

Case Management II

Managing the Counseling Process

- ### Case Management II:
- Organization
 - Time Management
 - Thorough-Orderly-Complete
 - Tracking and Follow-up
 - Evaluation and Improvement

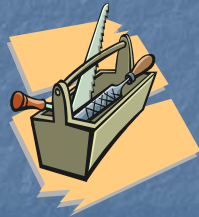
Organization

Organization

- Why is Organization important?
 - Locate items
 - Confidence and control
 - Confidentiality
 - Minimize distractions
 - Efficiency
 - Professionalism

Organization

- Does organization come naturally to you?
- If not, what's in your toolbox?
- What is your department's organizational environment?



Organization

- Organize your:
- Physical surroundings
 - Your thoughts, and
 - Thought process



Organization

- To Increase Your Organization:
 - Understand expectations of your job
 - Know your natural level
 - Take one opportunity at a time
 - Seek best practices
 - Filing and follow-up system

Time Management

Time Management

- What is the value of managing your time?
 - Get more done
 - Not feeling tired at the end of the day
 - Help more clients
 - Business growth opportunity
 - Capacity to take on more
 - Helps balance work and family
 - More productive

Time Management



Do you...

- Accomplish what you intend to?
- Feel always behind?
- Struggle to meet deadlines?
- Feel exhausted at day's end?



ARE YOU READY FOR A CHANGE??

Time Management

To Improve Your Time Management :

- Examine your workload
- Understand your key deliverables
- Come in with a plan
- Utilize planning tools
- Control distractions
- Know the value of "no"



Thorough-Orderly-Complete

Thorough-Orderly-Complete

- Why is it important to be Thorough, Orderly and Complete?
 - Responsibility to our clients
 - Responsibility to our employer
 - Responsibility to ourselves

Thorough-Orderly-Complete

According to Webster....



Thorough-Orderly-Complete

- **Thorough:** complete; absolute
- **Order:** to arrange; to systemize; tidy
- **Complete:** finished; no part lacking; to fulfill or accomplish

Thorough-Orderly-Complete

Thorough, Orderly & Complete means:

Taking a systematic approach to your work, paying careful attention to how you're doing your work so that nothing important is missed in the process, and making sure that your task is worked from beginning to end.

Tracking and Follow-up

Tracking & Follow-up

Important to our Business...

- Funding
- Staffing
- Planning
- Responsiveness

Tracking & Follow-up

Tracking and Follow-up Tools:

- Begin with a written plan
- Establish milestones for expected progress
- Document ongoing communication
- Use a filing system
- Use systematic approach to capture data

Evaluation and Improvement

Evaluation & Improvement

According to Webster...



Evaluation: "to appraise or determine the value of"

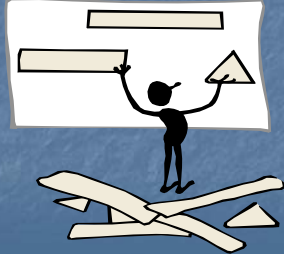
- *Is this worthwhile?*
- *Are we really helping?*
- *Are we contributing to our community?*
- *Are we benefiting our organizations?*



Evaluation & Improvement

Process:

"A method of operation"



Evaluation & Improvement

Small changes over time:



BIG CHANGES



Evaluation & Improvement

Be your own "Consultant":

- Cultivate and communicate
- Consider all suggestions
- Cross-train
- Consider the work of others
- Focus on one process
- Keep looking!

Remember...

1. Organize your physical environment, Your thoughts and thought processes
2. Understand your key deliverables
3. Develop a work system that WORKS for you; pay careful attention to your work, and complete your work from beginning to end.

Remember...

4. Tracking and follow-up begins with a written plan and clear goals – it is critical to clients and your business.
5. Evaluation and process improvement in ongoing. Your clients and your business benefit from your efforts and creativity.
