

## PART ONE

---

# LAYING THE GROUNDWORK

The exercises in this manual are meant to accompany the fifth edition of *THE SKILLED HELPER* by Gerard Egan (Brooks/Cole Publishing Company, Pacific Grove, California, 1994). The four parts of the manual – I. Laying the Groundwork, II. Basic Communication Skills for Helpers, III. Stage I of the Helping Model and Advanced Communication Skills, and IV. Helping Clients Develop Programs for Constructive Change – correspond to the four parts of the text. The "sections" of the manual correspond to the chapters of the book. The exercises themselves are numbered consecutively throughout the text.

### Section 1 INTRODUCTION

You may or may not intend to become a professional helper. Whether you do or not, learning the model, methods, and skills of *The Skilled Helper* can help you become more effective in interactions between yourself and others in all the social settings of life including family, friendship groups, and work settings.

The sections dealing with what helping is all about and the goals of helping are the most important parts of Chapter One. It is important that you understand what helping is all about in order to get the most out of doing these exercises.

---

#### EXERCISE 1: UNDERSTANDING WHAT HELPING IS ALL ABOUT

1. Read the sections dealing with what helping is all about, the goals of helping, and helping as a learning process.
2. Picture yourself talking with someone with whom you are about to establish a helping relationship.



3. **Personal Problem Solving.** You can use these exercises to become a better problem manager and opportunity developer in your own life.

4. **Client Participation.** You can help clients use these exercises selectively to explore and manage their own problems in living more effectively. These exercises provide one way of promoting client participation in the helping process.

5. **Training Clients in Problem Management.** You can help clients use these exercises to learn the skills of problem management themselves. Training in problem-management skills encourages self-responsibility in clients and helps make them less dependent on others in managing their lives.

## A TRAINING PROGRAM FOR HELPERS

The following are standard steps in a skills-training program:

1. **Cognitive Understanding.** Develop a cognitive understanding of a particular helping method or the skill of delivering it. You can do this by reading the text and listening to lectures.

2. **Clarification.** Clarify what you have read or heard. This can be done through instructor-led questioning and discussion.

The desired outcome of Steps 1 and 2 is **cognitive clarity**.

3. **Modeling.** Watch experienced instructors model the skill or method in question. This can be done "live" or through films and videotapes.

4. **Written Exercises.** Do the exercises in this manual that are related to the skill or method you are learning. The purpose of this initial use of the method or skill is to demonstrate to yourself that you understand the helping method or skill enough to begin to practice it. The exercises in this manual are a way of practicing the skills and methods "in private" before practicing them with your fellow trainees. They provide a behavioral link between the introduction to a skill or method that takes place in the first four steps of this training format and actual practice in a group.

The desired outcome of Steps 3 and 4 is **behavioral clarity**.

5. **Practice.** Move into smaller groups to practice the skill or method in question with your fellow trainees.

6. **Feedback.** During these practice sessions, evaluate your own performance and get feedback from a trainer and from your fellow trainees. This feedback serves to confirm what you are doing right and to correct what you are doing wrong. The use of video to provide feedback is also helpful.

The desired outcome of Steps 5 and 6 is **initial competence** in using the model and in the skills that make it work.

7. **Evaluating the Learning Experience.** From time to time stop and reflect on the training process itself. Take the opportunity to express how you feel about the learning program and how you feel about your own progress. While Steps 1 through 6 deal with the task of learning the helping model and the methods and skills that make it work, Step 7 deals with group maintenance, that is, managing the needs of individual trainees. Doing this kind of group maintenance work helps establish a learning community.

8. **Supervised Practice with Actual Clients.** Finally, when it is deemed that you are ready, apply what you have learned to actual clients. Supervision is an extremely important part of the learning process. Indeed, effective helpers never stop learning about themselves, their clients,

and the helping process itself.

The desired outcome of Steps 7 and 8 is **proficiency**.

The program in which you are enrolled may cover only a few of these steps. Comprehensive programs for training professional helpers must eventually include all steps.

### DIFFERENT WAYS OF USING THESE EXERCISES

The way you use these exercises depends on the kind of training program you are in. The approach may be academic or experiential.

