind of thing’ may actually be saying that they do not want their staff missing valuable production hours to train. A clear explanation of what’s in it for them as employers will help them to make more informed judgements. You may find Appendix F helpful here: it summarises the SCORE technique for developing collaborative relationships.

It is also possible that the employer is negotiating with a Union Learning Representative (ULR) to meet the learning needs of employees and may think that a specialist agency is unnecessary. Check if this is the case before your visit and work with local ULRs to clarify your individual roles and services. The notes at Appendix I give you some useful information on working with Trade Unions.

Become an ally

Listen actively and ask questions that establish the background and detail of an employer’s problem. What is the true objection? Ask whether the employer has any further concerns about training.

Once you’ve uncovered the employer’s concerns, make it clear that you acknowledge and accept them. By empathising with the employer’s position, you show that you recognise and value their opinion. The employer is now less likely to take offence and prevent progress.

You can find additional ideas for overcoming barriers at Appendix D.

By now you will have developed a platform on which to represent the concept of advice, guidance and training to an employer. The employer’s concerns have presented a context in which to frame your discussions and allow you to dispel fears and pursue your role of providing information about IAG in the workplace.
Moving forward

As the discussion progresses you may well find you are faced with new barriers. This is a positive sign. It shows you have the employer’s interest and they are applying what you tell them to their own place of work. Do not be deterred: acknowledge the employer’s concern, empathise with their point of view and counter their worries with the appropriate benefits. Agreeing upon a course of action takes persuasion and acceptance on the part of both employer and adviser. Be aware that sometimes you have to accept that an employer may not fully engage with the concept of workplace IAG, but may agree to a limited or one-off trial before embracing fuller participation. Remember to negotiate and be flexible. A planned concession often pays dividends.

Activity – Beating the barriers

Barriers fall into five major categories:

<table>
<thead>
<tr>
<th>NEED</th>
<th>PRICE</th>
<th>FEATURES</th>
<th>TIME</th>
<th>PROVIDER</th>
</tr>
</thead>
</table>

Your group will work on one particular barrier category. Discuss and record in the appropriate table below the responses you could offer to help employers see past the barriers.

The NEED:

Employers may simply say ‘We don’t need your service.’

<table>
<thead>
<tr>
<th>Employer’s objection</th>
<th>Your response</th>
</tr>
</thead>
<tbody>
<tr>
<td>I already have a training plan.</td>
<td></td>
</tr>
<tr>
<td>My staff are not interested in training.</td>
<td></td>
</tr>
<tr>
<td>Personnel deals with these issues.</td>
<td></td>
</tr>
<tr>
<td>The ULR has set up a learning centre and provides IAG.</td>
<td></td>
</tr>
<tr>
<td>I don’t need outsiders coming in and disturbing my workforce.</td>
<td></td>
</tr>
<tr>
<td>This is a highly specialised firm: outside agencies can’t help with our training.</td>
<td></td>
</tr>
<tr>
<td>We do all our training in-house.</td>
<td></td>
</tr>
<tr>
<td>We don’t need any training.</td>
<td></td>
</tr>
</tbody>
</table>
The PRICE

Employers are often wary of being ‘sold’ a product and may be sceptical about free information, advice and guidance.

<table>
<thead>
<tr>
<th>Employer’s objection</th>
<th>Your response</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have already allocated my training budget.</td>
<td></td>
</tr>
<tr>
<td>Training costs money.</td>
<td></td>
</tr>
<tr>
<td>I’ve already invested substantially in my staff.</td>
<td></td>
</tr>
<tr>
<td>If I need information I can look it up for nothing on the web.</td>
<td></td>
</tr>
</tbody>
</table>

The FEATURES

An employer may respond negatively to a particular element of your offer.

<table>
<thead>
<tr>
<th>Employer’s objection</th>
<th>Your response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why should I train my staff so they can leave and get a better job?</td>
<td></td>
</tr>
<tr>
<td>HR provides advice and guidance here.</td>
<td></td>
</tr>
<tr>
<td>I can’t see what would be different about what you do and what the ULR does.</td>
<td></td>
</tr>
<tr>
<td>An adviser on site can be very disruptive and could make staff feel unsettled.</td>
<td></td>
</tr>
<tr>
<td>You can speak to my staff, but I want a full report on what they discuss with you.</td>
<td></td>
</tr>
<tr>
<td>I’m not happy about having visitors here: we work in a very competitive marketplace and our research and development are confidential.</td>
<td></td>
</tr>
<tr>
<td>I know what’s best for my workforce.</td>
<td></td>
</tr>
</tbody>
</table>
The TIME

Lack of time is probably the commonest of all blocking tactics. You’ll need to be ready with informed, relevant responses.

