

Advocating for a Customer to Change Industries

INSTRUCTIONS: Use this framework to help guide a customer through the suitability process who experience in one industry and they want to transition to a new industry. If the answer to a question is “no,” the customer would not move forward with a career change. The career advisement tips are meant to help advisors advocate for the approval of the career change for the customer.

Advisor Review:

- 1 Has the customer previously received WIOA Funded training?**
Review the policy to make sure they would qualify to receive more training:
- Next Step in Career Pathway
 - Declining Industry
 - COVID Related Declining Industry

- 2 Valid reasons a customer would want a career change:**
- Future opportunities
 - Physical Health
 - Mental Health
 - Extenuating circumstances
 - Change in family situation
 - Limitations for promotion / advancement in current industry

Advisor-led Customer Review:

Skills and Experiences		
<p>Skill Matcher / Skills and Experience</p> <p>Does the customer identify the skills that will transfer to new industry?</p> <ul style="list-style-type: none">• Optional Task: If customer is struggling to identify skills, have customer review a job lead in current industry and new industry, compare the skills listed and see how they overlap. <p><input type="checkbox"/> no (stop here) <input type="checkbox"/> yes (continue) →</p>	<p>Resume</p> <p>Did the customer update their resume (skills, education, and experience) to make them competitive for a job in the new industry?</p> <p><input type="checkbox"/> no (stop here) <input type="checkbox"/> yes (continue) →</p>	<p>Labor Market research</p> <p>Can the customer find 3 job leads that they will qualify for based on skills, education and experience?</p> <ul style="list-style-type: none">• Career Advisement Tip: If the customer cannot find 3 job leads, direct customer to look at something more entry level or have the conversation if this is the right industry. <p>Does the job lead (3 years from now) show that the customer understands their opportunity for growth in the new industry?</p> <p><input type="checkbox"/> no (stop here) <input type="checkbox"/> yes (continue) →</p>
Financial		
<p>Monthly Expense Summary</p> <p>Does changing industries provide them more opportunity (now or in future)?</p> <ul style="list-style-type: none">• Career Advisement Tip: If not, is the customer aware of this? Does the customer know when they will increase their income? <p><input type="checkbox"/> no (stop here) <input type="checkbox"/> yes (continue) →</p> <p>Does the customer have the support system in place to be successful in changing industries (childcare, finances for housing etc.)?</p> <p><input type="checkbox"/> no (stop here) <input type="checkbox"/> yes (continue) →</p>		
Training Provider Research		
<p>Training Provider Research Form</p> <p>Did the customer complete the training provider research?</p> <p><input type="checkbox"/> no (stop here) <input type="checkbox"/> yes (continue) →</p>		
Goals		
<p>Career and Development Goals</p> <p>Did customer draft strong (well thought out) short-term and long-term goals for career change and training?</p> <ul style="list-style-type: none">• Career Advisor Tip: Goals should show customer understands career pathway in that industry. If customer does not make strong goals at first, work with them to strengthen goals• Optional Task: If you feel like your manager will need additional evidence for a career change, work with the customer to draft a letter that explains their reason for a career change and how this career change will help them achieve their goals. <p><input type="checkbox"/> no (stop here) <input type="checkbox"/> yes, move forward with career change!</p>		