



2022 Regions IV-VIII Virtual Meeting “CREATE” Session Template¹

Building a Customer Engagement Strategy*

Introduction: *You are Miranda’s caseworker. Miranda has two children ages 4 and 7. She is a high school graduate and has some work experience in retail. She has a history of depression and has not worked during the COVID-19 pandemic. As part of her case plan, she has participated in some job search activities. Today, you are scheduled to meet with Miranda for your regularly scheduled check-in. While you can meet with her in person, she has requested your meetings occur by phone or video call only. Today you hope to discuss her job search efforts as they seem to have stalled—you will be meeting via a video call.*

Question #1: What are some things you can do before your meeting with Miranda to promote an environment that feels safe, is collaborative, and supportive?

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The Check-In Discussion: *As the conversation begins, you have Miranda’s case plan in front of you and you review her goals and responsibilities. You suggest you and she brainstorm ideas about job search activities—knowing that Miranda’s efforts have stalled. She declines, saying that she feels like she has looked everywhere she could. She also notes that the number of COVID cases in your community are on the rise and that she is concerned that businesses may lockdown again. She shares that maybe she should wait and see as she doesn’t feel comfortable going into a place of work.*

Question #2: What additional information do you want to gather from Miranda at this point to help discern what may be at the root of her reluctance or concern about continuing her job search?

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The Discussion Continues: *You gather some additional information from Miranda to help you understand her concerns and reluctance to enter the workforce. You express a desire to help Miranda explore ways to help overcome her concerns as well as identify potential services that may support her. You notice that Miranda at this point has turned off her camera. She sounds agitated and expresses that she needs to continue to receive her cash assistance, but she doesn’t want to go into a place of work.*

¹ This template will be used during a brainstorming “create” session among peer programs during the regional meeting. Participants do not need to complete it in advance nor is there any other pre-work relating to it. Programs will complete this template together during the meeting with the support of a moderator/note-taker. It is being shared in advance for participants’ awareness only and for those interested in jotting down their own takeaways during the session and/or those who are joining by phone.



Question #3: What conversational strategies could you use (or what should you say) to help Miranda explore, address, and overcome her concerns?

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Wrapping Up: *Miranda turns her camera back on and begins to open up more. You need to wrap up the conversation soon but want to be sure you share some opportunities for additional supports for Miranda to consider and engage.*

Question #4: As you conclude the conversation, what services or supports could you offer to Miranda to promote her ongoing engagement in job search or other work activities?

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**The scenario in this exercise is hypothetical and not based on a specific person.*