<table>
<thead>
<tr>
<th>Employer’s objection</th>
<th>Your response</th>
</tr>
</thead>
<tbody>
<tr>
<td>We are very busy at the moment with a rush order.</td>
<td></td>
</tr>
<tr>
<td>The company is moving next year, maybe then.</td>
<td></td>
</tr>
<tr>
<td>Business has been very slow this year. Perhaps we’ll call you in the new year.</td>
<td></td>
</tr>
<tr>
<td>I don’t know. I need time to think about it.</td>
<td></td>
</tr>
<tr>
<td>I need to talk to the Managing Director first.</td>
<td></td>
</tr>
</tbody>
</table>

The PROVIDER

Employers must have confidence in your credibility, experience and integrity. Overcoming any concern about this is of paramount importance. Never forget that ‘people buy from people’.

<table>
<thead>
<tr>
<th>Employer’s objection</th>
<th>Your response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you have the experience necessary to advise employees in this industry?</td>
<td></td>
</tr>
<tr>
<td>I have dealt with Ace Consultancy in the past and have been very happy with their service.</td>
<td></td>
</tr>
<tr>
<td>I only accept recognised qualifications.</td>
<td></td>
</tr>
<tr>
<td>Why should I give my business to you?</td>
<td></td>
</tr>
<tr>
<td>Why are you any different from/better than any other advice and guidance broker?</td>
<td></td>
</tr>
<tr>
<td>The union representative is doing quite a bit in this area. Are you working with her?</td>
<td></td>
</tr>
</tbody>
</table>

The above objections provide a small sample of the barriers you may encounter when approaching employers. However, most concerns actually reflect an interest in the service you represent, so always look for opportunities to turn negatives into positives.
6. Building professional partnerships

By the end of this section, you will be able to:

- conduct a thorough and planned meeting with an employer
- construct a clear contract for your future work together.

Forming a clear contract

Having established the employer’s needs and dispelled their concerns, you’ll need to clarify your shared objectives. After all, the relationship you are building is a win-win partnership. Remember that you are a guest of the employer: maintain respect for them, their business authority and the company culture. The following nine steps should prove helpful in building a clear and professional contract for your work together:

Step 1. Confirm the purpose of your visit.

Step 2. Make a clear record of the objectives you hope to achieve together.

Step 3. Construct an agreed timescale for your delivery of IAG.

Step 4. Define confidentiality in the context of your services to the company. Be clear about the information that may and may not be shared.

Step 5. Explain what the employer can expect of you and your organisation.


Step 7. Explain what you expect of clients.

Step 8. Set clear boundaries for all concerned.

Step 9. Arrange a suitable venue for the IAG sessions.
Questions

(a) What factors should you consider when deciding on a good venue for IAG?

(b) What signals does the choice of venue send out to clients?

Appendix I offers guidance on working in effective partnership with Trade Union personnel.

Handy tip

Remember to check what IAG or training agreements may already be in place (e.g., with a Union Learning Representative).
7. Delivering your IAG session

By the end of this section you will be able to:

- identify the skills of a professional adviser
- describe different models for delivering IAG sessions
- formulate effective questions.

Structure and timing

How do you structure your IAG sessions?

At its simplest, this may be a two-stage approach:

1. Ask questions
2. Give answers

Alternatively you may be able to identify four or five distinct stages, for example:

1. Gather information about client’s situation and needs
2. Explore possibilities – consider possible options, routes, obstacles, consequences etc
3. Decide on the most appropriate course of action
4. Formulate action points
5. Review the plan

If you are a very experienced adviser you may no longer be conscious of the structure you use.

If you are a new adviser you may feel that you don’t have a structure at all.

When working on an employer’s premises, time is especially precious. Your session must have a structure and purpose so that you can use your time efficiently and construct a clear contract.

There may be aspects of the contracting process you can present before the session – eg in a leaflet or in a presentation to all potential clients. It is, however, not enough just to have this information available: make sure that it is absorbed and understood.
Activity – Your skills as an adviser

Get into your groups and then read Joanne’s story below.

Case study – Joanne

When I first started working in businesses it was a bit daunting for me. Before I came into public sector IAG, my only encounter with the private sector was as a fairly low-level administrator.

My first task was to attend a meeting which involved the managing director, HR manager and union rep of a company which was closing. I was there to tell them what we could offer their staff who were being made redundant. Although I wasn’t feeling confident about the meeting I prepared myself mentally, put my suit on and armed myself with information. The meeting was successful and I came out of it feeling that – yes – maybe I did have something to offer them!

I worked as part of a team within the company for about three months offering a range of services to support the staff. This was funded by the local council and nextstep. The employer also made a substantial contribution. I think the management felt as if we were really helping them to carry out their personal obligation to look after the staff, especially as they were so busy with the legalities and logistics.

On reflection, I would say that the skills I used were just the same as the skills I have developed in working with labour market clients. Being able to build relationships with people and show an interest in what they need is really crucial. Being flexible in my working style was key to the success of the project. Time management was important as we often had to fit around the timings of the work day and sometimes staff got pulled away at the last moment. Sometimes advice sessions were quite short and I had to be very focused whilst also making the client feel special and not rushed. Once I had built up trust I felt I could be more assertive and negotiate private time and space. I think the staff and the managers appreciated that we were objective and independent of the situation so they were appreciative of our advice and our undivided attention.

