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# A MANAGER'S GUIDE TO THE EAP

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# INTRODUCTION

Your Employee Assistance Program (EAP) is a work-site-based program that is designed to assist in the identification and resolution of productivity problems associated with employees who are impaired by personal concerns.

**The Employee Assistance Program (EAP) can be used as the following:**

- A confidential resource that helps employees identify and deal productively with personal problems including relationship problems, family issues, depression, stress, alcohol, drugs, legal questions and financial difficulties.
- Assistance for employees whose personal problems may be affecting their job performance.
- A resource for information on a wide variety of work-life topics.
- A tool to help you be a more effective and efficient manager.

## **Benefits of Using Your EAP Program**

You and your organization may benefit from utilizing the EAP by:

- Maintaining employee performance and productivity by offering a way for employees to address and resolve personal problems before they escalate.
- Retaining employees and enhancing positive supervisor/employee relationships.

# EAP FUNDAMENTALS

## Core EAP Concepts

The Employee Assistance Program is based on the following concepts and assumptions:

- From time to time, we all experience problems that challenge our ability to cope.
- Personal or workplace problems sometimes impact job performance.
- It is the responsibility of the manager/supervisor to address issues with the employee.
- The best ways to address these issues are to consult with a human resources representative and provide help by referring the employee to the EAP.

## Confidentiality

The EAP is a confidential service. Any contact you or your employee has with the EAP program is held in the strictest confidence. Exceptions to this rule are:

**When someone is an imminent threat to him/herself or others.** Included in this category are threats of homicide, suicide or child/elder care abuse.

**When the employee has signed a Release of Information allowing the EAP to discuss compliance to the EAP Program with the worksite when the referral to the EAP is based on job performance.** Without the employee's written permission, the EAP may not release any information to the worksite or another third party.

## Why Encourage Use of the EAP?

It is not cost effective to lose trained and experienced team members. Anyone can experience a personal problem at anytime; the EAP is available 24 hours a day, 365 days a year. Employees who receive help can be restored back to expected levels of productivity with minimal disruption.

The EAP offers to help employees and their household members for problems including:

- Marital and household
- Financial and legal
- Alcohol
- Child care and elder care
- Mental health
- Drugs

## EAP AS A MANAGER'S TOOL

In addition to providing valuable support to individuals and their families to address issues such as stress, relationships, depression or substance abuse, the EAP is an important resource for managers and supervisors. Available around the clock, the EAP can provide management consultation related to:

- Employee behavior changes

As a manager, you may witness a slight deterioration in performance or sense small behavior changes in an employee that, if left unchecked, could escalate. The EAP has experts available to consult with you on how to identify a troubled employee and best refer them to the EAP.

- Drop in performance

Sometimes performance declines to the point where a more comprehensive consultation with the EAP is appropriate. Not only can the EAP help you in coaching the individual and documenting the performance problems and attempted resolution, the EAP's management consultants can guide you in talking to the employee and formally recommending that they contact the EAP.

- Threat of violence

Violence in the workplace is always predictable and avoidable. It always results from unresolved conflict that escalates out of control. The EAP can assist you in dealing with troubled employees and resolving issues before they deteriorate into a potentially violent situation.

- Conflict resolution

Whether it is a communication problem between you and your staff or conflict between members of your work team, the EAP can coach you through handling such situations, ensuring a more productive and satisfied team.

In this workbook we will outline how the EAP can assist you to:

- recognize the warning signs of a troubled employee
- coach them through performance problems
- document issues and actions related to performance problems
- refer employees whose performance is not improving to the EAP

## TYPES OF REFERRALS TO THE EAP

### Informal Referrals

When you identify some change in performance and/or behavior, a referral to the EAP can be made early in the process. You can express your concern to the employee “informally,” without initiating the corrective action process. This type of referral is appropriate when you observe no specific work performance issues, but you are concerned by behaviors such as lack of concentration or focus. You do not counsel the employee. You only suggest that he or she might consider contacting the EAP. No information is given to you regarding your employee’s participation in the EAP.

### Formal Referrals

If performance continues to deteriorate, a formal referral to the EAP may be made. You should check your organization’s policy regarding formal referrals to the EAP before proceeding. A formal referral is a recommendation that an employee contact the EAP because of poor performance. Your part in the referral process is:

- Contact the EAP to discuss making a formal referral. Explain your concern about the particular employee, indicating the behavior problems you have documented previously.
- Together with the EAP counselor, you will devise a plan to approach the employee. You may request feedback from the EAP regarding the employee’s compliance with contacting the EAP.
- Discuss the plan with your own manager or human resource department to make sure the referral follows your company policy and procedure.
- Meet with the employee to share your concerns and ask the employee to call the EAP. Explain that participation in the program is optional and performance will continue to be monitored. You may be notified that the employee has contacted the EAP if he or she signs a Release of Information to Employer, which is obtained by the EAP.

### Mandatory Referrals

In the event of a positive drug screen or an ongoing performance problem not resolved through previous efforts, depending on your organizational policy, you may make the employee’s involvement with the EAP a condition of continued employment. You will be notified that the employee has contacted the EAP and whether the employee has been compliant with the EAP treatment recommendations if the employee signs a Release of Information to Employer. Please check your organization’s policies regarding this issue, as policies may vary by employer.

## IDENTIFYING A TROUBLED EMPLOYEE

Think about the employees that you supervise. Do any of them have any of the following characteristics?

