

Career Planning & Adult Development

JOURNAL

Volume 31, Number 3

ISSN 0736-1920

Fall 2015

CAREER DEVELOPMENT in CORPORATIONS

Rich Feller and Ruth Pankratz

Guest Editors

- **Career Development at GM: Accelerating Careers through Core Values/Conversations**
 - **Learning As A Resource To Career Development**
 - **A Skill-Gap Development Model Within The Healthcare Arena: A Comprehensive Approach To Professional Development**
 - **A Corporate Case Study: Adapting a Narrative Career Management Framework for an Organizational Leadership Engagement Program**
 - **A “Wow!” Approach to Self-Directed Employee Career Development**
 - **Internal Succession Planning: The Research and Practice of Growing and Developing Retail Pharmacy Talent from Inside the Corporation**
 - **Change Your Focus, Change Your Team: An Integrated, Strengths-Based Approach to Corporate Career Development**
 - **A Look at the New Public Workforce System Under WIOA**
 - **Corporate Career Development: Fundamentals**
 - **Transformation: How An Engagement Process Renewed One Company’s Culture**
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CAREER PLANNING and ADULT DEVELOPMENT JOURNAL

The Career Planning and Adult

Development Journal (ISSN 0736-1920) is an official publication of the Career Planning and Adult Development Network, a non-profit organization of human resource professionals, career counselors, educators and researchers. Network offices are located at 4965 Sierra Road, San Jose, CA 95132 USA

Telephone (408) 272-3085

Frequency of Publication: The Journal is published up to four times each year.

Change of Address: Send both the old and new addresses at least four weeks before the change is to take effect. Please enclose your network label, when possible.

Back Issues: Back issues of the Journal, when available, are \$7.50 each, plus \$1.50 shipping.

Permission: Excerpts of less than 200 words may be reprinted without prior permission of the publisher, if the *Journal* and the Network are properly credited. Written permission from the publisher must be requested when reproducing more than 200 words of *Journal* material.

Journal Distribution:

The *Journal* is sent free to each active member of the Career Planning & Adult Development Network—up to four issues each year.

Publisher:

Richard L. Knowdell

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Career Development in Corporations

Looking Ahead with the Journal, by **Steven E. Beasley**, Managing Editor4
Introduction to this Issue, by **Rich Feller, PhD**, Guest Editor5

Chapter 1: Career Development at GM: Accelerating Careers through Core Values and Conversations, by **Mimi Brent** and **Adela Perez**.....9

Chapter 2: Learning As A Resource To Career Development, by **Steve Graham**.....16

Chapter 3: A Skill-Gap Development Model Within The Healthcare Arena: A Comprehensive Approach To Professional Development, by **Gerard Camacho**.....20

Chapter 4: A Corporate Case Study: Adapting a Narrative Career Management Framework for an Organizational ‘Leadership Engagement’ Program, by **Heather E. Bennett** and **Mark Franklin**.....31

Chapter 5: A “Wow!” Approach to Self-Directed Employee Career Development, by **Katy Piotrowski**41

Chapter 6: Internal Succession Planning: The Research and Practice of Growing and Developing Retail Pharmacy Talent from Inside the Corporation, by **Denise Caleb**.....46

Chapter 7: Change Your Focus, Change Your Team: An Integrated, Strengths-Based Approach to Corporate Career Development, by **Marie Zimenoff**.....52

Chapter 8: The North East Regional Employment And Training Association Takes a Look at the New Public Workforce System Under WIOA, by **Colleen LaRose**.....59

Chapter 9: Corporate Career Development: Fundamentals, by **Paulette Fried**.....65

Chapter 10: Transformation: How An Engagement Process Renewed One Company’s Culture, by **Andrew Stirrat**.....71

Other Information

Guidelines for Authors.....76
Obtaining Back Issues of the Journal.....78
Joining the Career Planning Network.....80

A CORPORATE CASE STUDY: Adapting a Narrative Career Management Framework for an Organizational "Leadership Engagement" Program

by **Heather E. Bennett and Mark Franklin**

This article presents a case study describing how the CareerCycles career management framework (Zikic, Franklin, 2010; Franklin, Yanar, Feller, in press) was adapted and used to plan and execute a leadership engagement program for the leadership team of a small and medium enterprise (SME) manufacturing firm in North America with its head office offshore. We present the client's desired outcomes; describe the CareerCycles holistic, narrative framework, and evidence-based method of practice, tools and experiential game from One Life Tools that were adapted to address the client needs; the lessons learned that affected how later parts of the program were modified; and the outcomes observed and measured during the six-month leadership engagement program.