Now I much prefer working on employers’ premises to our drop-in centre in the community. Why? It’s great to get an inside look at how other people work (you could say I am just nosy!), and I like the fact that I am often working in new and different places. The issues faced by the clients are often different and the attitudes can be too. I like the chance to relate to all different levels of people, from the manager to the cleaner. Most of all, I like the fact that I feel so much more confident about it than I did at the start!
Discuss and write down on post-it notes the skills you use in your current roles as advisers. (You can record your ideas below too if you wish.)

Do advisers working on employers’ premises need additional skills? Use post-it notes to record any extra skills that you think of.

Focus and content

When working with employed adults, the focus of the session is likely to be very different from sessions with individuals looking for work, a career change or a learning opportunity.

Here are three useful theoretical models that you might use in your sessions.

**Egan’s Model**

**Current Scenario** – Where are you now?
**Preferred Scenario** – Where do you want to be?
**Solution** – How will you get there?

This model stresses a focus on 'situation' not 'location', ie How can the client improve their situation where they are now (as opposed to exploring what they could do if they moved to another location)?

**GROW Model – A Coaching Approach**

**Goal** – What do you want?
**Reality** – What is happening now?
**Options** – What could you do?
**Will** – What will you do?

(From Sir John Whitmore – Coaching for Performance)

This approach is similar to Egan’s but it focuses the client’s immediate attention on the purpose of the session. There is no need for them to tell their whole story. It can also encourage creative solutions that are not necessarily based upon the past/present situation.
Neuro-Linguistic Programming (NLP)

Setting a well formed outcome can include such questioning as:

- What do you want?
- Where, when, and with whom do you want it?
- How will you know that you have it?
- What do you get out of your current behaviour?
- Would it affect any other areas/people in your life?
- What is stopping you having it already?
- What, specifically, are you going to do to achieve it?
- When?

Creative questions

Using skilful questioning is perhaps the most effective strategy of all. Questions that encourage people to think hard or to see things from a different angle can bring about significant changes.

Appendices K and L give you more useful ideas for constructive questioning.

🌟 Activity – ‘Keepy-Up’ advice session

For this activity, you’ll work in teams of about four people.

Just like the game where a person bounces a football on their knee and tries to keep it up for as long as possible, this activity is the chance for a team of advisers to keep up an effective – and perhaps quite creative – advice session!

The activity brings a sharp focus to different questioning techniques and gives the group the chance to try new approaches and learn from each other.

- One person volunteers to be a client and presents some familiar issues to the group. The client should not seek to be unduly difficult but should respond to useful techniques, eg answer well-phrased questions, consider good suggestions.
- The rest of the group take it in turns to question/advise the client. Generally, each team member will take one or two turns at being the adviser.
- The first adviser questions the client. When they wish to (or when the trainer signals) the next adviser continues with the client.
- The trainer will give a signal when the session ends. The advisers and client can review the success or failure of different questions together.

Please note: The activity should be fun as well as informative: advisers can ‘pass’ if they do not wish to continue questioning.
8. Effective action plans

By the end of this section you will be able to:

- identify the purposes of an action plan
- list the features of a good action plan
- describe the benefits of a good action plan.

By the end of the IAG session you should have all the information you need to construct a suitable action plan.

Why use an action plan?

An action plan has several purposes. It:

- provides a client with a useful record of the completed session and objectives for the future
- maintains clear records for the adviser, the team and the centre
- supplies qualitative and quantitative evidence for audits, ALI inspections etc.

What stops us from making good action plans?

Good practice makes for good action planning – and vice versa. The barriers that hinder action planning include:

- failure to keep good records whilst conversing with/listening to the client
- poor time management
- being unclear about the requirements
- the client session doesn’t fit the usual process
- a lack of thorough, professional practice.

Activity – Good action plans

Get into your groups and write what makes a good action plan on different post-its. You need to think specifically about what good action plans may be and what they must include.
9. Evaluation

By the end of this section you will have the tools to:

- reflect on your professional practice
- evaluate your work with employers and clients.

It is good practice to evaluate the effectiveness of any service or intervention that you provide.

Careful evaluation allows you to:

- understand what has worked well and what has not
- improve services for the future
- compile case studies to use when promoting your service.

As soon as your delivery is complete, evaluate:

(a) your work with the client
(b) your service to the employer
(c) your own performance.

Question

What strategies might you use to carry out your evaluation?

At Appendices M and N, you can find useful evaluation pro formas to help you improve your own practice and that of your organisation.

Reflection on our own professional practice is an important part of good evaluation. You’ll find a handy form for recording your reflections at Appendix O.
A. PRE-COURSE ACTIVITY: AN EXAMPLE

Case study: Robinsons Solicitors

Robinsons Solicitors, a large town centre practice, has always invested in training but mainly in the professional development of its lawyers. Since the establishment of the company in 1962, business has increased by 300%.
(a) Why might you make initial contact with this employer?

(b) What needs do you think this employer and the workforce might have?

