EMPLOYEE ASSISTANCE REPORT

24 years of service!

supporting EA professionals

Revisiting Crucial Components of the Intake Process

By Michael Laird, LCSW, CEAP

One of the most consequential adjustments that EAPs have had to make as a result of the COVID-19 pandemic has been the transition from face-to-face services to almost exclusive telehealth services. Frontline professionals responsible for intake have been adapting to the rapidly changing needs and concerns of clients.

Further, the pandemic has wrought an increased sense of uncertainty. Even when a caller is not seeking services for themselves, the feelings of uncertainty and sense of urgency has likely been heightened as a result of COVID.

While the client interaction during the first contact call is usually limited, the intake professional is ideally positioned to not only *ease any concerns* and facilitate a warm transition to other EA services but is also in the position to create a ***positive first impression*** that will resonate throughout the remainder of a client's experience with their EAP.

Consider Your OWN Customer Service Experiences

Consider what kind of customer service experiences YOU have had personally. Have you truly felt like a valued "customer"? Or have you been treated more like an intrusion on the other person's time – even though this individual is paid to supposedly "help" you?

Perhaps even more important, if the experience was less than positive, how did it make you feel about dealing with the same company again? *"They gave me the runaround, transferred me twice, and never did answer my question. I will NEVER do business with them again!"*

It could be the customer service rep really *tried* to help you, but it was obvious "John" wasn't trained sufficiently to be of assistance. Maybe it was "Jane's" incredibly ho-hum attitude about your problem that turned you off. You might be willing to call this firm again, but chances are you'd be hesitant.

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Customer Service Standards & the Disney Brand

Readers may be thinking, *"How is customer service related to employee assistance?"* Or *"Isn't customer service for businesses only?"*

It is true that many of us don't usually think of EA services in relation to a business model, however it is important to remember that much like a business selling products or services, we are offering services that can either be *accepted* or **declined**.

Additionally, while intake professionals are not incentivized to sell services, we want to present them in a way that allows a client to trust the intake professional and trust that the services being offered will be helpful.

The Disney brand is one of the most well-known, respected, and successful businesses in the world. Part of this success is a result of their dedication to customer service. An early consultant of Walt Disney, Dick Nunis, defined quality standards that would set Disney apart from the competition. These standards were <u>Safety, Courtesy, Show,</u> and <u>Efficiency</u>.

> *"Amidst the pandemic, the intake process continues to be much more than an interaction between the client and intake professional. It is important to see the intake process as the beginning of a larger and more interconnected process."*

Safety extends the notion that guests were to feel safe and have peace of mind while participating in the Disney attractions.

Each guest was to be treated with **Courtesy**, which meant that every guest was to be treated like a VIP and with respect and recognition for their emotions, abilities, and cultures.

Further, each guest was to be given a **Show** – seamless and exceptional entertainment.

And finally, the parks were to run **Efficiently** in order to maximize the guest's usage of the properties. These standards continue to exemplify the Disney experience today.

These same standards should also apply to EAPs. When clients are going through the intake process, we want them to feel *safe*. Our clinical backgrounds and dedication to confidentiality should help to ensure this. Clients

should also be treated with *courtesy*. A client-centered approach to each intake call will make the client feel as if he or she is the only thing that matters in that moment.

While EAPs are not in the business of entertaining others and therefore aren't responsible for putting on a "show," we *are* able to provide short-term problem resolution services. *That* is our show.

Lastly, we want to make sure that our clients are able to *efficiently* access EA services. One way to do this is through good communication.

Pandemic Insights

Amidst the pandemic, the intake process continues to be much more than an interaction between the client and intake professional. It is important to see the intake process as the beginning of a larger and more interconnected process. At the foundation of this process are the EAP's policies and procedures.

Each EAP has their own distinct set of policies and procedures that have been designed to best serve clients. *Many of these policies and procedures have*

likely been updated since the beginning of the pandemic and reflect both the organization and the unique predicaments of the employees they serve.

