

EMPLOYEE ASSISTANCE REPORT

supporting EAP professionals

NEW!
EAP sales column
by Shelley Plemons!

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The Fully Leveraged EAP – Part I

By Jeffrey Christie & Michelle Spearing

Since their inception, employee assistance programs have been defined as workplace programs designed to assist: (1) work organizations in addressing productivity issues, and (2) “employee clients” in identifying and resolving personal concerns, including health, marital, family, financial, alcohol and other drug, legal, emotional, stress, or other personal issues that may affect job performance.

One concept that has permeated these definitions is that of describing the client organization whose employees receive the benefits of an EAP, as a singular entity. This two-part article strives to provide a different approach, one that emphasizes:

- ❖ Viewing the client organization not in the singular, but as a network of organizational functions, each with its own mission, goals, and objectives;
- ❖ Determining the ways that EAP can support each of these functions; and
- ❖ Delivering, communicating, and evaluating EA services based upon its ability to support each of the functions of the organization.

Of critical note, this concept should NOT be construed as intend-

ing to replace EAP’s role of assisting individuals. Rather, it is an *and* concept, not an *instead of* concept. As EA professionals have learned, the better an EAP can prove its value in assisting *organizational* goals, the more likely it is to be retained, and in turn serve *individual* employees and their families.

Operating Assumptions

Purchasers of employee assistance services eventually learn that they can expect more from an EAP than simply an alternative way of funding therapy. The purchaser can expect an EAP to:

- ❖ Assist in managing troubled employees, enhance the work environment, and improve job performance;
- ❖ Partner on the effective use of constructive confrontation and intervention skills to address employee problems that affect job performance;
- ❖ Provide confidential assessments for employees whose personal concerns affect (or potentially affect) job performance;
- ❖ Promote the availability of EA services to employees, their families, and to the work organization;

- ❖ Refer employees for diagnosis and treatment – and monitor and follow up on cases to ensure progress;
- ❖ Advise work organizations on effective mental health/substance abuse benefit plans that advance the goals of productivity and safety through access to evidence-based treatments;

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- ❖ Educate about advances in employee retention and risk management, e.g., cross-cultural adaptation services; and
- ❖ Apply research methods to evaluate the impact of EA services on the organization and its employees.

It is shortsighted to calculate the value of an EAP strictly in terms of its impact on an organization's health care costs. A more comprehensive view must include the assessment of the *combined* impacts of EA service on health care costs, productivity costs, and safety costs. It's of little solace to a business to save \$5,000 on an employee's mental health costs when consequently, he or she causes a \$5 million industrial accident.

EAP as Aligning with the Plurality of Organizational Functions

In most organizations, the following functions exist, each with its own mission statement and objectives. They are:

- Human Resources;
- Legal;
- Health, Safety & Environment;
- Corporate Security;
- Community Relations; and
- Operations.

In examining these functions, it is not difficult to recognize how a well-integrated EAP – or fully leveraged EAP – can assist in supporting each of these areas. Several of these functions will be examined this month; the remainder will be discussed in the conclusion of this two-part article.

◆ **Human Resources** – Many HR statements articulate such objectives as 1) attracting and retaining the right talent and 2) developing the knowledge, skills, and abilities of its workforce.

EAP Relevance – EAP, at its core, is a skill set that focuses on

the retention of valued employees, workers who at some point are experiencing personal crises that endanger job retention. EA professionals serve as workplace behavioral experts. The need for a constructive relationship between HR and the company's EAP is of vital importance.

\$ Benefit to Employer:

Retention; avoiding the cost of separation, recruitment, and retraining. Consider: Individuals in jeopardy of losing their jobs were referred to EAP and, through EAP intervention, were able to preserve their employment as measured 12 months later. This would constitute a successful instance of job retention. For a given industry, an average cost for termination, recruitment, selection, and retraining might conservatively be estimated at \$30,000. In one year, EAP was successful in retaining 95 formal supervisory referrals, which translates to a savings of just over \$2.8 million. Of course, the average cost will differ by industry.

◆ **Legal** – The mission statement of a corporate law department may state, in effect, to provide representation in a manner designed to ensure the organization's compliance with both external and internal law policies.

EAP Relevance – In their daily interactions with employees, supervisors, and managers, EA professionals often serve as the "first voice" in educating individuals about areas that, if handled incorrectly, may violate laws and lead to significant consequences. Although EA professionals do not represent themselves as attorneys, they can still be a valuable catalyst in connecting company representatives with critical legal consultation. For instance, a supervisor may be considering terminating an employee

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but, in so doing, inviting possible Americans with Disabilities Act (ADA) or Family and Medical Leave Act (FMLA) violations. Encouraging the inclusion of legal consultation can save on unnecessary losses and penalties later.