### **Absenteeism**

- Instances of leave without prior notice
- Excessive sick leave
- Frequent Monday and/or Friday absences
- Repeated absences that follow any pattern
- Excessive tardiness, especially with an established pattern
- Leaving work early
- Unusual and increasingly improbable excuses for absences
- Higher absenteeism rate than other employees for common illnesses
- Frequent unscheduled short-term absences (with or without medical explanation)

### **“On-the-job” absenteeism**

- Continued absences from work station--more than job requires
- Taking long breaks
- Repeated physical illness on the job without medical interventions

### **Safety issues**

- Accidents on the job
- Accidents outside of work that affect job performance
- Behavior that is unsafe and that could easily cause an accident

### **Lack of concentration**

- Work requires more and more effort
- Tasks take more and more time to complete

### **Confusion**

- Difficulty recalling instructions, details, etc.
- Increasing difficulty handling complex assignments
- Difficulty recalling work errors, however, able to recount errors of co-workers

## *IDENTIFYING A TROUBLED EMPLOYEE - continued*

### **Spasmodic work patterns**

- Alternate periods of high and low productivity
- Change in the amount of effort required to meet deadlines

### **Reporting to work**

- Coming/returning to work in an obviously abnormal state (mental/physical)
- Difficulty beginning work upon arrival

### **Generally lowered job efficiency**

- Missed deadlines
- Mistakes due to inattention and/or poor judgment
- Wasting materials or resources
- Making poor decisions
- Complaints from customers or clients
- Improbable excuses for poor performance
- Increase in personal activities and phone calls

### **Poor employee relations**

- Overreactions to real or imagined criticism
- Wide swings in morale
- Borrowing money from co-workers
- Complaints from co-workers
- Unreasonable resentments
- Avoidance of associates

Total number checked: \_\_\_\_\_

If you have checked three or more behavioral changes, you have an employee with whom you should discuss job performance. If you have checked five or more changes in behavior, please contact the EAP for a consultation.



## THE FIVE-STEP PROCESS FOR MANAGING THE TROUBLED EMPLOYEE

While difficult and often uncomfortable, it is a manager's responsibility to take steps to correct performance problems. These five steps will help you do just that.

### **STEP 1: Recognition**

You have recognized a pattern of poor performance extending over a period of time. Inform the employee of the problem and allow some time for improvement. Be specific about the behaviors or performance issues that you have identified. It's important to focus.

### **STEP 2: Observation**

This is the observation of the pattern of behavior and an exploration of its impact over time. When shared with the employee, this information will assist him in the problem-solving process.

### **STEP 3: Documentation**

This involves keeping a written log of the observations made over time, which serves to help the manager and employee see exactly what is going wrong.

### **STEP 4: Feedback**

Using the information from the written log, the manager/supervisor presents it back to the employee. Then, with the employee, the manager helps to define the specific problems.

### **STEP 5: Resolution**

Use the documented information and discussion with the employee to develop a problem statement that will eventually lead to a resolution of the problem. That's the ultimate goal – resolution of the problem. By working with the employee, the manager/supervisor can look at possible options for solving the defined problem. Will additional training help? Is this a point where progressive discipline is needed? Would a referral to the EAP help?

After establishing mutually agreed upon performance expectations and criteria for determining success, the manager/supervisor continues to monitor performance and the employee implements his or her planned set of options.

*The following worksheet may be used for organization and planning purposes.*

## EMPLOYEE ASSISTANCE PROGRAM (EAP)

### CORRECTING PERFORMANCE PROBLEMS: A SUPERVISOR'S WORKSHEET

Employee Name: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor Name: \_\_\_\_\_

#### I. Preparation: Concerning Work Performance Behavior

How does the employee's behavior impact work outcome, teams, the organization, the customer?

Does the employee have the skills necessary for his/her role? If not, what are the limitations?

Does the employee have a clear understanding of his/her work responsibilities? Has he or she been given a written job description, training, etc.?

What has been documented to date regarding the employee's work performance? What needs to be documented on a go-forward basis?

What policies/procedures apply to this problem? (These may be operational or HR policies.)

Based on company policy, what should be my next step? Should I contact HR?

Is the employee aware of company policies/procedures as they relate to his/her job performance?

How does the employee's performance or behavior need to improve?

What are time expectations for improvement and how will I monitor this?

## **II. Stating the Need for Improved Performance**

Describe the work performance/behavior problem and its impact in two to three sentences.

State the needed change in work performance/behavior.

Identify the company policy (if applicable) that addresses the performance problem/behavior.

## **III. Employee Perception/Feedback**

What do you believe the employee will identify as the cause of the problem? Is additional training necessary?

How do you expect the employee to react to the need for improved performance?

How do you plan on responding in order to remain focused on the employee's job performance?

Ask the employee to identify how he/she can improve his/her work performance.

Has your perception of the problem or strategies to resolve the problem changed? If so, how?

What company resources are available to support you and the employee?

#### **IV. Next Steps**

Identify steps you will take to address the problem. This might include actions required by policy/procedures, a follow-up meeting to review performance or an informal referral to the EAP.

Set up a follow-up meeting date.

Document the discussion and follow-up plans.

## COACHING & CONSTRUCTIVE CONFRONTATION

Coaching involves meeting with the employee to discuss what is expected of him or her, and to point out how observed performance is failing to match these expectations. This discussion should take place at the earliest possible stage and needs to continue until the problem is resolved.

