

Module 3 Assessing Your Clients' Needs

Objectives

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

- ◆ Develop an assessment and selection process for program candidates.
- ◆ Identify selection criteria.
- ◆ Discuss assessment and selection tools you can use.



Activity #1 Self Assessment & Selection Process

Choosing to become self employed is a huge, life changing decision for most people, whether it is something they have always wanted to do or is their most viable option. The self assessment and selection process your organization implements will ideally reflect the importance of this decision by being vigorous, thorough and supportive.

Remember the sample Program Delivery Model we discussed in Module 1? Recruitment and Selection are the first two phases. Here is what it looks like:

Phase 1: Recruitment

Agency promotes program
(allow minimum of 3 month lead time)



Client attends information session



Phase 2: Self Assessment & Selection

Client chooses to participate in self assessment program
(usually a series of workshops & assignments)



Client chooses to submit written application
(application form, simple business outline, sample of work, resume and references)



Agency invites client to an interview
(two-way interview to assess candidates' eligibility, readiness and need for program)



Agency selects client for program
(agency invites eligible clients into program; agency refers non-eligible clients to other community resources)



The purpose of the Self Assessment and Selection process is to:

1. Help clients to assess their own readiness and suitability for the program.
2. Provide your agency with the information you need to select the most suitable candidates into the program.

By focusing first on having clients assess their own readiness, you are helping them to take responsibility for their own learning and success right from the beginning. This also helps clients to feel more in control of their lives at a time when they may be feeling out of control.

Generally, what do you think your Self Assessment and Selection process will look like?

What have you tried in other programs that works?

What have you learned not to do?



Activity #2 Your Selection Criteria

Clients will generally benefit the most from your program if they meet the following criteria:

- ◆ Business idea is reasonable.
- ◆ Start-up financing is in place.
- ◆ Client possesses related skills and experience.
- ◆ Client demonstrates personal readiness and commitment.
- ◆ Client can benefit from the program.
- ◆ Client meets other program specific requirements.

Let's take a look at each one in detail.

Reasonable Business Idea

Clients must know enough about the potential of their business idea to convince you that it is reasonable. It is not up to you to determine whether or not the business could be viable, but up to the client to convince you that it is worth pursuing. Find out what research they have conducted, how much they know about the industry and what research they think they have left to do. If the idea is too big, ask clients how they can break in down into stages, and find out if they are willing to pursue the business on a smaller, more realistic scale.

Reassure clients that you are just trying to find out where they are at with their business idea, not trying to trick them or catch them at something they don't know. There will obviously be gaps in knowledge since clients are coming to you for help. However, there must be a reasonable basis to work with. If clients are at the beginning stages of researching their business idea, it may be too soon for them to apply to the training program.

Start-up Financing

Ask clients how much it will cost them to start their business, and where they will get this money. If their business idea depends upon a certain amount of start-up capital, make sure this is already firmly in place. If not, ask clients what they would do if they were unable to get financing. Make sure they have a back-up plan, and are open to alternatives. *Example:* Start a home-based business instead of renting space. It may be worth asking them about their access to credit and current debt load as well.



Related Skills & Experience

Clients must have the experience, skills and accreditation necessary to deliver the products or services of their business prior to applying to the training program. If they need to develop more expertise or complete a course, suggest that they return once they have everything in place. If they are not sure if they need more skills or certification, suggest they check their competitors' credentials, ask potential customers what experience they would expect of them, or check with an industry association.

Personal Readiness & Commitment

Clients need to be at a place in their lives where they can fully participate in the training program, be open to the learning experience, and commit to starting a business. Make sure that your clients are ready to commit to participating in all of the workshops, one-on-one coaching sessions, self directed research and business start-up activities. Ask them why they believe that this is the right time in their lives to become self employed. Ensure they are ready for the realities of committing to both the program requirements and to starting their own business, and that they have considered the sacrifices and change this will demand in their lives. In addition, they should also consider the status of their physical and emotional health, access to personal support systems, and ability to financially support themselves until the business starts earning money.