\$ Benefit to Employer: Risk management. Effectively addressing risk factors reduces liabilities created by management decision-making errors.

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◆ Health, Safety &

Environment – Many corporations' mission statements focus on protecting employees, communities, and the environment from harm.

EAP Relevance – EAP has clear and direct relevance to the goals of health and safety. Looking solely at the important area of maintaining a drug-free workplace, EAP can and should contribute its expertise in shaping substance abuse policy; managing employees who violate this policy; determining when employees should return to work and providing aftercare monitoring. However, in the broader context of fostering a psychologically fit workplace, an EAP can and should be utilized in analyzing and reducing the behavioral factors that lead to accidents, lost time, and injuries. This charge also includes assessing psychological fitness-for-duty, evaluating return-to-work factors after medical leaves for mental health or substance abuse, and serving as a critical part of a multi-disciplinary team.

§ Benefit to Employer:

Across-the-board reductions.

This would include reductions in the number of accidents, loss of life, loss of equipment, and reduced costs related to medical care and medical leave. ■

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Editor's Notebook

How well are corporate clients utilizing YOUR employee assistance program?

Obviously this is always a topic of interest among EA professionals. Jeff Christie and Michelle Spearing present what we think are some intriguing recommendations toward more fully leveraging your particular EAP, in part one of a two-part article. Watch for the conclusion next month.

Second, I am excited to announce the debut of a sales column by Shelley Plemons in this issue of *EAR*. Shelley has developed a dynamic "SALES" process that has been presented to several organizations throughout the U.S. and internationally. Shelley, founder of Strategic Sales Solutions and an EA sales professional who has written numerous articles on EAPs, wishes to share her sales expertise in this newsletter. Let us know what you think!

Shelley has also been a presenter at numerous World EAP conferences, which I mentioned last time that I am planning on attending (Oct. 26-29 in Denver). I am looking forward to networking with EA professionals to learn more about your concerns as well as to glean your suggestions for articles for both *EAR* and the *Journal of Employee Assistance*, in the coming year.

Speaking of feedback and story ideas, don't forget to check your inbox for an *EAR* reader survey that we recently distributed via email. It only takes a few minutes at your computer to complete it and email it back. However, your input goes a long way in helping us plan editorial content for *EAR* in 2012. We'd love to hear from you! Until next time.

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Resources

📖 ***Dancing With Digital Natives: Staying in Step With the Generation That's Transforming the Way Business Is Done*** by Michelle Manafy, www.barnesandnoble.com and www.infotoday.stores.yahoo.net. As an always-connected, socially networked generation increasingly dominates business and society, organizations ignore the implications of these "digital natives" at the risk of becoming irrelevant. Manafy offers practical advice geared to help managers, marketers, and co-workers maximize their interactions and create environments where everyone wins.

📖 ***How to Get a Job in 90 Days or Less***, by Joe Carroll, www.amazon.com. The nation's unemployment rate has hovered at nearly 10% since mid-2009, which means a large chunk of the workforce has faced the harsh reality of unemployment claims and uncertain job futures. Carroll's book offers concrete strategies for finding work.

📖 ***Gallery of Best Resumes***, by David Noble, JIST Publishing, www.jist.com. Job seekers aren't the only individuals who need to think about resumes. The author offers a wealth of information designed to benefit people of all ages and experience levels needing to modernize and strengthen their resume. ■

Technology Trends You Can't Ignore – Part I

By Daniel Burrus

Technology is evolving...fast. For that reason, it's imperative that you and your company clients are focusing not just on the changes that are happening today, but also on the technological trends that are emerging and shaping the future. Why? Because the more anticipatory you can be in regard to technology, the more creatively you can use it to gain a competitive advantage, and add value to your EAP.

As someone who has been accurately predicting the future of technology for over 25 years, I urge business leaders (and others) to focus on the following three trends that are emerging and reshaping the business landscape as we know it. We will focus on one of these trends in this article, and we will examine the other two trends next month.

Just-in-Time Training

Thanks to cloud-based technology, we're on the brink of a revolution in just-in-time training. This will enable people to use their laptops, cell phones, and tablet computers as a tool to receive training precisely when they need it. In the current training model used by many organizations, people receive training for a variety of things before they actually need the expertise, thus taking the people away from their jobs and costing the company a lot of money.

With just-in-time training, companies can keep people in the field without the specific training. Then, when the person needs a certain skill set to complete a job or do a task, he or she can receive the training for it in real time via cloud-based technology.