An understanding of this foundation is essential in order for an intake professional to conceptualize his or her role as their EAP's front line professional and adjust to sudden changes in internal policies and procedures.

Communication is Crucial

Equally challenging is the intake professional's ability to develop *effective communication* with colleagues. This communication is not one-sided. It needs to come from each staff member – clerical staff, clinical professionals, management, providers, etc. The EAP is in the business of connecting people to people. Central to this is the ability to effectively communicate in order to build the professional network necessary to deliver services to clients.

I have also found that it continues to be important to understand *who* may be calling the EAP. A good starting point is to actively engage in online cultural competency opportunities and develop your own cultural competency. Clients come from their own unique socio-economic and cultural backgrounds, which can influence how they adjust to change.

It remains best practice to have an awareness of how those different backgrounds can affect client *trust*, *communication*, and the individual's *decision* on whether or not to access EA services.

Furthermore, it is important to have an idea about *the kind of work* that clients do. This can be more difficult in larger EAPs due to the number clients served. However, having an understanding of the client's work background help intake professionals establish rapport, in addition to better understanding some of the issues that revolve around their problems and workplace stress.

Summary

Lastly, I have found that often times the best way to gain the trust of a caller is to use empathic responses during the conversation. Research scientist Melinda Hohman defined empathy as the ability "to perceive the internal frame of reference of another with accuracy, and with the emotional components and meanings which pertain thereto...Thus empathy involves understanding the world or problem as the client sees it without identifying with or taking on the problem".

We want clients to know that we are interested in how they feel and what they are going through. Most clients want to be understood. They are reaching out in the hopes of being understood. We want to be able to convey that we *do* understand during that all-important initial call.

Editor's Notebook

Whether you call it "intake," "customer service," or something else, the point is the same: The FIRST contact a prospective client has with your EAP is absolutely critical. Either it's a warm, pleasant experience that will leave the individual wanting to find out more – OR – it'll be a negative encounter that may well mean the person not seeking the use of EAP services again.

In a day and age in which "customer **service**" is often more like "customer **frustration**" with endless transfers, holds, and people on the other end who either don't understand your problem, or you can't decipher their dialect – truly EXEMPLARY customer service jumps out at people like a rose on a thorn bush or a shiny sports car in a parking lot full of subcompacts.

Especially in light of the changes brought on by the pandemic, maybe it's high time for your EAP to examine ITS intake process and see what's working and what might need improving. Thank you for your contribution, **Michael Laird**.

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As noted on **page 4**, I *greatly* appreciate all the subscribers who've come forward to renew their subscription. You have helped us financially! That said, getting more NEW subscribers before the end of the year will likely determine how long we can continue to publish *EAR* – because as it stands now, we remain "in the red."

If you enjoy reading this newsletter, why not tell others about it? Subscribing is as simple as your colleague placing a phone call to 715-445-4386 or my cell, **715-200-1143**. Even a handful of new readers could well put us "in the black." Call today!

*****

As always, we hope everyone is safe and healthy! P.S. What a bummer the Houston EAPA Conference was scrubbed. ❖

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Now more than ever, revisiting intake as a result of the COVID-19 outbreak will help to reinforce a key element of EA services. ❖

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Mindsets to Help Your Team Reboot

By Jason V. Barger

Nine out of every 10 employees say they want to work for a more meaningful culture. People want to feel appreciated, valued, and cared for. In the midst of so much angst, division, and uncertainty in the world that seems out of our control, people need to be reminded about *what is* within our control.
Teams and companies need a reboot.

Here are six mindsets to reboot your team or the team of a client.

1. **Clarity** —Is the mission clear? Are strategies for the next priorities clear? The team may not have all the answers, but with clarity comes the energy and direction on how to take the next step.

2. **Inclusivity** — Teams and organizations need to model civil, respectful dialogue, and educate people on the strengths of diversity, equity and inclusion. When teams are inclusive and welcoming, it breathes life and energy into everything.