(c) What features and benefits of workplace IAG does this employer need to be aware of?

(d) The Senior Partner thinks the training offer is too good to be true. The company’s interest in training has always been dictated by the ‘bottom line’. The Partner also expresses concern over the time that training might demand away from the workplace.
(e) How would you respond to these concerns?

(f) What will be your strategy for engaging this employer in workplace IAG?

So what happened to Robinsons Solicitors?

As a direct result of the IAG process, the company has worked with the training provider to develop an NVQ programme for its junior staff. All employees underwent a full range of training from IT to health and safety, and developed softer skills such as time management and project management.

The Senior Partners anticipate further staff development. They state that the success of the training lay in the two-way plan which effectively combined the training that they wanted and addressed the gaps identified in the training audit.
### B. ICE-BREAKER: PEOPLE SEARCH

Get to know your colleagues here today! Collect signatures from the other delegates who match the descriptors. Each delegate may sign up to two descriptors.

<table>
<thead>
<tr>
<th>Has two brothers</th>
<th>Is a vegetarian</th>
<th>Is wearing jeans</th>
<th>Has changed jobs recently</th>
<th>Has one sister</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wears contact lenses</td>
<td>Likes the theatre</td>
<td>Has four letters in his/her first name</td>
<td>Has a last name that starts with ‘S’</td>
<td>Is wearing a suit</td>
</tr>
<tr>
<td>Drives a 4x4</td>
<td>Likes to read thrillers</td>
<td>Knows what $\pi$ is</td>
<td>Has a dog</td>
<td>Has brown hair</td>
</tr>
<tr>
<td>Been skiing in the last year</td>
<td>Uses public transport</td>
<td>Has children</td>
<td>Has blue eyes</td>
<td>Likes Chinese food</td>
</tr>
</tbody>
</table>
C. MAXIMISING IMPACT

How can you maximise your impact as an adviser?

Consider the dripping tap effect. Our role is to provide information, advice and guidance (IAG) in the workplace.

Sometimes however clients need to be convinced that this will benefit them.

To help the client respond to this new information we need to adopt a process of repetition – a repeated word or phrase cunningly hidden in our approach.

Ideally this process of repetition will not be obvious, but will instead be registered in the subconscious.

‘Dripping water will erode the entire mountain, possibly without the mountain noticing.’

Repetition gives time for the penny to drop and leads to understanding. So after repeated exposure, the concept of workplace IAG becomes clear and understandable.

For example, some people like to do things several times before making up their minds. Think about when you last bought a pair of shoes and the process you went through. Did you try them on repeatedly and maybe go to another shop to make sure before returning to the original shoe?

This is not unusual: many people have to repeat things before they are convinced. Three repetitions of a word, a phrase or an experience can be very powerful.

‘Location, Location, Location!’

Now we are aware of the power of repetition we must decide what words or phrases an employer will recognise as valuable or desirable.

What words do you think an employer may subconsciously listen for?

By actively repeating positive words and phrases we can make an innovative IAG idea become familiar.

Equally, friendly repetition creates familiarity and therefore a positive platform on which to discuss workplace guidance.

Reinforcing our suggestions by gentle repetition embeds these positive ideas in the client’s subconscious.

‘Repetition, Repetition, Repetition!’
D. METHODS FOR OVERCOMING BARRIERS

DIGGING TECHNIQUES

Use these to uncover underlying resistance:

‘Apart from xxx. What then?’

‘Suppose xxx would not be a major factor. What then?’

‘Let’s assume that xxx would not be a consideration. What then?’

‘And if that were not so?’

AVOID ‘YES-BUT’

Avoid provoking potential customers. Get to the point where you are in agreement and then carry them the rest of the way. As soon as a client hears ‘yes’ they expect to hear ‘but’: once they hear ‘but’ they’ll treat the answer as though it were a contradiction.

Some alternatives are:

And...

However...

On the other hand...

Look at it this way...

There’s another aspect...

Also there’s the question of...

Furthermore...

In addition to this...

Here’s a thought...

What about ...?

And of course...

There is of course a further viewpoint...

THE BOOMERANG METHOD

An objection can sometimes lead to a positive reason for buying into an idea. Get your client to agree with a statement you make and then credit them with having ‘wisely’ said it!

THE PLAYING-FOR-TIME METHOD

If you need more time, repeat the client’s words to make sure that you have interpreted the objection correctly. This will give you more time to think of an answer. Then ask the customer to explain more fully.

Break the objection down into small pieces. When people have to analyse their own objections, they often realise they haven’t given them much thought and withdraw them.

RE-STATEMENT TECHNIQUES

Often used on cost and timing objections.

‘It’s too expensive’ RE-STATE IT (remember you cannot answer a statement, but you can answer a question, so formulate a question you can answer) eg ‘So what you are saying in effect is ‘how can I afford to take on a young person given all my other rising costs?’

Then proceed to answer the question.

FORESTALLING METHOD

Answering an objection before it is voiced keeps the tone positive.

