



BECOMING AN INDISPENSIBLE PARTNER TO YOUR CLIENT ORGANIZATIONS

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INTRODUCTION

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LEARNING OBJECTIVES

- Learn about expanded definitions of partnership between your EAP, your client organization, and their other vendors
- Hear about successful case studies for expanding your partnership with your client organizations
- Be inspired to find new ways to enhance your EAPs value proposition and greater engagement by employees and their families



WHY IS THIS IMPORTANT?

- Generates customer intimacy
- Increases utilization
- Find ways to add value



HOW DO YOU DO IT?

- Start where the client is....."
- Listen to their needs
- Stay "top of mind"



EXAMPLES OF KEPRO CUSTOMER PARTNERSHIPS

- Health conditions (Diabetes, Cancer)
- Customizing a teambuilding training to address collegial communication-align with "Don't be a Jerk" Culture
- Corporate mental health initiatives (THRIVE)
- Communication challenges in a department
- Cross-referral with insurance companies-train operations staff-theirs and yours about each other's services

How can you wrap your services around the customer's other benefit programs so you remain part of their whole package?



CASE EXAMPLE #1: CANCER HUDDLE

- Virtual roundtable of vendors who review approximately three cases twice a month for an hour
- Participants include cross functional group of vendors and professionals
- RN from insurance plan selects medically complicated cases and “presents” to the vendor team
- Vendors (including a medical doctor) ask and answer nurse’s questions and make comments related to their specialty
- KEPRO provides the only psychosocial input to the primarily medical team



CASE EXAMPLE #1: CANCER HUDDLE

MIKE, AGE 52, NORTH CAROLINA

- Stage IV Pancreatic Cancer
- Metastasis to Liver
- Type 2 Diabetes
- Anemic
- Gastrojejunostomy (“G-J Tube”)
- Radiation treatments to spine for pain management



CASE EXAMPLE #2: TEAMBUILDING TRAINING

SAMPLE POPULATION

400 employees who work over three shifts with varied experience and educational backgrounds, large international company

WHY WAS IT REQUESTED?

Annual Employee Engagement Survey revealed need to understand strengths and weaknesses, have difficult conversations, confront corrosive behavior

WHAT DID YOU DO TO DETERMINE BEST WAY TO PROVIDE TRAINING?

On-site counselor/trainer met with manager over several months then piloted it on the managers



CASE EXAMPLE #2: TEAMBUILDING



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CASE EXAMPLE #2: TEAMBUILDING TRAINING

HOW DID YOU EVALUATE IT?

Post-session evaluation

HOW DID YOU TWEAK IT AFTER MANAGER TRIAL RUN?

Encouraged employee engagement via individual, small and large group exercises, hands-on activities, took as many questions as possible

LESSONS LEARNED FOR THE TRAINER

- Groups enjoyed peer interaction/activities
- You can't please everyone-always someone who didn't want to be there/gave negative feedback
- Hard to find material that all could relate to



CASE EXAMPLE #2: TEAMBUILDING TRAINING

LESSONS LEARNED FOR THE CUSTOMER

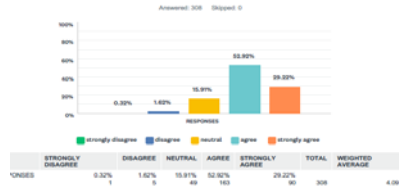
- Employees need basic communication tools to engage in straight talk/confront corrosive behavior
- Three Step Perception Checking process beneficial
- Employees felt heard
- Participants recommended the workshop be presented annually

Head of department was impressed with survey results/audience satisfaction-
 "Quality people aren't known for giving 5s"



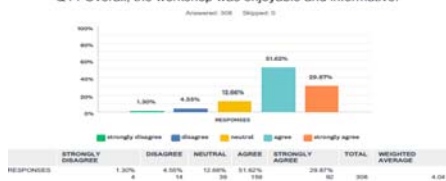
CASE EXAMPLE #2: TEAMBUILDING TRAINING RESULTS

Q4 The workshop offered techniques and tools that will help me communicate more effectively in the workplace:



CASE EXAMPLE #2: TEAMBUILDING TRAINING RESULTS

Q14 Overall, the workshop was enjoyable and informative:



WHAT COULD YOU DO? BRAINSTORM EXERCISE

Given what we talked about can you think of an opportunity to partner with your customer in a non-traditional way?

EXAMPLES:

- Wellness program
- Disease management
- Employee engagement



DIABETES FORUM

Meet monthly with combined vendor and customer team (on-site health coach, occupational health nurse manager) look at ways to help the organization with high claims costs related to Diabetes

Things we've considered

- Food in their cafeteria (teaching healthy alternatives)
- Trial run of changes at one site initially
- Whose buying the food that they eat
- How to promote (home mailing if male workforce and women are doing shopping)
- What about their children's health



THRIVE INITIATIVE

- Large employer partnered with New York City Mayor's wife to make mental health care more accessible by training New Yorkers in Psychological First Aid
- The customer provided the space and participants
- KEPRO provided an EAP Orientation in the middle of the eight hour training
- There was a LOT of interest from employees across the organization to learn about mental health

➤ It was a great way to spread the word about EAP services



CONCLUSION

To stay competitive in the EAP space we must become indispensable to our customers

“Start Where the Client Is”

look for ways to provide “out of the box” ideas to partner with your customers



REFERENCES

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