Overview of the CareerCycles Framework

The CareerCycles framework takes a narrative approach, with its conceptual model, suite of tools and holistic definition of *career* comprehensively connecting the many human and systemic variables shaping an individual client's experience. (Franklin, Feller, Yanar, 2014)

Within the CareerCycles framework, career is defined as: *The full expression of who you are and how you want to be in the world, which keeps on expanding as it naturally goes through cycles of stability and change.* This definition moves individuals away from career as a job and introduces a more holistic view. (Franklin, 2014, p. 451)

The CareerCycles framework consists of two processes, Career & Life Clarification and Intentional Exploration, a method of practice guided by 40+ interventions and related training, (www.careercycles.com) and a suite of related online and gamification tools from One Life Tools (www.onelifetools.com). In particular, the narrative Career & Life Clarification process involves debriefing an individual's stories and experiences to construct a comprehensive Worklife Sketch. The framework which helps individual become empowered and proactive in their career and life choices, is shown as Figure 1 in the previous issue of this Journal (Franklin, Feller, Yanar, 2014).

Using the Framework in Client Organizations

Working with individual clients, CareerCycles Associates hear stories of disappointment, frustration, and longing to do work that is appropriate to their education, skills, experience and desired future. Using the CareerCycles method of practice, Associates, and other professionals who are trained in the method, engage individual clients to better manage their worklives.

Associates also know the other side of the story — managers needing to get the work done, optimize productivity, improve quality, and achieve specific targets. Managers may feel thwarted or at a loss to effect needed motivation or outcomes, and at the same time feel disappointment, frustration and longing to achieve their own worklife success.

The Issue/Opportunity

The senior management team of a SME manufacturing firm, operating a plant on a 24/7 basis, hired CareerCycles to support its leadership team as an intentional organizational culture change took hold under the leadership of a new CEO based overseas. This involved making a shift away from a strict hierarchical command-and-control to one of *collaboration* and *alignment*, as it gained independence and authority to make decisions locally. Senior management recognized a need for outside, objective support to assist the local leadership team to effect and sustain the culture change by developing trust and fostering alignment with the firm's business goals.

To make the culture change collectively, senior management recognized the imperative of individuals making an overt commitment to the organization's business goals. An important dimension of the leadership engagement program was providing several opportunities for leaders to enhance their self-awareness of what was important to them. The goal was to facilitate individuals' awareness of how worklives could be brought into alignment with the organization's culture and business goals leading to individual and collective behavior change.

Assumptions

The client approached CareerCycles to plan and execute the leadership engagement program. Mark Franklin's industrial engineering background, combined with the expertise in career management, training, and individual career coaching of the Associates involved in the program, assured the client that the team understood the business imperatives and that the 1:1 coaching and group sessions would be targeted at the desired skills development and improved productivity. The project team accepted senior management's stated commitment to providing the resources and encouragement during the six-month leadership engagement program. Further, we expected they would participate fully in the various dimensions of the program, modeling behavior change, thereby collectively and incrementally, contributing to making the desired culture change.

A careful front-end needs assessment with senior management indicated a number of elements would need to be addressed in the leadership engagement program, including: Recognition of cultural differences between the informal and adaptable management style of the North American operation and a more formal and structured approach taken by the overseas head office. A diverse leadership team made up of managers ranging in age from 25 to 64 years; the majority in mid-career and mid-life; mostly male; and all having completed at least some college programs, with at least two with post graduate training. The reality of dealing with issues and building a collaborative culture given a 24/7 operation; not all managers would be able to attend the experiential learning sessions together as a single group. Recognition that the program and its intent to deal with organization culture change would be welcomed by some and resisted by others; we needed to be attentive to those who were sceptical or too optimistic!