COMBINING SEVERAL OBJECTIONS

Objections are weaker when they’re grouped together. Positive benefits are also weakened by being grouped, so spread them out.
D. METHODS FOR OVERCOMING BARRIERS

COMPARISON

Comparisons are often better than a direct answer: use an analogy.

TESTIMONIALS

Whose judgement does your customer trust? Testimonials can be powerful but select them carefully.

WHEN AND IF

‘When’ gives a stronger start to your sentence than ‘If’, eg ‘When you take advantage of this opportunity...’

ANSWERING CONCERNS AND FEARS

Be respectful – even if you don’t agree with their views

Stay calm – others can tell if you are rattled and many enjoy it

Be modest – don’t offer personal opinions if they are out of place

Demonstrate your understanding – of their business

Show manners – don’t contradict

Be brief – don’t ramble on

Empathise – put yourself in their shoes and discover the REAL objections

Be responsive – don’t fob them off with half truths or part answers
E. TYPES OF CONCERN

Change – fear of doing something they haven’t tried before. So:
- show the benefits of your proposition
- convince them by using case studies of similar situations and where people have been pleased with the results
- they are happy with what they have got – spotlight any potential gaps.

Repetition of a painful experience – an unresolved problem on previous dealings with our organisation.

Don’t ignore this and carry on regardless – sort out the problem first and then go back.

Elimination by saturation – we are too busy, can’t cope etc.

This is probably a put off. Re-identify needs. To overcome this type of objection you will need to have found out a lot about the organisation you are visiting.

Authority – often stated as ‘we will have to think about this’.

Make sure you are speaking to the person who can make decisions.

Time and Timing
- Time – wrong time to call make an excuse and arrange to ring back.
- Timing – it is the wrong time for the product/service – turn it back and ask when would be a good time.
- Or if it is wrong time – come back.

Influence and Pressure – a difficult customer. ‘I want to make my own mind up – I don’t need you telling me what to do’. Ask for help, advice, information and opinions. Wait until calmed down before resuming.

Variance between what we are offering and what the customer wants – often this is an objection we will have created by not identifying needs earlier on in the visit.

Expenditure – could be time or money. As compared to what? Suppose cost were not a factor etc.
F. INFLUENCING

We don’t like the thought that we are ‘selling’ as we have all had negative experiences of salespeople! Try using:

The SCORE technique – a sequence for ‘influencing with integrity’

**Symptoms** – explore. How are things working? What isn’t?
**Causes** – of things not going well
**Outcome** – what would they like instead? Help them see, hear, feel it
**Resources** – discuss/show what resources are available – menus of products/services
 (Know what your contribution/uniqueness is)
**Effects** – of buying into the ideas/resources/menu (which hopefully tie in with their desired outcome)

This sequence develops a collaborative relationship.

**EXAMPLE** of using the SCORE technique

S  What’s happening now? What’s going well? What is not?
   Explore their current needs and wants
C  Causes of what is not going right – eg can’t get the right people
   – Jobcentre Plus keep sending people down but they don’t want to work
O  Desired outcome – what do they really, really want?
R  Resources available
E  Effects of taking specific action – eg what would it be like if they trained a particular staff member?

This model takes people from a present state to a desired state.
G. THE TECHNIQUE OF APPOINTMENT MAKING

Ten key points

1. When asking for your contact, your attitude should create the impression that he or she is expecting your call.

   One way to do this is to say for example ‘Rosie Williams, please’, and even add ‘Noel Gallagher here’.

2. Don’t discuss your business with the receptionist. If you are asked what you want to speak to Mrs Williams about, simply say:

   a) ‘I have been asked to make an appointment to see her.’

   or

   b) ‘It is a business matter and one that I would like to discuss with Mrs Williams. Can you put me through?’

3. Do NOT get involved in a lengthy explanation to your contact’s secretary if you are put through to her. In this case you can try technique a) or b) above or ask if an appointment can be made on behalf of Mrs Williams.

   or

   When you are asked what it is you wish to see her about, try...

   ‘Oh, isn’t she in?’

   ‘Yes’ ➔ ‘Can you put me through please?’

   ‘No’ ➔ ‘When is a good time for me to call her please?’

4. Know exactly what you are going to say before dialling. It has been said that most appointments are lost during the first 60 seconds so you cannot afford to be hesitant at this stage. (A script is useful here.)

5. You must get your contact’s undivided attention and concentration. Remember that the telephone is an impersonal instrument and your words are competing with a wide variety of other matters, to which your contact has the choice of giving his or her attention.

6. Remember that the purpose of your telephoning is to get an appointment. So... keep it brief and do not get drawn into selling your product or service over the telephone.

7. Ask for the appointment ‘early’ and keep asking until you are successful.

8. In your request for an appointment, use the basic close (eg ‘When can we get together?’) or give your contact a choice of alternatives.

   Try different ones each time you have to ask, and to see which one works for you. For example:

   ■ Would you prefer the early or the latter part of the week?

   ■ Do you prefer the morning or the afternoon?