Some goals of the coaching process are:

- To identify for the employee the performance concerns in clear terms
- To discuss the specific behavior problems that you have identified
- To identify obstacles to improvement
- To establish objectives and time frames for improvement

### Guidelines for Conducting a Coaching Session

- Prepare your information and discussion outline in advance, using the worksheet as an example.
- Conduct the session in a confidential setting and in a constructive manner.
- Clear your calendar and provide plenty of time for the discussion.
- Focus the discussion on specific job performance difficulties.
- Detail for the employee his or her job responsibilities and where performance has been failing.
- Highlight what the employee does well.
- Avoid trying to diagnose a personal problem – stick to the job performance issues.
- Ask the employee for his or her feedback.
- Set up a plan for improvement. Outline what you expect and set firm time limits. Be very clear about what the employee can expect if he / she fails to improve performance according to the mutually agreed upon plan.
- Document your discussion with the employee and the agreed upon plan.

### Constructive Confrontation

Once you have identified problematic performance, it is critical to confront it in a timely fashion.

## COACHING & CONSTRUCTIVE CONFRONTATION - continued

The goals of constructive confrontation are to address the behavior, not the person, and to encourage change in behavior. The constructive confrontation process works. The keys to success are planning, early intervention and follow through.

### There are four elements of constructive confrontation.

#### 1. Non-judgmental statements of fact

- Accurately describe the specific behavior.
- Do so based on only your own observations - what you have seen and heard.
- Focus on the behavior, not the person.
- Be objective.
- Make no judgements.
- Do not begin with a question.

For example: "What's wrong with you?"

"Do you have some kind of problem?"

- Do not make inferences or assume motives about what caused the behavior.

For example: "You deliberately cut me off!"

"Is something else in your life causing this?"

"You must be drinking too much lately."

#### 2. Statements of effect

- Clearly state the impact of the given facts.
- Identify how the behavior did not meet expectations or standards.
- Identify how the behavior caused other problems.

#### 3. Expectations about desired change

- Tell what you want to see happen.
- Describe the specific changes in behavior that will remedy the situation.
- Give specific time frames.
- Describe the consequences of not meeting the expectations when appropriate.
- Identify that the use and support of the EAP may also be helpful.

Using *The Sometimes Speech* can be extremely helpful when recommending the EAP. The following speech is a script that can be used when recommending the EAP program to employees.

**“The Sometimes Speech”**

**“Sometimes job problems like these are the result of things going on outside of the workplace. It may not be true in your case, and it’s really none of my business. However, because it is true sometimes, the company does have an Employee Assistance Program. It is free and confidential. It has helped a lot of people. I encourage you to contact the EAP.”**

4. Awareness and Control of Feelings

- Be aware of your own feelings.
- Expect defensiveness.
- Focus on performance.
- Stay calm and relaxed.
- Be caring, but avoid getting personally involved.
- Watch your volume and tone of voice.
- Watch your body language.
- Avoid sarcasm.

## COMMON REACTIONS OF THE CONFRONTED EMPLOYEE

### Employee Reactions

1. Promises – “You have my word that I will improve.”
2. Shifting Responsibility – “Why have you singled me out? Mary’s attendance is worse than mine!”
3. Anger – “Why in the “#@%!” are you talking to me? I don’t have to put up with this “#@%!”
4. Silence – The employee just stares trying to make you uncomfortable.
5. Crying – The employee suddenly bursts into tears.
6. Friendship – “I thought you were my friend. What happened to our friendship?”
7. Accusation – “Are you saying I have a problem? What is it?”
8. Alliance – “O.K., O.K.. Let me tell you what is going on at home. Then you’ll see, you’re lucky to have me here at all.”

### Possible Manager Responses

1. “I believe you, but you have made that promise before. Something is keeping you from making your promise good. You need to use every resource available to deal with that *something* and return to the good work you have always done in the past.”
2. “We are here to talk about *your* performance. *Your* performance is the issue we need to discuss.”
3. “We need to discuss your performance. If you are unable to discuss it calmly, it will be better for you if I document this, and we try again tomorrow.”
4. After reviewing the problem, ask for an explanation then wait - as long as it takes.
5. “Take a minute to pull yourself together, and then we need to discuss your performance.” (If it happens again, do not stop – continue.)
6. “I am your friend, but I wouldn’t be much of a friend if I just let you ruin your job without saying something.”
7. “Yes, you have a problem. You are not performing like you have in the past.”
8. “I’ll be glad to listen, but I am not a professional. I recommend that you talk to a professional through our EAP.”



## BARRIERS TO REFERRING THE TROUBLED EMPLOYEE TO THE EMPLOYEE ASSISTANCE PROGRAM

Sometimes our feelings and attitudes prevent us from taking the steps necessary to obtain appropriate help for troubled employees. As a result, we end up “enabling” the employee to continue his/her destructive behavior pattern until he/she is terminated. With the enabling process, everybody ends up a loser.

### **Some common barriers to referral:**

**Anger** – Are you angry with the employee because of his/her attendance record, deteriorating job performance or strange behavior? Do you want to “get” him/her?

**Sympathy** – Do you feel so sorry for him/her that you are tolerating poor attendance, deteriorating job performance, or bizarre behavior? Are you buying all the excuses?

**Fear** – Are you afraid that you are losing control of the situation, of yourself in the situation, of criticism from the employee, management or the Employee Assistance Program, of breaking confidence, or that you will jeopardize the employee’s job security? Are you afraid your actions may cause their situation to worsen?