Can Benefit From The Program

Find out what clients need and expect from the program, and make sure you can actually help them. Ask them what they can offer the others in the learning group. There is no point in having a potentially successful client in the program if they are not really keen on what you have to offer. It could even have a negative impact on the other participants.

Program Specific Requirements

Depending on how your program is funded, you may have specific eligibility requirements that clients must meet. *Example:* income level, unemployed, receiving social assistance benefits.

When considering the full picture of your clients' suitability for self employment and for your program, the selection criteria may not necessarily carry equal weight. A certain gut feeling you get about a client is definitely part of your selection process.

Example: A client who still has a lot of research to do but is absolutely determined to make it will probably have a greater chance at success than a client with excellent credentials who isn't sure if self employment is the best move.



What are your selection criteria? Write them down in detail.



Activity #3 Client Self Assessment

Your main role at this stage is to offer your clients practical assistance so that they can self select into the application process for the training program. You want to make sure that by the time they submit an application to your agency, your clients have explored the pros and cons of self employment, have considered their current situation, and have come up with a realistic business idea.

Once they have reached the point where they think the self employment program is the right move for them at this particular stage of their lives, then you can begin your selection process.

Depending on your resources, you will likely want to offer a series of workshops, anywhere from a one-day session to several weeks of training, plus some self-directed research for clients to complete prior to applying to the program. Here are some questions and thoughts to guide you:

What kinds of questions about their suitability for self employment do your clients seem to be most concerned about when they first come to your agency for help? How can you address these concerns through the self assessment process?

What do you think the self assessment process should include?

How much time and resources does your organization have for the self assessment process?



Here are some ideas for workshop topics:

Your Business Idea

- ◆ What are you selling? What products and services do you offer?
- ◆ Who are you selling to? What do you know about your potential customers? What do they need or want? How can you meet this need or want? What you need to find out? How you can find out this information?
- ◆ Who else is doing the same or similar work? How can you compete?
- ◆ What much can you charge for your products and/or services? What are your costs in time and money?

Self-directed research activities:

1. Survey 3 potential customers and 3 potential competitors.
2. Develop a sample of the product or service you are selling.

You, The Business Owner

- ◆ What are the pros and cons of being self employed?
- ◆ What does a typical week in business look like? What will you be doing? Does this appeal to you? What will be your role in the business?
- ◆ What are your skills and knowledge? What related experience and credentials do you have? What skills do you have that will help you to operate the business? What skills do you have that will help you to deliver the product or service? What skills and knowledge do you need to develop? What other help do you need?
- ◆ What is your desired lifestyle? What does your “dream” business look like in 3 years? What are your short-term and long-term goals?
- ◆ Are you ready to start your own business? How is your physical and emotional health? What support systems in place? How will this impact your household? What sacrifices are you prepared to make? Can you financially afford this step right now?

Self-directed research activities:

1. Develop a current resume.
2. Obtain 2 – 4 reference letters (1 or 2 work related, 1 or 2 personal).
3. List 10 reasons why you think you should start a business right now.
4. List 10 reasons why you will be successful.



Your Financial Plan

- ◆ What do you need to live on each month? How long you can support yourself without depending on business revenue? What can you invest in your business? What are your start-up costs? How much money do you think you could make in this business? How long will it realistically take to start earning income from this business? What are your current debts? What is your current credit rating?

Self-directed research activities:

1. Develop a personal monthly budget.
2. List your business start-up requirements and costs.

Putting It All Together - Your Business Outline

- ◆ Your Business Idea: What are you selling and to whom are you selling?
- ◆ Your Market: Who is your target market, what do you know about their needs and wants, what is your competitive edge, how much do you think you can charge, and why?
- ◆ Your Financial Plan: What do you need to live on and how will this business support you?
- ◆ Your Success: What are your skills and experience, what is your role in this business, why is this the right time for you to start your own business, and what help do you need?

Self-directed research activity:

1. Develop a preliminary business outline (this can be a simple, two page summary of all of the above questions.)



The goal of these sessions should be to help clients clarify what they know so far, does their business idea basically make sense, and what do they need to do next. The level of depth for each topic area should remain basic and simple.