3. **Agility** — Possibility + Adaptability is the name of the game in a changing world. Leaders have to practice an occasional reboot that allows their mind to find new ways of doing things and the courage to adapt to opportunities that emerge. If leaders return to the "this is the way we've always done it" mindset they will sit back and watch their people leave the room.

4. **Grit** — Resolve + Toughness is critical to help people navigate their way through obstacle and challenges. Leaders help their people reboot to stay focused on the present and the actions that are needed in order to take the next step.

5. **Rest** — Teams and organizations have an unhealthy association with the concept of rest. Americans last year left 768 million days of vacation on the table with their employers. That equates to nearly $66 billion of lost benefits. We've forgotten that deliberate rest is essential to elite performance.

6. **Ownership** — Accountability + Action are mindsets and "oxygen" that the best leaders and team cultures on the planet breathe. In a world where people are quick to gossip, point fingers, and be critics about what isn't working, the best leaders reboot themselves and their people and shift conversations from blame to solutions focused. ❖

Jason V. Barger is the globally celebrated author of Thermostat Cultures, ReMember *and* Step Back from the Baggage Claim *as well as the host of* The Thermostat *podcast. His latest book* Breathing Oxygen *is set to be released in early 2022. Learn more at JasonVBarger.com or on social media @JasonVBarger*

Tell a Friend about *EAR*!

Employee Assistance Report (*EAR*) has been contacting readers about renewing their subscription to this newsletter. We are GRATEFUL to those of you who gave us such a ringing endorsement!

That said, we remain on the financial cusp of whether we will be continuing to publish *EAR* beyond early 2022, and NEW subscribers will likely be the determining factor. While some of this always falls "on us" in terms of outreach, there is also nothing quite like word of mouth. So, if you enjoy reading the *EAR*, why not tell colleagues about it?! This could be either someone else with your particular EAP or a peer who works elsewhere.

It's as simple as a quick call (715-445-4386) with pertinent CC info. But they need to call NOW! (I also email invoices.) Any questions, let me know.

In the meantime, we hope everyone is safe and healthy!

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EMPLOYEE ASSISTANCE REPORT

Use Team's Emotions to Boost Creativity

If you're putting together a team for a project, you might be inclined to pick people with cheerful, optimistic dispositions and flexible thinking. But a new management study indicates your team might also benefit from people who are exactly the opposite, according to experts at Rice University, the University of Western Australia, Bond University and the University of Queensland.

The study, co-authored by Jing Zhou, at Rice's Jones Graduate School of Business, investigates the effects of "team affective diversity" on team creativity. The paper published in the *Journal of Organizational Behavior* is among the first research to reveal how, why and under what condition teams' "affective diversity" promotes team creativity.

Team members with what researchers call "negative affect" exhibit *critical* and *persistent* thinking that allows them to identify problems needing solutions, as well as to search out and critically evaluate relevant information. On the other hand, team members with "positive affect" engage in *broad* and *flexible* thinking that expands their range of information and helps them see unusual and creative connections, the researchers say.

"At any given point in time, some team members may experience positive affect such as joy and inspiration, whereas others may experience negative affect such as frustration and worry," Zhou said. "Instead of trying to homogenize team members' affect, teams should embrace affective heterogeneity."

For more information, visit the school's Rice Business Wisdom, https://business.rice.edu/wisdom. ❖

Diet Helps Your Brain

Evidence suggests that diet can be protective – or detrimental – regarding cognitive functioning and dementia, according to Claire Sexton, director of scientific programs and outreach for the Alzheimer's Association.

"While it's unlikely a single food or nutrient would have a significant beneficial effect, many observational studies find that an overall healthy dietary pattern is associated with lower risk of developing dementia and Alzheimer's," Sexton stated.

One commonly studied dietary pattern for brain health is the MIND diet (Mediterranean Intervention for Neurodegenerative Delay), based on the heart-healthy Mediterranean diet, with some added recommendations.