   ■ We can make it 3.20pm on Wednesday or say 10.40am on Tuesday... Which do you prefer?

   ■ Can we make it at 3.45pm on Monday, or perhaps towards the end of the week?

9. When stating alternative times ask for ‘odd’ ones. A customer will often fit you in at these times more readily than at ‘half-past’ or ‘on the hour’.

10. Make a note of the objections you encounter most and plan an effective method of overcoming them.
AIDA is the original sales training acronym dating back to the 1950s. It describes the basic process of how people are motivated.

A – ATTENTION
I – INTEREST
D – DESIRE
A – ACTION

You need to first grab the employer’s attention, if what you are offering is relevant to their needs they become interested, have a desire to know more and want to access it. Once this has been accomplished they will take action to ‘buy into’ it.

ATTENTION
How do we get the employer’s attention?
Again first impressions count, use positive body language (whether it is face to face or on the telephone), so you need to be aware of your initial contact and approach.

1. Before you make any contact: Look for sources of potential employer information – this shows interest and a desire to help.

2. If you have been unable to secure information make use of the time during the visit:
   Last minute (on site) – get there early so you can look around reception – often employers put quality awards, credentials and good news stories out here.

3. Opening statement – know why you are there; make sure you show your interest in their company and their achievements.

Beware of:
Starting with an apology or an excuse
Saying nothing and hoping they will start
Waffle – ‘what’s new, ‘how are things’ etc?

INTEREST
Arouse their interest by being interested.
To do this you should:

- Ask open questions and listen to their answers
- Use ‘what’, ‘when’, ‘where’, ‘how’ and ‘who’
- Talk in the employer’s language
- Find out about needs, priorities, problems, issues etc
- Get feedback – ask questions to get them to talk
- Structure discussion – work to a plan (this is why preparation is very important)
- Take notes

4. Creating a good impression and credibility – you are there as the professional. Make sure you are suitably dressed and have information to hand eg about your service, and your business card.
H. AIDA – AT YOUR SERVICE!

DESIRE
You need to be able to identify and restate information to the employer. Clarify areas of potential agreement and solutions by:

- Presentation of the offer – what can you do?
- Let them see the benefits of the service
- Quote back any point raised under the interest section (i.e., an identified need for our service/young people)
- Benefit/cost/benefit
- Use collaborative language ‘we’ and ‘you’ – avoid the use of ‘I’
- Look for positive signals and deal with objections

ACTION
Turning potential into actuality. Once you have presented what you can do and have made a closing statement – be quiet – don’t keep going over old ground, wait for a reaction and confirmation of or objection to the offer.

To close a negotiation you must follow stages 1, 2 and 3:

The person must understand and trust you
You must choose the right time and way to close
You must be prepared for the final ‘objection’
I. WORKING WITH TRADE UNIONS

THE UNION LEARNING REPRESENTATIVE (ULR)

ULRs are voluntary trade union activists. There are currently 15,000 promoting learning in workplaces. The key functions undertaken by ULRs are set out in the Employment Act 2002 and include:

- identifying learning or training needs
- providing information and advice about learning or training
- arranging learning or training
- promoting the value of learning or training
- consulting the employer about carrying out such activities
- preparation to carry out any of the above activities

The ULR has a role in supporting, coaching and mentoring individual union learners and signposting learning opportunities and other specialist services as required.

Negotiating learning agreements and access to learning and training opportunities with employers is an essential part of the role of the ULR.

The work of the ULR is supported by resources and accredited training programmes provided by their union and TUC unionlearn. A unionlearn IAG module is available to ULRs, and many have also undertaken National Open College Network (NOCN) IAG qualifications and NVQs in advice and guidance.

TUC UNIONLEARN

unionlearn is the learning and skills arm of the TUC, supporting union-led learning and workforce development.

The main functions of unionlearn are:

1. Helping unions to become effective learning organisations by:
   - running programmes for union representatives
   - delivering programmes for regional officers
   - providing strategic support for national officers
   - promoting integrated learning and organising strategies
   - supporting Union Learning Fund and regional projects
   - offering a consultancy service free to unions on funding, project management, quality and standards etc

2. Helping unions to broker learning opportunities for their members by:
   - providing support for unions and their union learning representatives
   - supporting learning centres (including learndirect provision)
   - promoting learning agreements at the workplace
   - establishing websites to advise learners and their union representatives
   - providing a brokerage service to secure quality provision
   - kite-marking provision to a quality standard
I. WORKING WITH TRADE UNIONS

3. Helping unions to have an impact on learning and skills policy by:

- researching union priorities in learning and skills
- identifying and disseminating good practice
- supporting union members on learning and skills bodies
- helping to shape and deliver sector skills agreements through support to union people with Sector Skill Council (SSC) responsibilities

UNIONLEARN AND IAG

unionlearn is developing a model and strategy for the delivery of IAG services to union learners in the workplace. The role of the ULR is central to the model, which builds on active working relationships with IAG providers in the network.