**Guilt** – Do you feel guilty about how you handled the situation before, of losing your temper, or for not being able to be correct in the situation?

**Denial** – Are you denying that there is a job performance problem? Are you excusing him/her? “Best employee, when they’re here”, “Gets work done, just under the weather, now”.

**Ego-Involvement** – Is he/she molded in your own image and likeness? Is he/she your star employee? Is his/her failure your failure?

Whatever the reason for your reluctance, as a manager you are obligated to recognize it as an obstacle to a productive work team and a potential risk to your organization. By referring an employee to the EAP, you are taking responsibility for your staff and supporting them in resolving concerns that are affecting their productivity and overall well-being.

## THE EAP IS THERE FOR YOU AND YOUR EMPLOYEES

Employee Assistance Programs (EAPs) offer confidential services to help employees and supervisors. A simple phone call can start you or an employee on the road to getting help.

### **Who will your employee talk to?**

EAP representatives are specially trained individuals who listen to concerns without judging or criticizing. They are familiar with a wide range of community- and employer-sponsored resources that can help you or an employee improve the quality of life.

### **Typical EAP services include:**

- referrals to child-care programs and providers
- information on adoption
- books, tapes and other resources on parenting
- referrals to elder-care services, such as adult day programs, meals-on-wheels programs, skilled nursing and other in-home help services
- resources on relationships and communication skills
- referrals to personal counselors
- information about drug- and substance-abuse programs
- stress-management information
- referrals to legal and conflict-resolution services
- crisis-management services
- information about other community resources

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## RECOGNIZING AND ADDRESSING DEPRESSION IN THE WORKPLACE

Depression is a serious mental health illness that affects about 1 in 10 Americans. It is marked by nonstop feelings of sadness, hopelessness and worthlessness. If untreated, it may last for months or years and become worse.

The good news is that depression is treatable. Knowing the signs and understanding your role as a manager are first steps in helping a depressed member of your team.

### Signs

Signs include:

- nonstop feelings of sadness
- crying frequently
- loss of interest or pleasure in previously enjoyed activities (such as sports or family get-togethers)
- problems with focus, thinking, memory or decision making
- change in appetite
- trouble sleeping or sleeping too much
- loss of energy
- feeling hopeless, helpless or worthless
- irritability
- body aches and pains
- digestion problems
- thoughts of killing oneself or attempts to kill oneself
- overuse of alcohol or drugs

### Impact at the workplace

People with depression may show some of these signs at work:

- showing up late and/or not at all
- uncharacteristic mistakes
- problems learning new tasks or following through with work
- decreased productivity
- lack of initiative
- poor relationships with co-workers or customers
- new onset of irritability
- accidents and/or injuries
- complaints from other workers
- erratic work performance

## Talking with someone who may need help

Often a depressed person will not get help or tell a manager about her problem because of concerns about privacy and concerns about the impact on her job. But if one of your workers shares that he is depressed, consider taking these actions:

- Talk in a private location without interruptions.
- Give him time to tell you what's on his mind.
- Don't judge or diagnose.
- If he has not been clear, ask him what he wants you to do. He may only want your support. But don't make promises you can't keep. If you can grant his request, be flexible.
- Urge him to get help from an employee assistance professional or health care professional. Don't give him advice about the disease.
- If he mentions that he has thoughts of killing himself, take immediate action. Call your employee assistance program (EAP) or call 911 to get help about how to handle the situation.

If one of your team members exhibits a pattern of poor performance over a period of time, whether caused by depression or some other personal reason, you must deal with the problem. Here are tips to keep in mind:

- Check with the EAP before meeting with the employee. This gives you the chance to plan what you will say to the employee and talk through different scenarios.
- Meet with the person in a private location free of interruptions.
- Focus on the performance concerns only. If he shares personal problems, send him to the EAP for free, private and professional services. If he does not tell of any personal reasons that have caused the performance problems, still suggest the EAP. Tell him that the EAP has helped many people who had performance problems due to personal troubles.
- Keep watching performance. Get help from your human resources department regarding performance plans or discipline, and keep getting help from the EAP if necessary.

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# HELPFUL TIPS FOR MANAGER'S

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## DEALING WITH DIFFICULT PEOPLE

Learning how to deal with different personality styles can be a real asset.

If you consider someone “difficult,” your first step may be to try to understand what it is about that person that bothers you. Then you can deal with that specific trait or behavior in responding to him.

### **Types of difficult people**

You may find some people difficult, for instance, because they seem to know everything and they are reluctant to take advice or suggestions from anyone else. These people may come across to you as self-centered, arrogant and snobbish. An important thing to remember about most people like this is that underneath their self-confident exterior, they are often insecure. They may fear being exposed as the unsure people they are.

The best way to deal with someone with this personality trait is to try to understand, rather than possibly embarrass the person. If you have suggestions, always make them privately. Avoid public confrontations or power struggles if at all possible.

Another type of person you may find difficult is someone who tends to be very critical of others and who often feels taken advantage of. These people tend not to trust others, often accusing them of things that may not in fact be true.

In dealing with these people, the most important point is to try to establish some trust. Also, try not to get into lengthy debates with them. Instead, thoroughly explain the facts as you see them so that you will not be accused of holding anything back. Be as open and honest as possible.

People who nit-pick are another type that you may find frustrating. Nothing ever appears to be good enough, and they often criticize others for not working hard enough. Things must be just so. These people are often late, sometimes procrastinate and don't seem to move on from a particular topic. Often they are impeccably neat and require neatness of everyone around them.