- **Academic Programs.** If the program is more or less academic in nature, then you can use these exercises to provide yourself with a *behavioral* feel for the model, methods, and skills involved in skilled helping. In that case, you would skip the exercises or the parts of the exercises that demand interaction with others. Even if your program has an academic cast to it, you might want to get a learning partner and share the learnings you glean from these exercises. One way of learning the stages and steps of this helping model is to apply them to your own problems and concerns first. Applying what you are learning to the problems and unused opportunities in your own life is often a distinct benefit.
- **Experiential Training Programs.** If your program is experiential in nature, then these exercises can help you prepare for involvement with your co-learners. In experiential programs the instructor usually coordinates reading, doing these exercises, and practice involving other members of the group.

There are various approaches in an experiential program. You may role play certain kinds of clients or you may work on your own real issues or you may do a combination of both.

- **Role Playing.** In experiential programs you are going to be asked to act both as helper and as client in practice sessions. In the written exercises in this manual, you are asked at one time or another to play each of these roles. Role playing is not easy. It forces you to get "inside" the clients you are playing and understand their concerns as they experience them. This can help you become more empathic.
- **Dealing with Real Issues.** Role playing, while not easy, is still less personally demanding than discussing your own real concerns in practice sessions. Under certain conditions, the training process can be used to look at some of the real problems or concerns in your own life, *especially issues that relate to your effectiveness as a helper*. For instance, if you tend to be an impatient person — one who places unreasonable demands on others — you will have to examine and change this behavior if you want to become an effective helper. Or, if you are very nonassertive, this may assist you in helping clients challenge themselves.

Another reason for using real problems or concerns when you take the role of the client is that it gives you some experience of **being** a client. Then, when you face real clients, you can appreciate some of the misgivings they might have in talking to a relative stranger about the intimate details of their lives. Other things being equal, I would personally prefer going to a helper who has had some experience in being a client.

If what you find out about yourself through these exercises is not to be shared with others, then dealing with real issues is not a concern. However, if you are going to talk about personal issues in the training sessions, you should do so only under certain conditions:

- **A Safe and Productive Training Group.** Dealing with personal concerns in the training sessions will be both safe and productive if you have a competent trainer who provides adequate supervision, if the training group becomes a learning community that provides both support and reasonable challenge for its members, and if you are willing to discuss personal concerns. Self-disclosure will be counterproductive if you let others extort it from you or if you attempt to extort it from others. Your self-disclosure should always remain appropriate to the goals of the training group. Extortion, "secret-dropping," and dramatic self-disclosure are counterproductive.
- **Adequate Preparation for Self-Disclosure.** If you are to talk about yourself during the practice sessions, you should take some care in choosing what you are going to reveal about yourself. Making some preparation for what you are going to say can prevent you from revealing things about yourself that you would rather not discuss in a training group.

The self-exploration exercises in Appendix One will help you discover and explore the kinds of concerns that you can safely deal with in an experiential training group.

### **A CAUTION: EXERCISE MANUAL AS TOOL**

This manual should be used to the degree that it helps you develop a working knowledge and behavioral feel for essential helping methods and skills. It is not an end in itself. Trainees learn in different ways and at different rates. If you already have a particular skill, then working through an exercise to acquire that skill will be tedious and self-defeating. If doing two items in an exercise is enough to give you an understanding and behavioral feel for the method or skill in question, then doing ten items will prove to be equally tedious and self-defeating. In sum, doing these exercises just to do them could leave a bad taste in your mouth for helping itself.

Throughout this manual you are urged to share your responses and get feedback from a learning partner. In classes based on an experiential learning approach, the instructor often provides a "learning from one another" structure. But if you are using these exercises on your own in a more academic approach or if an interactive structure is not provided, then your learning through these exercises will be enhanced if you find a compatible learning partner or join a "self-managed" group of learners. Learning helping skills is as much a social exercise as is helping itself. Finding a forum in which you can explore these exercises in a give-and-take fashion is an essential enhancement to your learning.

### **GIVING FEEDBACK TO SELF AND OTHERS**

If you are working with a learning partner or if you are in an experiential training group, you will be called on to give feedback both to yourself and to your co-learners on how well you are learning and using helping methods and skills. Giving feedback well is an art. Here are some guidelines to help you develop that art.