This was a high stakes program; retaining and engaging leaders to make the culture change was vital not only for the success of the plant to achieve its business targets, but for the breadwinners reliant on these jobs; few manufacturing jobs remain where the plant is located. A need to show steady progress over six months to effect lasting, individual behavior change, achieve specific business outcomes and the organizational culture change.

The Team

Led by Mark Franklin, the project team included Angie Bjornson and Kris Dawson, both of whom have strong corporate HR backgrounds and experience leading corporate organization-wide change initiatives; Iris Jacobson, who has experiential learning design and facilitation experience; and Heather Bennett, whose role involved the design and implementation of pre- and post- surveys, and subsequent analyses. All team members have many years of career coaching experience and are trained to use the CareerCycles framework.

The depth of the team's expertise and experience using the Career & Life Clarification and Intentional Exploration processes, proved to be valuable in building trust in the early weeks and months of the leadership engagement program. Later, Associates drew on their experience and expertise to support the leadership team as they confronted the realities arising from self-awareness and making behavior change potential to make the transition to a culture of collaboration and empowerment to achieve business goals.

The Approach

The team adapted CareerCycles Career and Life Clarification and Intentional Exploration processes, and One Life Tools game for organizational application. The program included:

Individual coaching. Up to six one-hour sessions were offered for each of the members of the leadership team, with at least one session taking place before the first group training session. The objective of the coaching was to support leaders as they prepared and considered their unique WorkLife Statement and alignment with the organization's goals.

Three group training sessions.

(1) Who You Are Matters! A One Life Tools proprietary, half-day, team-building game experience aligned with the CareerCycles method of practice. The game is collaborative, not competitive, and uses a narrative approach to help leaders gain clarity about their strengths, preferences, assets, goals and career paths within the organization. Working together in cross-functional groups of five to play the game, peers were empowered to think, feel and say who they are and what is important to them in their careers and lives. During the game, each participant captured and recorded data on a WorkLife Sketch and later used this to prepare a WorkLife Statement.

(2) Giving and Receiving Workshop and Feedforward Technique half-day workshop. The skill-building workshop was held about a month after Who You Are *Matters!* and was designed to train the leadership team to offer feedback to their employees, and receive feedback on their own performance, on a day-to-day basis. The training to use the Feedforward Technique (www.Feedforward.co.il) was focused on using this evidence-based and narrative method (Budworth, Latham, Manroop, 2015) for performance management. Leaders were trained to ask employees

to describe and analyze a significant positive workplace experience to identify the conditions that enable them to perform at their best. Doing so helped leaders build a shared vision, support their direct reports to feel positive and motivated, and create alignment between employees' goals and the organization's strategic goals.

(3) Prelude. The Prelude Trust-Building Accelerator workshop was a blended-learning experience (www.playprelude.com). The underlying holistic philosophy and psychology is built on a four-color personality typology similar to Temperament (Keirse, 1998) and True Colors®. The leadership team had taken a True Colors workshop within the previous two years and Prelude provided an opportunity to experience how their personality traits play out everyday in the plant and to build trust and collaboration. This workshop was held one month after the Feedback/Feed-forward Technique workshop.

Surveys. Pre-and post-surveys were developed with senior management to measure the extent to which the desired program outcomes were achieved. One survey was developed and administered using SurveyMonkey to: (i) gather demographic data from the leadership team (ii) share what participants hoped to gain from the leadership engagement program (iii) indicate the extent to which they were comfortable: giving and receiving feedback about job performance and discussing how to contribute to the success of the organization (iv) indicate the extent to which they trust their employees and are trusted to get the work done; (v) indicate the extent to which their knowledge, skills and abilities match the requirements for success in their current role; their current role is a good match, enables them to do the kind of work they want to do and meets their needs.