A first step is to gently remind these people that their expectations may be somewhat unreasonable. It may also be useful to set constructive limits, showing them that even if they make such demands of themselves, they cannot impose them on you. Helping them to see that you are trying your best and that your actions are not subject to their control is sometimes effective.

Another type of person that might annoy you—not to mention drain you emotionally—is someone who makes waves by being consistently hysterical. For this person, everything is a disaster. Projects are doomed to fail. These people tend to exaggerate the importance of things, and they often appear to be surrounded by confusion and chaos.

The best way to handle people like this is to try to remain calm. State the facts in a gentle way. Avoid getting pulled into their anxiety and drama. The more you can stay based in reality, the less they can blow things out of proportion.

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## HOW TO MANAGE CONFLICT

Ask yourself the following questions about the conflict you are dealing with or trying to manage:

- What are the motives of the conflicting parties?
- What are the specific areas of disagreement?
- What are the areas of agreement?
- What mutual interests are at stake?
- How has either party solved conflict in the past?
- Who is the leader of each party, and what personal stakes do they have in the conflict?
- If the conflict were solved overnight by magic, what would it look like?
- What would be some concrete evidence that the conflict is increasing or decreasing?

If you can answer some of these questions as they apply to your situation, you may be able to better grasp the roots of the problem and its potential solutions.

### **Consider recruiting an expert to negotiate**

Negotiation is one way to manage conflict. A professional could ease communication and speed resolution of a conflict. Some professional negotiators are lawyers who practice mediation and negotiation as a way to avoid legal proceedings when possible. Other negotiators are professionals in the psychology field (social workers, psychologists or psychiatrists) who can be very helpful in managing personal conflicts. At an organizational level, there are conflict management specialists who work as consultants. Consultants with specific training in conflict resolution and change management often can guide an organization through major changes.



### **Relax to allow solutions to emerge**

If it is up to you to solve a conflict and the above resources are not available, sometimes the best thing to do is to let your mind relax and allow solutions to come to you while you do other things. Be receptive to creative energies that you may not be able to access if you are stressed and intensely focused on the problem. Perhaps a game of tennis or a yoga or art class will help solutions emerge naturally in your mind. It is a fact that we are more creative when we are relaxed, and at times thinking creatively is the only way to quell a conflict. Meditate, listen to music, talk to a friend, go out dancing. Try to see the conflict from a new angle.



## Try coping strategies

When conflict is apparent and there is nothing to do but cope, you can use coping strategies to help manage your emotions and thoughts. For instance, perhaps your brother and your father are having major conflicts with each other, and you must have talk with both of them every day. The conflict may have nothing to do with you, so in this case your No. 1 task may be to manage your own reactions to the conflict that surrounds you. Learning some relaxation techniques can be helpful in such a situation. Anger-control techniques also may help if you feel that the conflict is arousing your own anger.

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## MANAGING PRIORITIES AT WORK

Clarifying your priorities will help you organize each day more efficiently. Your work priorities should include any ongoing or upcoming projects as well as business trips, meetings of professional associations, and the obligations of work-related boards or organizations.

Get out a calendar and make a “to do” list for the next few months. Now that you know what you’ve got to get done, try to establish weekly priorities. Here are some tips for deciding what’s most important:

### **Deadlines**

Anything with a deadline will become a top priority as the date approaches, so make sure you’ve got a large calendar with all deadlines and obligations marked. If your schedule is unrealistically busy, you can call for help in advance rather than waiting for the situation to become a crisis.

### **Ask your boss**

You may be working on several projects for different people. Don’t avoid prioritizing because you don’t know which is considered most important. Find out! Your supervisor may need to redistribute work, change deadlines or talk to clients. If you’re already swamped and get assigned yet another “urgent” project, ask whether it takes priority over your other work. Talk to your boss about your workload and ask for help in assessing your priorities.

### **Urgent!**

Ask for clarification when colleagues use adjectives such as “important,” “urgent” or “critical.” If possible, request a deadline so you have a clear idea of the assignment’s time frame. Make sure you know just how “urgent” the assignment is.

### **Change your list**

Your priorities shift constantly, so don’t consider any list permanent. As deadlines loom or unexpected projects arise, you’ll find flexibility invaluable. By establishing work priorities—and asking for help when you don’t know what they are—you’ll lower your stress level and improve your job performance.

## Remember yourself

Make sure to include a yearly vacation as a “work priority.” Reserve time for yourself and your family. When you come back to the office, you’ll have more energy and even better ideas.

Managing priorities may not be easy, but it’s often essential. Try keeping a list at your desk. Does time spent at the office reflect the priorities you’ve established? All tasks are not created equal, so make sure you know which are the most important.

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## TAKE A HEALTHY STRESS BREAK AT WORK

Taking a short break several times a day can help keep you focused, energized and productive.

Your breaks can last just a few seconds or several minutes, depending on the circumstances. If you feel particularly stressed, you might want to take a few minutes to regroup.



### For a quick pick-up

If you just need to catch your breath, a few seconds' pause could do the trick. To avoid burnout, make sure you take time to recharge when you need it.

For a quick pick-up, take several seconds to change position. Close your eyes and breathe deeply. Try thinking about something funny or an activity you enjoy. Repeat this pause at strategic times throughout the day.