WHAT TO FIND OUT BEFORE APPROACHING AN EMPLOYER

- Is the workplace unionised?
- Which unions have members in the workplace? Is the union engaged in any relevant learning and skills projects?
- Are there ULRs active in the workplace?
- How can they be contacted?
- Is there a learning agreement between the union and the employer?
- Is there a workplace learning centre, and if so, what support services are provided for learners?

WHO TO CONTACT

There is a protocol between the TUC and the LSC about working together, with a specific agreement about Train to Gain.

WHO TO CONTACT

There are six unionlearn regional offices in England, each with a regional manager. Contact details can be found on the unionlearn website by clicking on regional focus and selecting your region.

If you would like to know more about the role of ULRs in delivering IAG or the unionlearn IAG project, contact Joe Fearnehough, jfearnehough@tuc.org.uk or Ian Borkett, iborkett@tuc.org.uk

RESOURCES

The unionlearn website www.unionlearn.org.uk includes further information about the work of ULRs and you can download a range of publications. Further IAG resources will be produced in 2007.

Working together: nextstep and trade unions (LSC, February 2005) can be downloaded from www.lsc.gov.uk

January 2007
These are some case studies you may want to reproduce to get your staff talking about how they would deal with different situations in the workplace.

**Case study 1**
You are working in a company which really values its staff. They were unsure about letting you in as they think you will tell people to leave. In an advice session an employee seems really happy with their job but you personally think they could do better. What do you do?

**Case study 2**
During an advice session an employee discloses some information about the way they have been treated which you think contravenes employment law. What do you do?

**Case study 3**
At the end of a day of advice sessions the manager asks you to tell him what was said in the sessions. He is really interested in improving things for the staff. You have told the staff everything they say is confidential, but you know that it would help if the manager knew how people felt. What do you do?
### K. Establishing an Employer’s Needs: Some Useful Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the most important factor for you in your workforce?</td>
<td>How do you encourage good performance?</td>
</tr>
<tr>
<td>What motivates your staff?</td>
<td>What aspects of your current training programme do you think are ready for review?</td>
</tr>
<tr>
<td>How do you measure the performance of your people?</td>
<td>How do you support staff who identify training opportunities?</td>
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<tr>
<td>How do your staff know they are doing a good job?</td>
<td>Where/how do you find appropriate training for your staff?</td>
</tr>
<tr>
<td>If you could change one thing about your staff as a whole what would it be?</td>
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<tr>
<td>What resources do you need to make your business more successful?</td>
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<tr>
<td>What opportunities for recognition of a job well done are there?</td>
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<tr>
<td>How do you reward your staff for a job well done?</td>
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<tr>
<td>How do you identify strengths and areas for development in your staff?</td>
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</tr>
<tr>
<td>How do you and your staff plan their future development?</td>
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<tr>
<td>How do you identify the training your staff need to do a better job?</td>
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<tr>
<td>How do you see the future of the company?</td>
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<tr>
<td>Have there been any instances when skill shortages have impeded upon business progression?</td>
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</tbody>
</table>
## L. CONSTRUCTIVE QUESTIONS FOR ADVICE SESSIONS

<table>
<thead>
<tr>
<th>Question</th>
<th>Follow-up Question</th>
</tr>
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<tbody>
<tr>
<td>What do you want to achieve now?</td>
<td>Describe how you would like your situation to be.</td>
</tr>
<tr>
<td>What do you want for the future?</td>
<td>Think of a time when xxx happened. How did you feel?</td>
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<tr>
<td>How will you know when you have got there?</td>
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<tr>
<td>What is happening right now?</td>
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<td>What is going well?</td>
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<tr>
<td>What would you like to go better?</td>
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<tr>
<td>What’s stopping you?</td>
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<tr>
<td>What is your greatest skill?</td>
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<tr>
<td>How do you feel about your job?</td>
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<td>What would make your job more satisfying?</td>
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<tr>
<td>What do you think you are good at?</td>
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<tr>
<td>If you could change one thing in your life what would it be? What impact would this change have on your working life?</td>
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<tr>
<td>What is your greatest strength?</td>
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<tr>
<td>What area would you like to develop?</td>
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<tr>
<td>If you could do anything and not fail, what would it be?</td>
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<tr>
<td>What resources might you need?</td>
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<tr>
<td>On a scale of one to ten how much do you want this?</td>
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<tr>
<td>What is keeping you from getting, or being where you want?</td>
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<tr>
<td>What one thing do you enjoy most about your work?</td>
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<tr>
<td>Describe how you would like your situation to be.</td>
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</tr>
<tr>
<td>Think of a time when xxx happened. How did you feel?</td>
<td></td>
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<tr>
<td>What did you see? What did you hear?</td>
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<tr>
<td>Now enhance these in a situation you are facing.</td>
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</tr>
<tr>
<td>What is stopping you from doing xxx?</td>
<td></td>
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<tr>
<td>If you were to give advice to a friend in your situation what would you say?</td>
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<tr>
<td>What motivates you in the workplace?</td>
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<tr>
<td>What is the worst that could happen?</td>
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<tr>
<td>What could you do to improve your situation?</td>
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<tr>
<td>What would your colleague do if they were in your shoes?</td>
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</tbody>
</table>
M. EVALUATION PROFORMA: EMPLOYERS

This form is designed for completion by employers whose staff have received your IAG services.

