



CAREER COACH  
INSTITUTE

## MAKING THE TRANSITION FROM CASE MANAGER TO COACH

By Marcia Bench, MCCC

Increasingly, workforce development organizations around the U.S. are changing the title of their frontline staff. Instead of calling them “case managers,” they are designating them “coaches.” But what are the philosophical and practical differences between the two approaches? Is it just a change in title, or does it mean more than that? This article will review the differences and similarities and suggest key steps your organization can take to initiate the transition if desired.

### ***The Case Management Approach***

Case management draws its roots from health care and social services. Following are some characteristics of case management.

1. *Caseload.* Though not deliberately intended, case management can tend to emphasize numbers of customers and “caseload,” rather than individual people with unique needs. The pressure to keep the load of active cases low can compromise quality of service and make customers feel like a number rather than a name.
2. *Management.* Case “management” implies that the professional’s role is to move customers through a series of stages. The “difficult” customers – who do not move through the system as quickly as others – become simply an impediment to the case manager’s success, rather than an opportunity for innovation toward a successful outcome.
3. *“Standardization.”* Case management usually uses a standardized process with all customers, and expects them to eventually move through it – some quickly, some more slowly. The problem with this expectation is that customers come to an America’s Job Center with widely varying needs. Some may have disabilities, some may be executives in career transition – and everything in between. If a standardized process is used for all, some customers will find aspects of it irrelevant or redundant, while others will need more time on one area than another.

4. *Diagnosis and treatment.* While workforce staff are not caregivers in the traditional sense, case management is structured around diagnosis and treatment. Through an extensive intake application, the customer's work history, skills, disabilities and similar information is inventoried. The case manager then "diagnoses" the customer's needs and applies an appropriate treatment usually the standardized process referred to above. The emphasis is on the past and on skills.

## ***The Coaching Approach***

Coaching has been used in athletics for decades, but only applied in career and workforce development for approximately the past 15 years. Coaching is "an interactive process of exploring work-related issues – leading to effective action – in which the coach acts as both a *catalyst* and *facilitator* of individual and, in turn, organizational development and transformation." (*Career Coaching: An Insider's Guide*, Marcia Bench).

Following are some characteristics of coaching as applied to workforce development:

1. *Individual Clients.* Just as the title of the staff person shifts from case manager to coach, the designation of the people they assist evolves from customer to client. The focus of coaching is on clients, their unique needs, and how to be of maximum service to them. This does not mean that fewer clients are served, however! It simply means that the coach (or staff person) is more attuned to each person's individual needs and how best to facilitate their forward progress.

2. *Action.* Coaching leads to action – period. Without action, it is ineffective. Rather than being an expert or advice-giver, the coach is a "catalyst and facilitator." This means the coach draws the client out, asks probing, open-ended questions, and provides feedback based on observations of behavior and language. Clients in turn discover things about themselves that they did not already know, realizes that the real barriers to their success are not what they thought, and finds the internal motivation to take action – fueled by the excitement of the discover process.

3. *Customization.* While coaches may use a brief intake form and standardized assessments if appropriate, they remain committed to customizing their approach by "meeting the client where he/she is." This does not need to take longer! Indeed, it could mean that with some clients the process is abbreviated so that the coach can spend additional time with clients needing extra attention. For example, if a dislocated worker client does not wish to have his/her skills assessed because she feels comfortable that she knows what they are, but prefers to focus on clarifying a career direction that emphasizes her values and life/work balance, that is perfectly fine in the coaching model!

4. *Results.* In an environment of increasing accountability requirements for workforce organizations, results are what counts! Coaching emphasizes results – and the burden is squarely on the client to achieve them. In the case management model, the

customer tends to rely unduly on the case manager to do the work and tell them what to do. With coaching, the client is charged with taking action toward their desired results, and if they do not, it is clearly not the fault of the coach.

Learning coaching as an alternative to case management can revitalize staff as they learn new skills, and can also improve bottom-line results achieved by the America's Job Center or workforce center.

## ***Making the Transition***

Our organization, Career Coach Institute, has served multiple career centers in the workforce system to assist them in making the critical transition from case management to coaching. While already successful in the workforce industry, these centers are seeking further improvements in both results and quality of the service they provide.

If your America's Job Center wishes to consider transitioning from the case management to the coaching approach, following are some steps to follow:

- 1. Determine whether coaching is consistent with your customer/clients' needs and with the mission of your center.* Perhaps your center is in a very conservative area, or serves a group of customers for whom you are not sure coaching is appropriate. Or on the other hand, perhaps your America's Job Center is seeking a way to provide more meaningful services such that coaching would fit perfectly. It is important to evaluate whether this approach fits with your organizational values and customer needs. Coaching can be a cost-effective solution to the frequent situation where a small staff serves a wide geographic region consisting of multiple counties, since coaching is usually (but not always) done by telephone.
- 2. Do not just change frontline staff's titles to "coach;" instead, arrange for your staff to be trained in coaching skills, with appropriate certification.* Six out of 10 Fortune 500 companies offer coaching to their staff, but for the term to have meaning, it must denote the addition of new skills, not just a new title. Organizations such as Career Coach Institute are dedicated to providing training which specifically teaches coaching skills in the workforce context – and no on-site training or travel is required! Whether you choose CCI or another vendor, we recommend that you offer training in the skills your staff will need to assume the new role of coach. They will have old habits to un-learn in the process!
- 3. Communicate the purpose of the change, as well as the process, throughout your organization.* This should be done through a variety of media, including email, announcement and discussion at an organization-wide meeting, bulletin board announcements, and discussions with staff by managers at each site. Provide open forums for discussion in which staff can ask honest questions about the need for change, what's in it for them, and how the training will proceed.

4. *Commit Center resources to this initiative.* Saying you are going to become a coaching-oriented center, and doing it, are two different things. If this transition is to be meaningful, you must commit staff time and funds to the effort. Frequently, a Request for Proposals is issued to interested firms to invite them to bid on a career coach training and certification initiative, which may involve consulting with your center to determine needs and best approach.

5. *Obtain “buy-in” from each person to be trained.* Finally, to ensure that this training and transition is not just “another program,” each individual to be trained needs to make a personal commitment to be involved and see it through to the end. Our client mentioned above actually obtained a written letter of commitment from each staff member, by which they made certain promises relating to their training. And involvement in the training is voluntary – staff must “compete” in a sense for the limited number of spots budgeted. Needless to say, those who are being trained are highly committed!

By following these steps, your Center has a high likelihood of a successful transition from case management to coaching.

---

---

*About the Author:* Marcia Bench is the Founder and Director of Career Coach Institute, <http://www.careercoachinstitute.com>, which trains workforce development staff nationwide in the cutting edge skills of career coaching. Marcia is the author of 25 books on career coaching, transition management, and job search including the “bible” of career coaching, *Career Coaching: An Insider’s Guide*. She is a frequent speaker at professional conferences and in the media. Feel free to contact us directly with any questions on the content of this article at [info@careercoachinstitute.com](mailto:info@careercoachinstitute.com) or 503-308-8179.