

APTAC Body of Knowledge Competency Guide

F. Communication Skills

F.1 Counseling Skills

Description

The Body of Knowledge description [Section A.4 Counseling Steps/Process and Tips](#), contains guidelines on the process and the necessary steps to take when counseling clients. This section presents how the tasks within the counseling process can be most effectively performed during the counseling sessions. The cliché “*every client is different*” is very important here. The individual client’s needs and goals need to be understood in order to work with them on a beneficial strategic plan. However, the following list of skills and traits generally exemplify a good PTAC counselor. These skills will have a positive benefit on client interaction and outcomes.

POSITIVE PERSONALITY QUALITIES

First, a counselor must have some positive personality qualities to be effective. Traits such as empathy, patience, tact, and thinking quickly on one’s feet to adapt to changing circumstances are all skills that will make for a successful counselor

COMMUNICATING

One cannot be an effective counselor without the requisite communications skills. Active listening, reflection on the client, understanding non-verbal communication, asking open-ended questions, and succinctly addressing client questions and concerns are all good skills to have when speaking with a client. Communication takes at least two people: one to talk and one to listen. While it may appear that listening is a subset of communications, in the client counseling arena, they are two very distinct skills which, when combined, produce outcomes greater than the sum of the two parts.

PREPARING FOR YOUR COUNSELING SESSION

Always have a clear objective or agenda for the meeting based on the client’s needs. Remember that the purpose of a counseling session is to provide information and assistance that will benefit the client and move them closer to their contracting goals. Always look at the session from the client’s perspective.

TEACHING COMPLEX TOPICS TO NOVICE CLIENTS

One of the most challenging aspects of a counseling session is to teach complex subject matter to clients, especially when the information is completely foreign to them. Below are tips to follow when counseling clients new to contracting:

- Avoid using acronyms, unless you explain them.
- Define industry terms, such as “set-aside,” “prime contractor,” “sole source,” etc...

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- Employ chunking, a method of presenting information which splits concepts into small pieces or “chunks” of information to make understanding faster and easier.
- Explain the importance and relevance of each subject matter – “*Why is SAM registration required?*” “*Why should I certify as a WOSB?*” Etc...
- Remember how complex this information sounded to you when you first became a counselor! Keep it as simple as possible.
- Use instructional scaffolding, such as templates, guides, and additional resources to promote autonomous learning.
- It is more worthwhile to teach your client to do things than to do everything for them. Remember the proverb: Give a man a fish and you feed him for a day. Teach a man to fish and you feed him for a lifetime.
- Refer them to online resources and webinars

Remember that each client has different needs, so be sure to tailor your counseling style to the experience level of your client.

PROPERLY ENDING THE SESSION

Ending skills are the final piece of the puzzle. As a PTAC counselor, a mark of a great counseling session is ending with clear goals and tasks in mind. Some of these tasks may be on the client (collecting documentation, reading the Request for Proposal), some may be on the counselor (changing information in the System for Award Management [SAM], obtaining contact info for the Office of Small and Disadvantaged Business Utilization at the local Army post, etc.), but the important thing is that they are known by both parties with a time-frame in mind. These goals don't have to be lofty or grand, just doable. Complete the tasks as soon as possible, rather letting them rest in a to-do pile.

DOCUMENTING THE SESSION

Be sure to properly document your counseling session in your center's CRM database. Include adequate notes on topics discussed during the session, including assigned action items and strategy going forward.

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- Chunking ([http://en.wikipedia.org/wiki/Chunking_\(writing\)](http://en.wikipedia.org/wiki/Chunking_(writing)))
- Communication Skills (<http://www.wikihow.com/Develop-Good-Communication-Skills>)
- Instructional Scaffolding (http://en.wikipedia.org/wiki/Instructional_scaffolding)
- Listening Skills (<http://www.skillsyouneed.com/ips/listening-skills.html>)
- SCAA RFP (<http://www.dla.mil/SmallBusiness/Pages/SCAA.aspx>)