### A longer break

Taking a few longer breaks of up to about 5 minutes can help overcome mid-morning and mid-afternoon lulls. Use these tips to make the most of your break time:

- **Close your eyes and relax.** If you have an office, shut the door and daydream for a couple minutes. If you sit in a cubicle or other work space, turn your chair toward a quiet area.
- **Meditate.** If you don't know how to get started, many Web sites and books can offer guidance. Or, try 5 minutes of deep relaxation. Concentrate on breathing deeply and rhythmically to release tension.
- **Talk to a friend.** Of course, don't interrupt a co-worker who's busy. And remember to keep breaks to a reasonable length. But it is important to develop supportive relationships at work. A good support system can help diffuse stress and boost morale.
- **Take snack breaks.** Keep healthy snacks such as pretzels or dried fruit on hand to provide extra energy. And stay hydrated. Drink water instead of cola or coffee.
- **Massage your pressure points.** For example, press the pressure points near your jaw joints in front of your ears.

## **Check your work environment**

Keep the “big picture” in mind as well. What changes can you make in your work environment that could help lower your stress level? Try personalizing your space. A few photographs or colorful posters could brighten your office and make it a place you feel comfortable taking a short break. Also, try arranging your work area so you have to get up and walk to reach your file cabinet or bookshelf. This will help keep you active throughout the day and provide a built-in time for you to pause for a few seconds.

## **Watch your posture**

Posture can play an important role in keeping your stress level under control as well. Sit up straight—don't slouch! If you catch yourself hunching toward your computer or telephone, take a second to straighten up. If necessary, consider asking for a different chair.

Finally, try to identify your sources of stress at work. Make a list and evaluate each item. Can you eliminate or work around some of those stressors? It could help keep you healthy!

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## AVOIDING BURNOUT: GETTING THE INFORMATION YOU NEED

Here are some suggestions for avoiding burnout by getting the information you need and keeping an even keel:

- **Go straight to the source.** In today's increasingly team-oriented corporate culture, it may be OK to approach the source of information directly. Explain your situation calmly and listen to the other person's response. Perhaps there's a creative solution you can find together.
- **Consult your supervisor,** if you can't resolve this yourself. After identifying the person or department that has the information you need, go to your immediate supervisor and discuss—in a positive, constructive way—your situation. Recap the project you're working on, describe what's at stake and recount the steps you've taken to get the information you need. Also convey what you are feeling and experiencing.
- **Look inside.** Realize that burnout is not always the result of overworking; it is the product of frustration over circumstances. Reassess and take account. Could you have headed this kind of crisis off with better planning? Do you need time-management training? Are you a type A person who insists on handling everything yourself?
- **Cultivate your news sources.** Socialize with colleagues and discuss experiences and ideas. You'll gain information and insight into the company and the industry that could be helpful to you in your job.
- **Choose your battles, weapons and strategies carefully.** Keep in mind a Quaker saying: "In the face of strong winds, let me be a blade of grass. In the face of strong walls, let me be a gale of wind."



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## HELP YOUR EMPLOYEES COPE WITH CHANGE



Here are 4 ways to help employees adapt to change and stay motivated:

- **Stay accessible.** Whenever there is a change in the workplace, employee anxiety can run high. Make sure employees know that your door is open. Their constant questions can disrupt your work schedule, so you may need to come in a little earlier or stay later to concentrate on your own tasks..
- **Explain the basis for change.** Once employees understand the reasons for change, they feel less threatened. The needs of employees will vary with the type of change. Some change may just be procedural and require little more than a brief explanation. Major events such as mergers and reorganizations will take more time.
- **Don't undermine top management change by being critical.** Be as forthright as possible. Avoid conveying a negative attitude. Even if you think senior management didn't handle the situation in the right way, don't put your career at risk or undermine any change by criticizing it.
- **Show results.** Point out the positive results after a change takes place. This makes it easier to convince employees to accept other changes in the future. Refer to a successful change if you meet resistance when introducing something new.

### Re-energizing your team after downsizing

Has your group recently gone through a round of layoffs? Is everyone looking over their shoulders and wondering if they're next? How can you keep your employees motivated and focused on the job? Try these 6 steps:

1. Communicate all information to all employees all the time.
2. Gather employees from different levels and areas for a brown-bag lunch. Ask what they would change in the organization and how they'd change it.
3. Encourage employees to improve one process, procedure or aspect of their job, every day.
4. Give employees permission to say "yes" to customers and the resources to do so.
5. Break down barriers between departments.
6. Encourage employees to set aside time every day to focus uninterrupted on their highest priority tasks.

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## THE SUPERVISOR'S ROLE IN WORK/LIFE BALANCE

Today's employees typically balance multiple work and family roles, which may include employee, caregiver to children, caregiver to aging parents and spouse/partner. These different roles place a variety of demands on employees, and the demands often conflict with each other. The conflict between work and family roles has been shown to reduce life satisfaction and job satisfaction and increase job distress, absenteeism, thoughts of leaving the job and depression.

Clearly, organizations want to prevent these kinds of outcomes as they seek to retain quality employees. In fact, many organizations have responded to these issues by implementing a variety of "family-friendly" programs or policies, such as child-care and elder-care services, flexible scheduling, telecommuting and parental leave.