If clients are interested in applying to the training program, completing and submitting the results of their self-directed research activities could be a required part of their application package.

Regardless of the outcome, the self assessment process can be an incredibly empowering experience for clients as they learn more about their business idea, and their own skills and knowledge. The purpose of this initial step is for clients to make the sole decision about whether or not to pursue the program. If they choose not to proceed with the next step, commend them on making a good decision for themselves and offer them a referral to other community services whenever possible. If you have the resources, help them to complete an action plan.

*** Check out “Exploring Self Employment: A Self Assessment Tool for Women Entrepreneurs” in your toolbox!**

What will your client self assessment program include? Write it down in detail.





Activity #4 Selection

Once your clients have determined that becoming self employed and getting your help is the right step for them, you now need to select the clients you will invite into your program.

What do you want to find out about a potential candidate in order to be able to decide if they should be in your training program?

What specific assessment tools do you use in other programs that are effective?

What do you think the selection process should include?



Here are some ideas:

1 Application Package

At the end of the client self assessment program, give clients a few days to submit the following application package:

- ◆ Application form
- ◆ Simple business outline
- ◆ Results of self-directed research activities
- ◆ Sample of work
- ◆ Resume
- ◆ References

Be clear that only completed applications will be accepted. Depending on your resources and the number of applicants, you may wish to tell people that only a certain number of people will be invited for an interview.

2 Individual Interviews

Based on the application packages, invite prospective candidates for an interview. If possible, interview in pairs.

A 45 minute interview could be organized as follows:

- ◆ 10 presentation from client
- ◆ 30 minutes for interview questions
- ◆ 5 minutes for questions



Check out the sample interview questions in your toolbox!

Go back and review the selection criteria. It is helpful to allow time after each interview for the interviewers to exchange views and come up with a preliminary assessment of the candidate's eligibility. If you have time, do a review at the end of each interview day.



Once you have made your final selection, how will you inform clients? Remember that some clients that you want to invite into your program may change their minds and turn you down. It may be wise to get confirmations from everyone before calling the people you have declined.

How will you inform the clients that you have declined? What can you do to assist them?

You have now completed the Self Assessment and Selection phase of your program. In the next module, we will look at how to design and deliver your self employment training program.



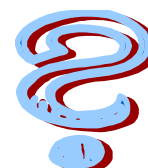
Food For Thought



Lessons Learned

- #1 Trust your instincts. If you have a gut feeling about a client but can't quite put your finger on a reason why, talk about it with a colleague. Chances are, you are right.
- #2 Avoid passing judgment about a person's business idea. You do not have to assess whether or not the business idea is good or viable, only whether or not the client has provided enough evidence to indicate that it is worth pursuing and that his or her assumptions make sense.
- #3 When helping a client to decide if they should pursue their own business, ask them questions that will lead them to their own conclusion as opposed to offering your opinion. This truly needs to be the client's decision.

Discussion Questions



Individually and/or with your team members, discuss the following:

- #1 You have interviewed 25 candidates, and can only select 15. You have 14 places filled, and are vacillating between two people for the final spot:

Wilma is likely to be successful as she has already started making a couple of sales and is highly motivated. She is really keen on the program, open to helping the other participants in the group, needs a bit of assistance with her bookkeeping, and says that her primary reason for applying to the program is for support and encouragement as she doesn't get a lot of support at home. You sense that she will make it with or without your help.



Stella really needs your help. In the past year, she has participated in a life skills program and a job finding club, and still has been unable to find work. She feels that self employment is her only viable option at this point, and she has an idea for a small, home-based business that she would like to try. Based on what she says, you sense that the business may or may not work out, but would definitely have a better chance if she were in your program.

What do you do?

#2 You have 2 applications from individuals wanting to start a desk top publishing business. Both applications are equally strong and you can't find any reason to accept or decline one person over the other. You are concerned about having 2 competitors in the same group, especially since they will be selling to the same market.

What do you do?

In Your Toolbox



✂ Exploring Self Employment: A Self Assessment Tool for Women Entrepreneurs

✂ Sample Interview Questions

