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## Checklist for New Costumers

The “New Costumer Checklist” is a worksheet that outlines 16 steps for an employment specialist to follow when meeting a new costumer. Employment specialists can check off each step of the tool as completed to ensure that comprehensive protocols are followed. At the end of the checklist is a one-page description that employment specialists can use with new costumers to get to know them better and learn important information that could later guide a job match.

This checklist can be used with new costumers to help set the foundation for a strong working relationship with the costumer. The employment specialist’s primary objective is to assist the costumer in obtaining their desired work goals, which requires the employment specialist to be mindful of implementing best practices for achieving a customer-driven approach to supported employment (Brooke et al., 1995). For many individuals with disabilities, Competitive Integrated Employment (CIE) is the preferred employment option because it provides opportunities for social engagement and positively impacts feelings of purpose, belonging, and equality (Voermans et al., 2019). However, finding the right job match can be a challenge. Employment specialists must employ a multitude of tools and strategies to best support their costumers in obtaining successful employment within the community.

The first step toward achieving success starts with the employment specialist gathering the necessary information to better understand the costumer and their desired employment outcomes. Information gathering can look different for each costumer and may vary in the length of time and the activities completed. Discussion and observations can be held with the costumer, their family, friends, teachers, and community advocates. Another critical consideration for ensuring the success of the costumer is related to benefits counseling. If the costumer is receiving any type of benefits (e.g., social security disability insurance) prior to obtaining employment, they must be equipped with the knowledge and understanding of how their benefits may be impacted once employed. Employment specialists should provide information about benefits directly to consumers or connect them with the appropriate resources to ensure they have the necessary education related to their benefits.

As the employment specialist continues to build rapport with the costumer, a vocational profile and an Individual Plan for Employment (IPE) should be developed with the information gathered. The vocational profile and IPE are tools that can offer a road map and direction for the employment specialist and costumer. These tools offer consumers the opportunity to exercise informed choice regarding employment outcomes by providing decision-making power related to the choice of service provider and employment goals. The vocational profile and IPE will also help the employment specialist take into account the individual’s strengths, interests, abilities and

concerns as they relate to employment (Beveridge et al., 2007). As employment interests and customer preferences are identified, the employment specialist can begin to establish relationships with potential employers within the community.

The employment specialist will have to build rapport and trust with respective businesses that meet the consumer's interests, with the end goal of establishing a partnership where the customer will have the opportunity to be employed. Employment specialists must invest time and energy into cultivating a strong and successful relationship by learning about the respective businesses and by seeking to understand their business needs. This can be accomplished through informational interviews conducted between the employment specialist and hiring managers, scheduled tours or situational assessments for the customer, and advocating for a working interview where the customer can demonstrate their ability to complete essential job functions of a role if needed.

After a business relationship has been established and a strong job match is identified, the employment specialist should support the customer with submitting formal applications, preparing for interviews, negotiating any necessary job accommodations, and assisting with follow-up communication. Once the customer obtains employment, the employment specialist's role in supporting the customer will shift towards "on-the-job" training and support, ensuring the customer is successful in their new role.

Using the "New Customer Checklist" can help make sure all of the procedures described above are implemented with fidelity for every customer seeker CIE.

## References

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