1. **Keep the goal of feedback in mind.** In giving feedback, always keep the generic goal of feedback in mind: To help the other person (or yourself, in the case of self-feedback) do a better job. Improved performance is the goal. Applied to helping, this means providing the kind of feedback to yourself and your co-learners that will help you become better helpers. Feedback will help you learn every stage and step of the model.

2. **Give positive feedback.** Tell your co-learners what they are doing well. This reinforces useful helping behaviors. "You leaned toward him and kept good eye contact even though he became very intense and emotional. Your behavior sent the right 'I'm still with you' message."

3. **Don't avoid corrective feedback.** To learn from our mistakes we must know what they are. Corrective feedback given in a humane way is a powerful tool for learning. "You seem reluctant to challenge your clients. For instance, Sam [the client] didn't fulfill his contract from the last meeting, and you let it go. You fidgeted when he said he didn't get around to it."

4. **Be specific.** General statements like "I liked your style in challenging your client" or "You could have been more understanding" are not helpful. Change them to statements such as, "Your challenge was helpful because you pointed out how self-defeating her internal conversations with herself are and hinted at ways she could change these conversations." Or, "Your tone was harsh, and you did not give him a chance to reply to what you were saying."

5. **Focus on behavior rather than traits.** Point out what the helper does or fails to do. Do not focus on traits or use labels such as, "You showed yourself to be a leader" or "You're still a bumbler." Avoid using negative traits such as "lazy," "a slow learner," "incompetent," "manipulative," and so forth. This is just name calling and creates a negative learning climate in the group. The following statements deal with specific behaviors rather than traits: "You let him criticize you without becoming defensive; he listened to you better after that" or "You did not catch her core message; in fact, you seem to have difficulty in listening well enough to catch your clients' core messages." Such statements deal with specific behaviors rather than traits.

6. **Indicate the impact of the behavior on the client.** Feedback should help counselors-to-be interact more productively with clients. It helps, then, to indicate the impact of the helper's behavior on the client. "You interrupted the client three times in the space of about two minutes. After the third time, she spoke less intensely and switched to safer topics. She seemed to wander around."

7. **Provide hints for better performance.** Often, once helpers receive corrective feedback, they know how to change their behavior. After all, they are learning how to help in the training program. Sometimes, however, if the helper agrees with the feedback but does not know how to change his or her behavior, suggestions or hints on how to improve performance are useful. These, too, should be specific and clear. "You are having trouble providing your clients with empathy because you allow them to talk too long. When they go on and on, they make so many points that you don't know which to respond to. Try 'interrupting' your clients gently so you can respond to key messages as they come up."

8. **Be brief.** Feedback that is both specific and brief is most helpful. Long-winded feedback proves to be a waste of time. A helper might need feedback on a number of points. In this case, provide feedback on one or two points. Give further feedback later on. In general, do not overload your co-learners with too much feedback at one time.

9. **Use dialogue.** Feedback is more effective if it takes place through a dialogue between the giver and receiver, a brief dialogue, of course. This gives the receiver an opportunity to clarify what the feedback giver means and to ask for suggestions if he or she needs them. A dialogue helps the receiver better "own" the feedback.

## Section 2

### THE STAGES AND STEPS OF THE HELPING PROCESS

Here is a brief outline of the skilled-helper model. It focuses on problem management and opportunity development. In order to see this model illustrated through a case, read Chapter Two of *The Skilled Helper* (5th edition, 1994).

#### STAGE I: THE CURRENT SCENARIO "WHAT'S GOING ON?"

##### Helping Clients Explore Problems and Unused Opportunities

Clients can neither manage problem situations nor develop unused opportunities unless they identify and understand them. Exploration and clarification of problems and opportunities take place in Stage I. This stage deals with the current state of affairs, that is, the problem situations or unused opportunities that prompt clients to come for help. This stage includes the following steps:

1. **Help clients tell their stories.** First of all, clients need to talk about their problems and concerns, that is, tell their stories. Some do so easily, others with a great deal of difficulty. You need to develop a set of attitudes and communication skills that will enable you to help clients reveal problems in living and unused potential. This means helping clients find out what's going wrong and what's going right in their lives. Successful assessment helps clients identify both problems and resources. It also helps clients spell out problem situations in terms of specific experiences, behaviors, and feelings.
2. **Help clients challenge their blind spots and develop new perspectives.** This means helping clients see themselves, their concerns, and the contexts of their concerns more objectively. This enables clients to see more clearly not only their problems and unused opportunities, but also ways in which they want their lives to be different. Your ability to help clients challenge themselves throughout the helping process adds a great deal of value.
3. **Help clients focus on substantive problems.** This means helping clients identify their most important concerns, especially if they have a number of problems. Effective counselors help clients work on "high-leverage" issues, that is, issues that will make a difference in clients' lives.