A link embedded in the SurveyMonkey survey took the leadership team to complete the Psychological Capital (Luthans, Youssef, Avolio, 2006) survey available commercially from MindGarden (www.mindgarden.com). Psychological capital is defined as *an individual's positive psychological state of development* and is characterized by:

- having confidence (self efficacy) to take on and put in the necessary effort to succeed at challenging tasks;
- making a positive attribution (optimism) about succeeding now and in the future;
- persevering toward goals and, when necessary, redirecting paths to goals (hope) in order to succeed; and
- when beset by problems and adversity, sustaining and bouncing back and even beyond (resilience) to attain success." (Luthans, Youssef, Avolio, 2006)

Significant change can affect **Hope**, **Efficacy**, **Resilience** and **Optimism**, abbreviated HERO, and the *PsyCap survey* includes four subscales to determine the extent to which these dimensions were affected by the leadership engagement program.

Communication strategy. The team provided input for senior management to prepare and send ongoing communications about the leadership engagement program, including who was participating; what would be involved and the timeline for the program; why it was seen as critical to successfully making the desired organizational culture change; and what participants reported in the evaluations following each of the group sessions, enabling the leadership team to gauge progress toward the desired outcomes.

Lessons Learned

Initial 1:1 Sessions

The initial 1:1 sessions enabled Associates to build a working alliance with their individual coachees. Associates provided a sounding board for leaders who raised objections about the program and why it was being offered. Some coachees expressed their belief that the program was a means for senior management determining whom to terminate. Such overt comments were valuable to hear. Doing so offered opportunities to build trust by accepting their point of view; heightening awareness of resistance; and asking for permission to provide appropriate, anonymous feedback to senior management. The early 1:1 coaching sessions allowed coachees to gain self-awareness by telling their career stories during their tenure in the organization. These sessions set-up individuals to actively engage in the group activities.

Subsequent 1:1 Sessions

Associates deepened their conversations with their coachees as time went on, and each element of the leadership engagement program took place. They invited leaders to reflect on what they were learning about themselves, and the dynamics of their interactions with their peers. They talked at increasingly deeper levels about how their beliefs, values and behavior affected decisions they had made in the past, and were considering for the future, and about how they could be more collaborative in the organization.

As Associates worked with leaders, they used and adapted the CareerCycles WorkLife Sketch and the WorkLife Statements. These tools helped leaders articulate and clarify their individual visions for their worklives. Individuals were encouraged to consider how to address the possibilities they saw for themselves. Some recognized they had only a few years remaining until retirement and grappled with leaving a career legacy. Some saw potential for making a commitment to the organization for the long-term and envisioned specifically what they wanted to do and how to get there. Others faced the reality of limited opportunities in their current role or business unit and considered what that meant for their future. Associates encouraged their coachees to consider what they could control and what they could not. These coaching conversations, in which individuals were given permission to imagine ways of enacting their WorkLife Statements, were rich and energizing. Following the Feedback/Feedforward workshop, Associates focused on guiding coachees to use their WorkLife Statements to execute their Exploration Plans. These plans emphasized noticing clues and taking inspired actions, which helped accelerate and then stabilize new behaviors and momentum in interacting with their direct reports, peers, and managers to whom they reported.

Exploration Plans

As members of the leadership team identified and explored possibilities they identified, and were energized by, the possibilities they saw for the organization. These were sometimes unexpected illustrations of deep engagement. In these coaching conversations, Associates captured *larger ideas* i.e. those possibilities beyond the leaders' individual job mandates, and outside their direct control. These larger ideas were collected and later shared with senior management, anonymously, for consideration. For example, one participant suggested using social media to make known a dramatic, positive environmental practice the plant had implemented, which had never been made known to the public, and had significant potential public relations benefits.

Group Learning Tools

The group experiential learning tools were effective in building trust, mutual understanding, and new insights about the capabilities, commitment, and potential among fellow team members.

Two key messages built the case for participating in the sessions:

1. Lack of alignment can lead to blame, which erodes trust in one another;
2. Connecting with one another builds trust, fosters alignment, and increases productivity and other key business measures.