### **Supervisors as "gatekeepers"**

Even if your organization does not have formal work/family policies, you have the power to create a "family-friendly" work environment for your employees, which can benefit employees and the entire organization. Research has shown that people dealing with multiple work and family demands who have a supportive supervisor enjoy the following attributes:

- higher job satisfaction
- higher commitment and loyalty to the organization
- lower levels of burnout and less conflict between work and family roles

### **How to be a supportive supervisor**

*Be flexible.*

Flexibility can be "day to day" and "informal" and thus not require a formal flextime policy. Employees who are dealing with multiple work and family demands may face planned and unplanned family circumstances, so flexibility can be invaluable to them. To provide the flexibility employees need, you might:

- Offer some degree of schedule flexibility to accommodate employee needs.
- Allow employees to leave work early or come in late on occasion.
- Allow for occasional days off to deal with family emergencies.
- Allow employees to take important phone calls about family issues at work or get them phone messages as quickly as possible.
- If feasible, allow employees to work at home from time to time.



*Be sensitive to employees' family responsibilities.*

You can display sensitivity by taking specific actions or by having a generally positive attitude toward family issues or concerns within your work group:

- Communicate with your employees about their work and family situations.
- Regularly ask employees about their families and any special circumstances that they are facing.
- Offer emotional support. For example, extend empathy or sympathy to subordinates who are dealing with difficult emotional issues.
- Share stories or advice based on your own caregiving experiences.
- Allow employees time to talk with other employees who are facing similar situations.

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## STOP WORKPLACE BULLYING

Workplace bullying is persistent unwanted behavior that creates a toxic work environment. Bullying is blatant or subtle: nitpicking, direct or veiled threats, screaming, name-calling, humiliation, sabotage and ostracism.

Bullying:

- drags down morale
- increases tensions
- reduces productivity
- promotes turnover and absenteeism
- puts organizations at risk for damaging media coverage and costly workers' compensation claims and litigation

Workplace bullies can be anyone from cashiers to CEOs. They are poor performers or high achievers, male or female, hourly workers or managers. What they have in common is their systematic attempt to undercut others' abilities to succeed. This is generally due to poor self-esteem and a lack of self-confidence. Bullies try to build themselves up by tearing others down.

### **Bullying and the law**

Bullying is different from discrimination. It is not restricted to harassment directed at legally protected individuals based upon race, gender, disability, etc. It is non-status-based abuse. There is no specific legal protection for targeted employees.

However, health and safety laws requires that employers take every reasonable precaution to protect employees and provide healthy and safe workplaces. All organizations must take bullying seriously and become proficient at handling it.

Managers should take steps to effectively address this problematic issue.

## **Be proactive**

Make civility part of your corporate culture from the top down. Cultivate respect and open communication between all employees. Be a positive role model by dealing with conflicts professionally and with sensitivity.

Educate your employees about company harassment and anti-violence policies. Clearly communicate that professional conduct is a non-negotiable condition of employment for all employees.

## **Identify bullying**

Bullying is not always readily apparent. It is easy to identify a bully if you witness or receive complaints of verbal abuse or tantrums. However, some bullies are often savvy enough not to reveal themselves to their superiors. So, watch for subtle signs of a problem—the person who takes credit for others' work, or who uses sarcasm or interruptions to dominate meetings.

Body language can also point to bullying. Notice if an employee always rolls his eyes and smirks when others are talking.

## **Take action**

Take all complaints seriously, handling them promptly and consistently. If you do not, targets will stop reporting bullying behavior, enabling more bullying to occur.

Point out unacceptable behavior to bullies immediately. If you witness someone behaving inappropriately, pull her aside and tell her the behavior will not be tolerated. Focus on the behavior, not the person. Do not ask the person to “change her attitude,” but rather, tell her that the behavior must stop or she will face consequences. Be clear and specific about what behavior is offensive. That may be all it takes to stop the bullying.

Before reprimanding an employee, check with your company's human resources staff for guidance about policies and procedures. Always document what was reported or witnessed and all investigative and counseling actions. Monitor the situation and take additional action consistent with company policy if a pattern of harassment emerges.

In addition to human resources, you can partner with your Employee Assistance Program (EAP) to help address workplace bullying. You may refer disruptive employees to the EAP for evaluation and counseling. The EAP can also assist employees targeted by bullying behavior.

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## COMMUNICATION TIPS FOR LEADERSHIP SUCCESS

Here are some basic elements of effective communication that all leaders should know and practice:

- **Be prepared.** Poor preparation is probably the “No. 1” pitfall in management communication. It’s not necessary to write speeches in advance, but it is crucial to nail down your main points and to be ready for questions. Create 2 lists. One tells the benefits of the idea that you’re trying to convey. The other lists the downside of not taking up the idea you’re trying to sell. This level of preparation is appropriate for all settings, from large group meetings to one-on-one conversations.
- **Watch for and ask for feedback.** To know if you’re connecting with your audience, check body language and ask questions. If your listeners are crossing their arms, looking down and not making eye contact with you, and if their feet are pointed away from you or toward the door, they’re casting a subtle but negative judgment on what you’re saying. When you get the chance to ask for feedback, always ask open-ended questions such as “Do you have input on this?” The key goal is to see if they really heard, and accepted, what you were saying.
- **Talk with people, not at them.** Managers frequently fall into the trap of treating communication as a one-way street, with the sole goal of conveying the manager’s agenda. Create a “relationship-based” style in which their agenda is heard as well.

Relationship-based communication also requires openness in both directions. Employees want to know as much as they can about what lies ahead for the organization (and for their jobs). Managers are not always free to share every detail about a company’s situation, but they should bear in mind that “I’m not getting the whole truth” is one of the employees’ chief complaints about management.