#### STAGE II: DEVELOPING A PREFERRED SCENARIO "WHAT DO YOU REALLY WANT?"

##### Helping Clients Set Goals That Make a Difference

Once clients understand either problem situations or opportunities for development more clearly, they often need help in determining what they want. They need to develop a preferred scenario, that is, a picture of a better future, choose specific goals to work on, and commit themselves to them. For instance, at this stage a troubled married couple is helped to outline what a better marital relationship might look like. Throughout the counseling process, rusty client imaginations need stimulating.

1. **"What do you want?" Help clients develop a range of possibilities for a better future.** If a client's current state of affairs is problematic and unacceptable, then he or she needs to be helped to conceptualize or envision a new state of affairs, that is, alternate, more acceptable possibilities. For instance, for a couple whose marriage is coming apart and who fight constantly, one of the elements of the new scenario might be fewer and fairer fights. Other possible elements of this better marriage might be greater mutual respect, more openness, more effectively managed conflicts, a more equitable distribution of household tasks, and so forth. Separation or even divorce might be considered if differences are irreconcilable and if the couple's values system permits such a solution.

2. **"What do you really want?" Help clients translate preferred-scenario possibilities into goals.** Once a variety of preferred-scenario possibilities — which constitute possible goals or desired outcomes of the helping process — have been generated, it is time to help clients choose the possibilities that make most sense for them and turn them into an agenda, that is, a goal or a "package" of goals to be accomplished. A new scenario is not a wild-eyed, idealistic state of affairs but rather a conceptualization or a picture of what the problem situation would be like if improvements were made. The agenda put together by the client needs to be viable, that is, capable of being translated into action. It is viable to the degree that it is stated in terms of clear and specific outcomes and is substantive or adequate, realistic, in keeping with the client's values, and capable of being accomplished within a reasonable time frame.

3. **"What are you willing to pay for what you want?" Help clients commit themselves to the goals they choose.** Problem-managing goals are useless if they are not actively pursued by clients. They need to determine what they are willing to pay for a better future and then search for incentives to help them move forward. The search for incentives is especially important when the choices are hard. How are truants with poor home situations to commit themselves to returning to school? What are the incentives for such a choice? Most clients, like most of the rest of us, struggle with commitment.

### **STAGE III: GETTING THERE**

#### **"WHAT DO YOU NEED TO DO TO GET WHAT YOU WANT?"**

#### **Helping Clients Formulate Strategies and Plans for Constructive Change**

Discussing and evaluating preferred-scenario possibilities and choosing goals — the work of Stage II — determine the "what" of the helping process, that is, what must be accomplished by clients in order to manage their lives more effectively. Stage III deals with how goals are to be accomplished. Some clients know what they want to accomplish but need help in determining how to do it.

1. **Help clients brainstorm a range of strategies for accomplishing their goals.** In this step clients are helped to discover a number of different ways of achieving their goals. The principle is simple: Action strategies tend to be more effective when chosen from among a number of possibilities. Some clients, when they decide what they want, leap into action, implementing the first strategy that comes to mind. While such a bias toward action may be laudable, the strategy may be ineffective, inefficient, imprudent, or a combination of all three.

2. **Help clients choose action strategies that best fit their needs and resources.** If you do a good job in the first step of Stage III, that is, if you help clients identify a number of different ways of achieving their goals, then clients will face the task of choosing the best set. In this step your job is to help them choose the strategy or "package" of strategies that best fits their



preferences and resources. This tailoring of action strategies is important. One client might want to improve her interpersonal skills by taking a course at a college while another might prefer to work individually with a counselor while a third might want to work on his own.