"The MIND diet stresses foods that are hypothesized to be beneficial to brain health, such as leafy greens, berries, and fish," Sexton explained. "Research is clear that following an overall healthy
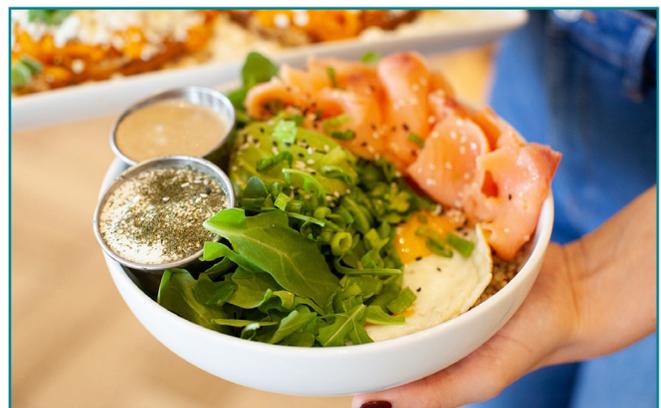
diet has positive outcomes, not just for heart health and the body but also for the brain."

Beyond diet, the brain benefits from physical and mental activity, like walking, reading, playing games, and remaining socially engaged. ❖

Source: "Heart & Nutrition Letter," June 2021, Tufts University.

Managers Dread a Remote Work Future

By Ed Zitron

In 2019, director Steven Spielberg called for a ban on Oscar eligibility for streaming films, claiming that "movie theaters need to be around forever" and that audiences had to be given "the motion picture theatrical experience" for a movie to be a movie. Spielberg's angst was about not only the threat that streaming posed to the in-person viewing experience but the ways in which the streaming giant Netflix reported theatrical grosses and budgets.

Ultimately, Spielberg balked, and his company even signed a deal with Netflix, likely because he now sees the writing on the wall: Modern audiences enjoy watching movies at home.

Parallel to Remote Work

In many ways, this fight resembles the current remote-work debate in industries such as technology and finance. Since the onset of the coronavirus pandemic, this has often been cast as a battle between the old guard and its assumed necessities and a new guard that has found a better way to get things done.

Remote work lays bare many brutal inefficiencies and problems that executives don't want to deal with because they reflect poorly on leaders and those they've hired. Remote work empowers those who produce and disempowers those who have succeeded by being excellent diplomats and poor workers, along with those who have succeeded by always finding someone to blame for their failures.

It removes the ability to *seem* productive (by sitting at your desk looking stressed or always being on the phone), and also, crucially, may reveal how many bosses and managers simply don't contribute to the bottom line. Certainly, many people need to go to a physical location to work, both for social reasons as well as for practical ones. You can't cook a burger on Slack, or clean an office on Zoom, as but two examples.

The Hard Reality

But for the tens of millions of us who spend most of our days sitting at a computer, the pandemic proved that remote work is just *work.* While many executives and managers spent the early months of the pandemic telling their employees that "remote work wouldn't work for us in the long term," they are now forced to argue with the tangible proof that remote work does in fact *work*.

Perhaps Spielberg realized that the world was evolving faster than he was, or that his judgments of streaming were antiquated and, on some level, anti-creative. Is the business world next? ❖

Ed Zitron writes the newsletter Where's Your Ed At? *and the CEO of the public relations firm EZPR. This article originally appeared in The Atlantic.*

Many Don't Report Problems to HR

American workers are increasingly fearful of employer surveillance, according to a new study by Elements Global. The nationwide analysis revealed that the top HR-related queries, besides compensation and salary discussion, center around remote and workplace monitoring. Elements Global surveyed 1,000 American workers to find out more about their fears. Highlights include:

- 2-in-3 workers aren't reporting issues to HR because they don't think action will be taken.
- Roughly half (49%) don't report issues to HR for fear of retaliation.
- 76% of workers using computers say they fear their boss monitors their communication.
- 3-in-4 remote workers are concerned their employer monitors when and how much they work.