- **Treat communication as a top priority.** Managers increasingly have to find time to do their managerial tasks—such as supervising and motivating—while also doing jobs similar to that of their subordinates. This “working manager” phenomenon has probably grown with the recession, she says.

But no matter how hard you are working, don’t skimp on communicating, because it’s as essential as any other part of your job. More peer-to-peer interaction can make you a better manager, if only by giving you more valuable information to pass along to your employees. When one team hands its project over to another, workers on the receiving team can get a head start if the team leaders have already been in close touch. And managers can improve their own performance by sharing notes on management issues.

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## HAVING CRUCIAL CONVERSATIONS WITH EMPLOYEES

Once a performance problem surfaces, planning to hold a conversation with the employee is the first step. Examine your contribution to the problem. Have you avoided addressing the problem or exacerbated it through contradictory statements? Review the facts. Identify your emotions; then set them aside. Self-examination sets a constructive tone.

Review performance standards, identify problematic behaviors and the consequences of not changing in objective terms (“Fix your attitude!” will not suffice), review documentation and action previously taken, and plan your crucial conversation. Identify potential solutions and anticipate roadblocks. Write a script and practice it. Consult with your human resources department, if necessary.

A recurring theme in successful performance problem resolution is taking action promptly. Commit to act by identifying the appropriate time and private location for the crucial conversation.

### Crucial conversation checklist

- Clearly state the issue(s).
- Provide specific examples of problem behaviors.
- Describe expectations for change.
- Clarify consequences for not changing.
- Express confidence in the employee.
- Identify your contribution to the problem and solution.
- Invite the employee to identify solutions.
- Outline your respective responsibilities.
- Set times to review progress.
- End on a positive note.

### Example conversation

Melissa supervises a highly productive team. She hired a new programmer, Randy, who was initially welcomed by the team. After several weeks, she started receiving complaints from team members about Randy—that he is argumentative in meetings and makes derogatory comments about co-workers. She takes time to prepare before meeting with Randy.

*Melissa:* Thank you for meeting with me, Randy. I want to talk with you about our team’s working environment. Our goal is to create a positive, productive environment so people on our team feel comfortable sharing their ideas, help one another out, and take pride in their work. I recently learned that you have missed meetings, have not let people finish expressing their ideas by interrupting and

talking over them, and have been heard making comments about how much more talented you are than anyone else on the team. I am very concerned about the impact some of these actions are having on the team. We have developed a highly productive team over the years and I am not prepared to lose that quality. I have contributed to this problem by not closely monitoring your transition onto the team and not presenting clearer expectations of your important role on this team. I want you to succeed and become a valuable team member. The behaviors I described a few moments ago must change; we need to figure out how that will happen. Help me understand what is happening from your perspective.

*Randy (angrily):* If people were upset with me, they should have come to me!

*Melissa (anticipating roadblocks):* We're here to talk about the impact your behavior is having on the team. How do you see things?

*During their conversation, Randy admits that he feels intimidated by the team's level of talent and experience. He feels pressure to meet his own high expectations and is worried about not measuring up.*

*Melissa:* I appreciate your honesty. Your disrespectful behavior cannot continue. Your future employment here is contingent upon you taking responsibility to change. What are your ideas?

*Randy:* You are right. I want to make this job work for me. I will talk with the team this afternoon, apologize, and ask if we can repair our relationships. I will attend all meetings, be respectful—and not put so much pressure on myself!

*Melissa:* Good. I believe you are headed in the right direction. Let's meet next week to talk about how things are going. I will make time in my schedule to attend the team meetings. I would also like to give you information about our employee assistance program—this may be a perfect resource for you during this challenging time. Let me know how else I can help, OK?

*Randy:* Sure, thanks for giving me another opportunity.

Remember: The key to successful outcomes is treating employees with respect and firmness.

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## WORKPLACE HAPPINESS: WHAT MANAGERS CAN DO TO SET A POSITIVE TONE

All employees have a role to play in fostering workplace happiness. But managers have a special role because of their power and visibility. They can influence workplace emotions through:

- their system of rewards
- the norms they set for workplace behavior
- their own example
- how they communicate, especially if the news is bad

Here are some ideas from management experts on how to set a positive workplace tone.

### **Start with a smile**

Smiles and cheerful greetings really do foster happiness. Not only do you make others feel better, but you brighten your own mood in the process.

Cheerful managers can have an especially wide positive impact because they tend to be watched closely by the workers who report to them. Consciously or not, managers are always setting an example.

### **Set positive norms**

Good and bad emotions can spread like a virus within a group. So managers should be ready to clamp down on behavior that sparks negative emotions, even if it seems trivial at the time.

### **Practice the economics of happiness**

Smart managers know that two rewards of the same dollar value can have different emotional impacts. They also know that there's a good way to tell bad news. Employees are usually happier to get a bonus than a raise, for instance. Unpredictable gains are better than stable gains, while stable losses are better than unpredictable losses.

Separate good news and combine the bad. If you have two items of good news to announce and two items of bad news, you will get more positive punch out of the good news by spacing it out in two separate announcements. With the bad news, it's best to unload it all at once.

## **Offer honesty and optimism**

And yes, there is bad news—sometimes plenty of it. Managers can only soften the blow so much by timing the announcements right. Employees want and deserve honesty. But honesty does not preclude optimism. People appreciate a positive attitude in the face of adversity, as long as the attitude is genuine.

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