3. **Help clients draw up a plan.** Once clients are helped to choose strategies that best fit their styles, resources, and environments, they need to assemble these strategies into a **plan**, a step-by-step process for accomplishing a goal. If a client has a number of goals, then the plan indicates the order in which they are to be pursued. Clients are more likely to act if they know what they need to do and in what order they should do it. Plans help clients develop discipline and also keep them from being overwhelmed by the work they need to do.

**CLIENT ACTION:  
THE HEART OF THE HELPING PROCESS  
Helping Clients Act Both Within and  
Outside Counseling Sessions**

Helping is ultimately about problem-managing and opportunity-developing **action** that leads to outcomes that have a positive impact on clients' lives. Discussions, analysis, goal setting, strategy formulation, and planning all make sense only to the degree that they help clients to act prudently and accomplish problem-managing and opportunity-developing goals. There is nothing magic about change; it is hard work. If clients do not act on their own behalf, nothing happens.

Two kinds of client action are important here: First, actions within the counseling sessions themselves. The nine steps described above are not things that helpers do to clients, rather they are things that clients are helped to do. Clients must take ownership of the helping process. Second, clients must act "out there" in their real day-to-day worlds. Problem-managing and opportunity-developing action is ultimately the name of the game. The stages, steps, and action orientation of the helping process make sense to the degree that they lead to constructive change.

Since all the stages and steps of the helping process can be drivers of client action, action themes will be woven into each set of exercises. This will reinforce the principle that discussion and action go hand in hand.

**CLIENT-FOCUSED HELPING**

Helping usually does not take place in the neat, step-by-step fashion suggested by the stages and steps of the helping model. With some clients you will use only parts of the model just described. But you need the working knowledge and skill to be able to use whatever part is needed by the client. Effective helpers start wherever there is a client need. For instance, if a client needs support and challenge to commit himself or herself to realistic goals that have already been chosen, then the counselor tries to be helpful at this point. The nine steps of the helping model are active ways of **being with** clients in their attempts to manage problems in living and develop unused potential.

The needs of your clients and not the logic of a helping model should determine your interactions with them. One of the overriding needs of clients, of course, is to turn discussion and analysis of problem situations into problem-managing action. If you can help clients do this, you are worth your weight in gold.

## SOME CAUTIONS IN USING THIS MANUAL

**First**, it is important to note that the exercises suggested in this manual are means, not ends in themselves. They are useful to the degree that they help you develop a working knowledge of the helping model and acquire the kinds of skills that will make you an effective helper. *They are helpful to the degree that they help you begin to become proficient in helping clients achieve the overall goals of the helping process.* Other exercises can be added, and the ones outlined here can be modified in order to achieve this goal more effectively.

**Second**, these exercises have been written as an adjunct to the text. They usually presuppose information in the text that is not repeated in the exercises. Also, the examples used in the text will help you do these exercises in a much more informed way.

**Third**, the length of training programs differs from setting to setting. In shorter programs there will not be time to do all these exercises. Nor is it necessary to do all of them. In shorter training programs, it is helpful to do at least one exercise from each of the sections on communication skills, one from each of the nine steps of the helping process, and one from the sections on action. This will help you develop a behavioral feeling for the entire helping model and not just the communication skills part of it. If the entire focus of the training program is on the communication skills that serve the helping process, you should understand that your training is incomplete. Further training in the helping model itself is needed.

**Fourth**, these exercises achieve their full effect only if you share them with a learning partner or the members of your training group and receive **feedback** on how well you are learning the model and the skills that make it work. Your instructor will set up the structure needed to do this. Since time limitations are always an issue, learning how to give brief, concise, behavioral feedback in a humane, caring way is most important.

### Section 3 VALUES IN HELPING RELATIONSHIPS

It is important for you to take initiative in determining the kinds of values you want to pervade the helping process and relationship. Too often such values are afterthoughts. The position taken in Chapter Three of the text is that values should provide guidance for everything you do in your interactions with clients.

As indicated in the text, the values that are to permeate your helping relationships and practice must be owned by you. Learning about values from others is very important, but mindless adoption of the values promoted by the helping profession without reflection inhibits your owning and practicing them. You need to wrestle with your values a bit to make them your own. Second, your values must actually make a difference in your interactions with clients. That is, they must be values-in-use and not merely espoused values. Your clients will get a feeling for your values, not from what you say but from what you do.