As a collaborative team-building game, playing **Who You Are Matters!** facilitated conversations among team members who otherwise do not work together on a day-to-day basis. The stories shared offered powerful new ways of seeing their peers in other situations and opened possibilities for considering how to learn from these experiences as they faced moving to a more collaborative organizational culture.

To deepen and broaden the learning from the experience, participants were reassigned to different groups for a post-game facilitated conversation. In these groups they acknowledged what they have in common and where they are aligned, which helped to integrate their individual and organizational goals.

The evaluations of **Who You Are Matters!** indicated the experience had been very powerful with 17 of the 20 participants rating it a 4 or 5 on a 5 point scale. Comments included “*I have better understanding and trust about my colleagues*”; “*we share common goals*”; “*there seems to be a desire to talk through and solve problems*”; “*we’re in this together*” all of which spoke directly to achieving the goals for the session. A significant outcome from **Who You Are Matters!** was a word that became part of the lexicon for the remainder of the leadership engagement program—accelerate. This became shorthand for the group and meant: readiness to move forward. Recognizing there were still issues, team members were better able to talk about and address common problems and accelerate, given higher levels of trust and better alignment with the organizations’ goals.

Feedback/Feedforward Workshop

Participants the Feedback/Feedforward workshop rated highly with 89 per cent rating it a 4 or 5 on a 5-point scale. A lengthy list of learning outcomes and insights was identified from the workshops including, “*the importance of providing corrective feedback*”; “*I will think about the timing and frequency of feedback*”; a need for “*more practice to offer corrective feedback.*” All indicated they were willing to try the Feedforward Technique with their employees. The workshop facilitators noted that leaders were less tentative as they participated in pairs and in small groups during the workshops, providing tacit evidence of growing trust in, and openness to, learning from one another.

Prelude Workshop

The Prelude workshop was the first time the entire leadership team came together for the half-day session. The decision to do so sent a significant signal about the importance of their increased trust, collaboration and appreciation of one another’s strengths and contributions to the business outcomes.

The experiential workshop took participants through a specific progression to enhance their awareness from *inner* exploration to *outer creativity* and from the individual to the group. An outcome of the workshop was a large mural created collaboratively incorporating individual team members' drawings, and the creative outputs of small groups. The mural visually represented how leadership team members work separately and collectively and took the group to a new level of camaraderie. The workshop evaluations suggested participants enjoyed being together as a group and had gained valuable insights about how their personality characteristics are manifested when working together to solve problems and make decisions.

Evaluations

Ongoing evaluations provided valuable input and feedback to the leadership team. Nineteen of the 24 members of the leadership team completed the pre-survey administered via SurveyMonkey. Participants expressed candidly their hopes and concerns for the program, which centered around improving the work environment; teamwork; trust; communication; effectiveness as leaders; skills for motivating, supervising, supporting others, setting goals, time management; presenting and implementing good ideas; confidence; respect. Senior management and the Associates learned there were serious concerns about the leadership engagement program and it was helpful to be aware of this going into the program. Phrases such as: *We're not working together as a team; There's an elephant in the room...; I'm suspicious about...; Will people take what they learn and leave?; Will positive change happen?* prepared the Associates for pushback.

While just less than half of the participants completed the post-survey, the results indicated that the leadership engagement program had impact. As a result of the training, participants reported improvements related to: self-knowledge, self-confidence, coaching direct reports, clarity about my own career, where to focus energy and effort, understanding the needs and motivations of others, giving and receiving feedback, and using the Feedforward Technique.

