

PULL QUOTE FOR INSIDE: “If you want to hear a leader say, you ‘get us’ it will help to start thinking of your EAP as more than merely a free counseling service. Instead, learn the *business* of your customer organization and find critical contributions within that realm.”

## Act Like You Belong

### Develop Business Acumen for Greater Credibility

*By Jeffrey Harris*

The year was 2005, and I was sitting in a boardroom at the headquarters of a large financial services company in Los Angeles. Around the table were 35 “captains” of the business from the western U.S., including CEOs, bank presidents, senior VPs of sales – and *one* EAP consultant. How I managed to become a consultant to this group started as a very purposeful and patient yearlong campaign to learn the business of my customer.

Let me expand on that path, to illustrate the topic of building management consulting credibility through business acumen.

#### **The Homework Comes First**

I started my campaign by scouring the company intranet for information about the inner workings of the company. I studied organizational charts and phone rosters; dug through archived employee newsletters and annual reports; read and re-read the “elevator speeches” provided to salespersons for winning new business. I consulted with my EAP peers in the company to collect their organizational knowledge.

In most every client intake, I made it a point to ask the employee about their job title, daily functions of their position, challenges of the work, and the reporting structure of the department. I began reframing problems into business issues or work impacts.

Soon, I could describe the difference between institutional asset management, fund analytics, brokerages, lock boxes and wealth management, to name a few. This knowledge could then be used to shape some suggested solutions within the management consultation opportunities that appeared. When you think about your own customer organization... where can *you* find information similar to this?

#### **Act Like You Belong**

Once I felt confident in a basic understanding of the business, I arranged for a meet-and-greet with the CEO or president of each unit, often through an HR contact or a manager for whom I had provided a helpful management consultation.

I used the meetings to ask the business leader for his/her vision for the unit, the key strategies for that business year, and the challenges the leader thought they might encounter. I made sure to talk like a businessperson rather than a therapist. Then I asked how the EAP, through our workshops and consulting, could help the workforce contribute towards those strategies. Often, the leader would ask me what the “pulse” of the workforce was, so I came prepared to talk about themes or trends, without sacrificing client confidentiality.

I followed up the interviews by sharing an article of interest, or placing an occasional call to check in. Later, this provided me with greater levels of access to the business leaders.

What steps can *you* take to move towards high levels of access? Consider using solid “EAP ambassadors” that *you* have cultivated to get *yourself* introduced to key leaders in the organization. Work on developing courage to mingle with company leaders, and conduct yourself

with professionalism, to help communicate that *you* are a trusted resource to the leadership of the company.

### **Think Like a Manager**

I have come to learn that any action or solution you suggest for a manager is likely to cost the company... in terms of money or time. I started demonstrating restraint and respect for this fact, which gained respect from the managers.

I sought to understand the cyclical or predictable periods of ramped-up production or deadlines. These cycles helped explain low turnout for brown-bag lectures and seasonal increases in utilization for employees seeking stress management. For instance, I never scheduled EAP events or meetings at the end of a reporting period, which is always an intense time for a financial services company.

### **You ‘Get Us’**

So just how *did* I get an invitation to join the quarterly leadership roundtable at this financial services company? A senior director hosted an annual springtime “university,” where employees attended workshops to learn about other business lines to increase their ability to cross-sell. I had attended many classes during my campaign to learn the business, and soon was offered the ability to present a class each year on the topics of productivity and performance in the human side of business.

In 2005, my workshop on behaviors, which support excellence, was better attended than most other topics at the event, largely because the topic related directly to the needs of the people working within the company. Soon after, this senior director called to say, “You ‘get us’” and offered the invitation to have a regular seat at the quarterly leadership meeting.

If you want to hear a leader say, you “get us” it will help to start thinking of your EAP as more than merely a free counseling service. Instead, learn the *business* of your customer organization and find critical contributions within that realm.

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