The good news: 83% of workers say they trust their HR manager or department. However, while a majority of people say they trust HR, that doesn't mean they find HR effective, or that they don't harbor other concerns when they consider making formal complaints. Two-thirds of workers say they've neglected to report something to HR because they didn't think HR would fix the issue. The most frequently cited problems were having too much work, a personality clash and bullying.

A reluctance to make reports is not just about the specific nature of the issue, or the employee assuming that HR won't act. There's also a fear of retaliation to contend with – 49% of workers who have neglected to report something cited this fear. Given that personality clashes, bullying and sexual harassment are oft-cited issues, it's no surprise this fear of retaliation is a high bar to cross.

There is much room for progress in building trust and accountability at the center of employee-employer relationships, and the exponential rise in time spent working remotely will only make this issue more important. *The EAP can play a key role.* ❖

HHS Rescue Plan to Address Burnout

The U.S. Department of Health and Human Services (HHS) recently announced the availability of an estimated $103 million in American Rescue Plan funding over a three-year period to reduce burnout and promote mental health among the health workforce.

These investments, which take into particular consideration the needs of rural and medically underserved communities, will help health care organizations establish a culture of wellness among the health and public safety workforce and will support training efforts that build resiliency for those at the beginning of their health careers.

"This funding will help advance HRSA's mission of developing a health care workforce capable of meeting the critical needs of underserved populations," said Acting HRSA Administrator Diana Espinosa.

Source: HHS.

Virtual Care Improves, but Questions Remain

The COVID-19 pandemic reshaped the way many Americans receive health care, largely by ushering in new strategies that made telehealth easier to access. However, as policymakers wrestle with which pandemic-induced changes will remain after the crisis, health care providers are insisting that virtual care is here to stay — and clamoring for clarity as they navigate their own paths forward.

Medicare officials are proposing extending waivers to keep some telehealth services easier to access through 2023, and while that offers some stability over the coming months, the future of the field — including coverage, the types of virtual care that will be offered and how people will be able to access services — is still in transition, and the uncertainty has left telehealth companies in a quandary over how to plan for their futures.

A precarious situation even though telehealth use has urged over the past year, peaking in April 2020 but remaining 38 times above pre-pandemic levels as of February 2021, a McKinsey & Co. analysis found.

A problem lies in the fact that regulators have allowed mental health clinicians to practice telehealth across state lines during the public health emergency. The Biden administration has been extending the emergency order in 90-day increments, meaning the waiver could be revoked with little notice, disrupting patients' relationships with therapists and other behavioral health providers.

Another key question for telehealth companies is whether virtual visits will be reimbursed at the same level as in-person care.

The Centers for Medicare and Medicaid Services offered some insight into how it views the future of telehealth in a proposed rule. Under the rule, providers offering mental health care via telehealth would be required to hold in-person visits with patients every six months, and it would also limit the use of audio-only visits.

Read more at https://bit.ly/3jrn7Cx. ❖

Additional source: Morning Consult.

Sites Worth Checking Out!

One Mind PsyberGuide
https://onemindpsyberguide.org
There are so many apps out there these days! But which ones are effective? Apps and digital health resources are reviewed at this site, which includes its criteria for determining its ratings. Understanding and managing mental health are among other useful links.

Johns Hopkins: Resource Center
https://coronavirus.jhu.edu/
Johns Hopkins, experts in global public health, infectious disease, and emergency preparedness have been at the forefront of the international response to the coronavirus pandemic.

Appmkr
https://www.appmakr.com/
Everybody is downloading apps these days, but maybe you'd like to create your own app. Doing so is neither complicated nor costly. Learn more at this site.

The History of Employee Assistance Programs in the United States
https://amzn.to/2Z2KLMe
Written by Dale Masi, PhD, and sponsored by the Employee Assistance Research Foundation, this book is a long overdue exposition of all the major innovations and evolution of the EAP field. It is an essential guide for purchasers, providers, and students of EAP. ❖