---

#### EXERCISE 2: WHAT IF I WERE A CLIENT?

1. Picture yourself as a client. Think of some of the problems you have had to grapple with or

are struggling with now. Then picture yourself dealing with these with a counselor. Then ask yourself these questions. Jot down words, phrases, or simple sentences in response.

a. What would I want to get out of seeing a helper?

---

---

---

---

---

b. What would I want the helper to be like?

---

---

---

---

---

c. How would I want to be treated?

---

---

---

---

---

2. Share your statements with a learning partner. Note both the similarities and the differences.
3. Finally, read Chapter Three in *The Skilled Helper, Building the Helping Relationship: Values in Action*. This chapter deals with values that should permeate the helping process together with a preliminary consideration of the relationship between client and helper. Compare the values implicit in your answers to the above questions with the values outlined in Chapter Three.



---

**EXERCISE 4: EXPLORING YOUR ACTION ORIENTATION**

1. Read Chapter Four in the text. It deals with the kind of action orientation needed by helpers and clients alike and discusses some of the blocks to problem-managing action.

In the following example, a counselor trainee discusses ways in which she procrastinates and outlines a project she has been putting off.

**Example:** Dahlia, 55, whose children are now grown, has returned to school in order to become a counselor. She has this to say about her action orientation.

*Chronic Procrastination Scenario.* "My husband is in business for himself. I take care of a lot of the routine correspondence for the business and our household. Often I let it pile up. The more it piles up, the more I hate to face it. On occasion, an important business letter gets lost in the shuffle. This annoys my husband a great deal. Then with a great deal of flurry, I do it all and for a while keep current. But then I slide back into my old ways. I also notice that when I let it pile up I waste a lot of time reading junk mail – catalogs of things I'm not going to buy, things like that."

*A Project Being Put Off.* "I have an older sister who is a widow. She has one autistic child, nearly 20 now, who is at home. He goes to a school for autistic citizens – it's not just kids – and is gone several hours every week day. Lately, he is becoming more difficult to manage. He has temper outbursts and things like that. This puts a great deal of stress on my sister. She's much more timid than I am. The day will come when she can no longer take care of him. I have told her that I would help her in the whole process of placing him in an institution of some kind. I know she can use my help. If I don't do anything, things will just get worse. One of my major concerns is ending up doing something *for* my sister. I have to do whatever I'm going to do *with* her. I've been putting off doing anything about it because I know it will be extremely difficult for her. It's not my favorite project. I think about it at least once a day, then I put it out of my mind."

2. Like Dahlia, identify one or more ways in which you chronically put off action.

---

---

---

---

---

3. Like Dahlia, describe a project that you have been putting off.

---

---

---

---

---

---

4. Get together with a learning partner and tell each other what you learned about yourself and your "bias toward action" from doing steps 2 and 3.

---

**EXERCISE 5: EXPLORING THE SELF-STARTER IN YOURSELF**

While all of us have a tendency to put things off, we also have the possibility of become self-starters. Self-starters move to problem-managing and opportunity-developing action without being influenced, asked, or ordered to do so. Skilled helpers are, ideally, self-starters who help clients explore self-starting possibilities in themselves. Read the following example.

**Example:** Dahlia, in searching for the self-starter within herself, discovered the following:

- I never put off the things I like to do. For instance, I like the volunteer work I do at the hospital. No one has to put pressure on me to show up. I even volunteer for added special projects. I also plan holidays for the family very carefully. Planning them is half the fun.
- I spent a week at a resort one year that had no television. I did all sorts of creative things with the extra time I had. I finished reading a biography that I couldn't find the time to read back home. I learned that I'm a much better self-starter when I get rid of some of the clutter. Television for me is part of the clutter.
- Once I'm into a task I've been putting off, I keep going. Just starting is the hard part. When I keep putting something off, I'm miserable. I'm beginning to learn that "JUST DO IT!" should be my motto.

1. Describe the ways or the areas of life in which you are a self-starter.

---

---

---

---

---

---

---

---

2. Share what you have learned about yourself with a learning partner. See if some of your partner's learnings apply to you.