

CRITERIA: Area of Evaluation

A: Introduction

Interview: asked important and relevant questions; reasonable time spent

Cover page: Confirmed ID; discussion of "self-discovery"

Table of Contents : When to use this report (to encourage future use)

4 Windows page: Explain

Explanation of Scales and Scores, including mid-range, introductory discussion of personality

B: Personality

Personality: Main factor, description, sought client confirmation

Personality: Sub-factors used to explain nuances of main factor; sought client confirmation

Personality: Career Implications (Client ID of the most important ones; any not apply)

Personality: Paragraphs (read paragraphs or had a discussion during the graph review to cover the same ideas); sought client confirmation
Strengths/Non-strengths: clear explanation, markings, summary, "homework"
Money Page Discussion
Critical Life Issues: appropriate discussion
C: Interests
Circle graph: good explanations of how the client's interests are distributed; good questions
Explanation of Vocation/Support/Lifestyle interest levels, with examples
Working through Interests appropriately
Appropriate review of Interest Summary Pages (Activity/Occupation/Subject)
Appropriate review of Lowest Interest Groups; red flags noted if applicable
D: Skills
Skills: appropriate review including any red flags within the Lowest Skills section
E: Values
Work Environment, Work Outcomes and Life Values Asked for further explanation of how client values them when needed/helpful
WE, WO and LV: Any others needed to be added (top 5?) Any thing low in Values that should be noted/pointed out/asked about?
F: Interactive Action Plan
Synthesis Process: Creating the Donut
Synthesis Process: Create a Funnel with client

Next Steps: O*Net navigations

G: ICF Core Competency Standards

Cultivates trust & safety for the client

Maintains presence

Listens actively to client

Evokes awareness - ask questions

Facilitates client's growth

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Comments

In terms of preparation, I had already prepared the materials and studied her report. I also reviewed the manual again to refresh my understanding. However, what I overlooked was the technical aspect—specifically, choosing a suitable online meeting platform for the consultation.

We initially tried using Google Meet and even recorded our session, but we soon realized it was difficult to screen share. Since neither of us was very familiar with Google Meet, we decided to switch to Zoom. Unfortunately, because both our Zoom accounts were free, our meetings were limited to 40 minutes. As a result, we had to divide the session into several parts and stretch it over multiple meetings.

This experience made me realize that when conducting online consultations, it's essential to anticipate possible technical issues and ensure that the chosen meeting platform works smoothly beforehand. Overall, however, I felt that Ms. Mandy was comfortable and relaxed as she went through her report with me.

I was able to do this.

I was able to do this.

I was able to do this.

I have to deliver the explanation as natural and seamless as possible, for some parts of it, I was looking at my notes.

For the personality part, I feel that I did what was necessary—asking Ms. Mandy questions, keeping her involved, and making sure she was engaged throughout the session. She actively participated, even reading some parts of the report herself and sharing personal insights. For instance, she mentioned that while she tends to be unstructured, she actually prefers working with an organization or a boss who is structured. This was consistent with her responses in the questionnaire. I explained that because of her naturally unstructured nature, she values having someone who can handle the details and bring structure to her work; otherwise, things could easily become chaotic. This dynamic suits her as she tends to think in big-picture terms.

We also clarified her high "Debt" score during the discussion, and she was given several opportunities to reflect and confirm whether certain personality descriptions felt true to her.

If there is one area I need to improve on, it would be becoming more comfortable and natural when explaining the

different personality factors and subfactors, as well as making smoother transitions from one factor to the next.

For the Interests section, we were able to go through each one and cover everything thoroughly. I also explored with Ms. Mandy where each interest might be coming from and how it fits with her overall design. One interest that stood out was in mental health and counseling, though she also expressed an interest in education, but not in a traditional classroom setting. As she mentioned in her questionnaire, classroom teaching does not match her energy.

She also showed interest in food and agriculture, partly because she and her husband are into wine. In addition, she expressed interests in self-employment and hospitality. In her questionnaire, she mentioned wanting to own a farm and do something related to wellness and food, as she enjoys cooking and wants to create a space that brings people together. This is also where her interest in cross-cultural experiences connects, since her husband is German.

Overall, the questionnaire provided useful background information that helped me see how each interest contributes to the bigger picture of who she is and what she values. Toward the end, she even shared a rough dream or vision for her future, to own a wellness farm, which beautifully tied together many of her interests.

Just like with the personality section, I realized that I need to become more comfortable and natural when explaining the different interests and making smoother transitions from one factor to

For the Skills and Values section, I was able to cover it with Ms. Mandy within the time specifically allocated for these parts. Based on my observation from the study consultation videos, roughly 20% of the session time is devoted to these sections, and they do not need to be as thorough as the Personality section. I asked questions to clarify whether the identified skills and values truly reflected who she is. However, similar to the other sections, I recognize that I need to work on becoming more familiar with the descriptions of each category and ensuring a smoother transition from one section to the next.

For the Synthesis process, this was also covered in its entirety. As suggested by Jan, I did the Interactive Action Plan (IAP) for both strengths and non-strengths right after the Personality section. This approach made sense, as the information was still fresh in both our minds and naturally connected to the topic before moving on to Interests, Skills, and Values.

After discussing the Interests section in the detailed report, I revisited the IAP doughnut to stay aligned with the topic while the information was still fresh, before proceeding to the Skills and Values sections. Once all four dimensions—Personality, Interests, Skills, and Values—were discussed, we returned to the IAP to review the Interest doughnut and determine whether each interest remained vocational, supporting, or lifestyle.

We then proceeded to explore one career option, examining how it aligns across the four dimensions and its overall percentage fit with her design. However, since she is currently pregnant, her career options are somewhat limited, as she shared that she needs to focus on her pregnancy and caring for her baby. Despite this, she expressed that she “cannot not do anything” and would still like to keep herself busy—possibly by writing another book and doing freelance counseling.

Overall, I felt that it was a warm and personal consultation, while still staying focused on what needed to be discussed, despite a few technology issues. ☺ It certainly helped that we are peers and work in the same school. As a new mom, I was also able to connect with her on the topic of motherhood, which we are both very excited and passionate about.

The rapport, warmth, and sense of trust and safety were clearly present throughout the session. I also felt that active listening and genuine presence were consistently demonstrated. Asking awareness-evoking questions came quite naturally, likely because of the personal connection we share.