Name of adviser: 

Company name: 

Your name: 

Your position in the company: 

1. How would you rate the overall support provided?
   Very good  □  Good  □  Average  □  Poor  □

2. How would you rate the quality of the support provided?
   Very good  □  Good  □  Average  □  Poor  □

3. How flexible were the advisers in meeting your company needs?
   Very flexible  □  Satisfactory  □  Not at all flexible  □

4. What difference have you noticed in your workforce?
   _______________________________________________________
   _______________________________________________________

5. Please suggest any further IAG requirements that our service has highlighted for you.
   _______________________________________________________
   _______________________________________________________
   _______________________________________________________

6. How will you continue to improve your workforce?
   _______________________________________________________
   _______________________________________________________
   _______________________________________________________

7. Would you recommend this service to others?
   _______________________________________________________
N. EVALUATION PROFORMA: CLIENTS

This form is designed for completion by individual clients to whom you deliver IAG services.

Name of adviser:

1. In what ways did the adviser help you?

2. On a scale of 1 to 6 (1 = dissatisfied, 6 = very satisfied) how satisfied were you that your adviser understood your needs and circumstances?
   1 2 3 4 5 6

3. On a scale of 1 to 6 how satisfied were you with the service you received?
   1 2 3 4 5 6

4. What benefits did you get out of the support you received?

5. How would you rate the benefits of the support you received?
   Very flexible ☐ Good ☐ Satisfactory ☐ Not at all flexible ☐

6. What has changed as a result of this help?

7. Would you recommend this service to others?
### O. THE REFLECTIVE ADVISER: A RECORD SHEET

Regular reflection encourages positive growth in the professional individual and supports the development of best practice. Keep a record of the methods and techniques that you use in your work and identify which ones work best for you. Also reflect on the problems and difficulties you encounter and explore how you could have handled these more successfully.

This form may prove useful as a tool for recording your reflections.

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<thead>
<tr>
<th>Company/contact:</th>
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<table>
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<tr>
<th>Purpose of contact:</th>
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<table>
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<tr>
<th>Date:</th>
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<table>
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<tr>
<th>What aspects of today’s meeting were particularly successful and why?</th>
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<table>
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<tr>
<th>What aspects of the meeting were less successful and why?</th>
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<table>
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<tr>
<th>How will today’s experience inform my next intervention?</th>
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<tr>
<th>What was the outcome of this intervention?</th>
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These headings are taken from a draft protocol produced in Yorkshire and the Humber region between skills brokers and the integrated IAG service (skills brokers, nextstep and the Careers Advice Service within Yorkshire and the Humber).

Train to Gain – the service

IAG is:

IAG available to individuals within Train to Gain – the service

However, there may be individuals who wish to access this service outside of Train to Gain delivery – the main sources of IAG in Yorkshire and the Humber are:

IAG available to employers within Train to Gain – the service

Responsibilities
Skills Broker Responsibilities
Referral process for nextstep to Brokers
Referral process for Careers Advice Service to Brokers

Benefits
Data Sharing

Referral Process for the Careers Advice Service to brokers

Annex A – Referral between Brokers and IAG Providers for Train to Gain – the service (diagram)

Annex B – Referral between nextstep or the Careers Advice Service and brokers (diagram)

Annex C – Referral from to IAG provider
## Q. REFERENCES

### Websites

- www.2citysun.ac.uk
- www.clickz.com
- www.businessballs.com
- www.changingminds.org
- www.guidance-research.org/imi-learning
- www.infed.org
- www.lsc.gov.uk
- www.seniormag.com
- www.unionlearn.org.uk

### Books

- Jeffers, Susan – Feel the Fear and Do It Anyway
- O’Connor, Joseph & Seymour, John – Introducing NLP
- O’Connor, Joseph & Seymour, John – A Practical Guide to Achieving the Results You Want
- Ury, William – Getting Past No
- Whitmore, Sir John – Coaching for Performance: Growing People, Performance and Purpose
Delegate Baseline Sheet

Name:

Role:

Based at:

What date is your Engaging with Employers training course? __________________________________________

Where is the course taking place? __________________________________________

So that your trainer can tailor the training day more accurately, please take a few minutes to answer the following questions. You won’t be judged and your answers are confidential, so please answer as honestly as you can!

1. In what capacity will you be working with employed adults?

2. How much work have you done with employers in the past?

3. Do you enjoy working with employers? Please give your reasons.

4. On a scale of 1–10 how confident would you rate yourself at working with employers?
5. What experience have you had of working alongside trade unions?

6. What one thing would you most like to learn from this course?
This document was funded by the Learning and Skills Council (LSC) and developed in partnership with advice-resources and Connexions Lancashire.

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