Specific pre-and post- leadership engagement program behavior changes were as follows:

ITEM	PRE	POST
I am comfortable giving feedback to employees about their job performance	47%	78%
I am comfortable receiving feedback about my job performance	89%	89%
I am comfortable discussing how my employees want to contribute to the success of the organization	74%	100%
I am comfortable discussing how I want to contribute to the success of the organization	79%	100%
I trust my employees to use their individual and collective capabilities to get the work done	79%	78%
I am trusted to use my skills and personal qualities to help my team get the work done	74%	89%
My knowledge, skills, and abilities match the requirements for success in my current job.	79%	100%
My current job is a good match for my knowledge, skills and abilities	74%	89%
My current job meets my needs	79%	89%
My current job enables me to do the kind of work I want to do	63%	89%

Significant unforeseen business decisions were made during the program that had an impact on the leadership team. A significant learning for the Associates was that external factors influenced the program outcomes. A question that could have been included on the post-program survey was “*How much do you attribute your responses to influences outside of the program?*” (Hiebert, Magnusson, 2014) Such a question would allow participants to reflect on personal experiences and insights as well as organizational decisions influencing their behavior changes, alignment and outcomes, apart from the program.

Senior Management Clarity & Commitment

The program, while clearly focused at the outset on alignment and culture change support, could have been better defined, reinforced and communicated to the leadership team. Notwithstanding that senior management had espoused their commitment to the program over the six-month duration, the Associates were disappointed that participation was not as full and enthusiastic as anticipated. For example, not all leaders participated in the group workshops, with no sanctions imposed. Several were permitted to withdraw before completing all individual coaching sessions. Difficult conversations with senior management about potential negative consequences did not result in changing the decision.

The decision had the effect of diminishing momentum. Among the reactions the Associates heard loud and clear in 1:1 sessions was a feeling of *us versus them*. Another obvious effect was the considerable drop off in completed surveys. Only nine participants completed the post-survey and of that group, five completed the post-PsyCap survey. The results are not statistically valid, however, of the three leaders whose PsyCap scores increased overall, these were due to increases related to hope and efficacy. Of the two whose scores decreased slightly overall, the same factors of hope and efficacy contributed to those decreases. Associates were reminded that as outsiders, some things are out of your control that may affect results.

Conclusion

CareerCycles holistic, narrative framework and method of practice (Franklin, Yanar, Feller, in press) were successfully adapted and used to execute a leadership engagement program for the leadership team of a SME manufacturing firm. Using the framework, method of practice processes, tools and experiential game from One Life Tools, Associates facilitated the identification of individual’s desired worklife changes, which in turn contributed to building trust amongst peers, and ultimately alignment with the organization’s business goals. While not all program elements worked as well as anticipated, senior management and the Associates observed and articulated specific, positive behavior changes in some key members of the leadership team over the six-month program. Similarly, leadership team members recognized changes in their own and other’s behaviors and alignment with the organization’s goals. As one participant noted at the end of a workshop, “*we can be the change!*”

Appendix

Five-Step Summary of the CareerCycles Method of Practice

- 1. Name your question**— what is the current question you want to address in your worklife?
- 2. Timeline your story**— what are the chapter headings and/or details of specific chapters of your worklife? What have you learned that relates to your current question?

-
- 3. Gather and organize**—Examine the chapters of your worklife stories and portfolio and categorize your insights on a WorkLife Sketch
 - 4. Write your WorkLife Statement**—This is a concise and empowering statement, usually one paragraph, prepared from the information and insights gathered. It has both a present- and future-orientation to guide professional and personal behavior change and forward movement.
 - 5. Live your WorkLife Statement**—used like a compass to direct day-to-day decisions and actions; assess and consider opportunities; and take inspired action as documented in the Exploration Plans.

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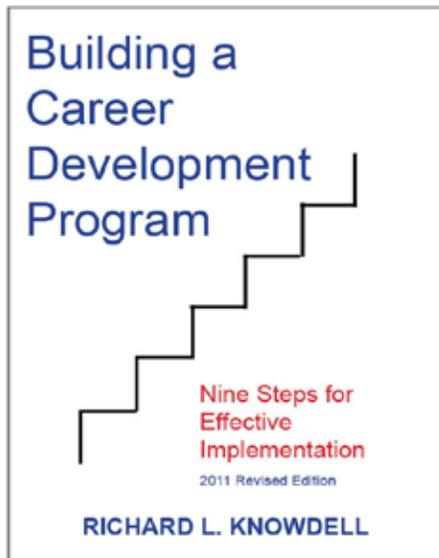
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