For example, suppose your company specializes in selling and

repairing commercial HVAC units. There are a number of different units your repair staff needs to know how to fix. But rather than taking your people out of work and putting them in a multi-day training course, you keep them in the field without the specific training. When they have to repair a unit they are not familiar with, they can receive the training on how to fix it in real time via their mobile device as they are servicing the unit.

Let's take this trend a step further. Suppose a commercial HVAC repairperson is on-site, servicing something he's never worked on before. He uses the just-in-time training module via his tablet computer. He's still confused about a certain aspect of the repair, but all he has to do is touch the "help" icon on his screen and it immediately connects him to a master trainer live on the screen.

However, instead of just telling the master trainer what the problem is, the repairperson can put on a headband with a camera, much like the headbands with a light on the front that people use for camping or

car repair. By wearing this digital, high-resolution camera that interfaces with the mobile device, the repairperson can show the master trainer exactly what the issue is. The master trainer can see what the repairperson sees and can tell him exactly what to do – just as if he were standing right there with the repairperson. Talk about a dramatic savings and increase in efficiency!

Realize that using cloud-based technology for just-in-time services goes way beyond repair. It could be used to train people on new software, product upgrades, instruct employees on new policies and procedures, etc. And it's different and better than a standard tutorial, because the training can be accessed via any device, anywhere, and at anytime...and it offers an option for live help. In reality, the applications for cloud-based, just-in-time services are virtually limitless. ■

Daniel Burrus is considered one of the world's leading technology forecasters and business strategists, and the founder and CEO of Burrus Research. For more information, visit www.burrus.com.

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Massive Cost Savings Hidden in Electronic Medical Records

The handwriting on a doctor's prescription isn't the only thing about the typical physician that's difficult to understand.

Several recent studies have shown that the vast majority of doctors in the U.S. have not adopted the standardized use of Electronic Health Records (EHR), and one expert believes it's one of the driving forces behind rising health care costs.

Preliminary estimates from the 2010 National Ambulatory Medical Care Survey (NAMCS), which is conducted by the U.S. Centers for Disease Control (CDC), showed that the percentage of physicians with EHRs that met the criteria of a basic EHR system by state ranged from 12.5% to 51.5%. However, after excluding 27 states with unreliable estimates, the percentage of physicians having fully functional systems that met the criteria ranged from only 9.7% to 27%.

"Tracking medical problems can prevent complications of chronic illnesses such as heart attacks, strokes

and can increase the overall quality of care," said Dr. Angel Garcia, CEO of EHR solutions provider Global Medical Consultants. "Moreover, the cost savings of having widespread adoption of EHR in the U.S. health care industry would reduce health-care costs by more than 30% per year – a savings of more than \$720 billion per year. That's actually more than enough savings to insure all 47 million Americans currently without health insurance."

What perplexes Garcia is new data just released, which suggests that nearly one-third of physicians own an iPad. According to a report by the *American Medical News* in April 2011, nearly 33% of all doctors indicate they own the new technology. Another report from the market research firm Knowledge Networks stated that 27% of primary care and specialty physicians own an iPad or similar device, five times the rate of the general population.

What's unclear, according to Dr. Garcia, is the role the technology

has in their practice.

"When you compare the power of tablet and cloud computing with a strong EHR adoption rate, the potential for savings and markedly increased quality of patient care could skyrocket," said Dr. Garcia, also author of *Do No Harm: Saving Our Health Care System* (www.DoNoHarmDrs.com). "The problem is that doctors aren't incorporating both these elements. Let's face it – some doctors are surfing the web and downloading movies and music on a device that could help save the industry that is in crisis. It's time for the health care industry to catch up to every other industry in the civilized world and adopt an electronic solution for not just record-keeping but more importantly for clinical tracking of medical problems that will make their patients safer and health care affordable." ■

Source: *News and Experts*
(www.newsandexperts.com).

In the News

'ADA' Resource Available

Many EA professionals receive questions about the *Americans with Disabilities Act (ADA)* – and in particular – the recently changed *ADA Amendments Act of 2008*, which went into effect in 2009.

In the *Amendments Act*, Congress fixed the definition of disability to cover more people and as a result, prevent more discrimination. This means the question of who has a disability is no longer the main focus. Instead, the focus is on whether discrimination occurred.

The Job Accommodation Network (JAN) created an online resource to bring employers, employees, and others up to speed on this legislation. For more information, visit www.jan.wvu.edu/bulletin/adaaa1.htm. ■

Tips on Changing Direction

By Gary Foreman

Have you ever changed your mind? It's something that we generally don't like to do. Even the phrase sounds negative, as it seems to emphasize that your prior decision wasn't a good one. But that's not really fair. Maybe a more accurate description would be that you changed *direction*. That's because we don't often discover new facts until after we've made a decision – information that should cause us to reevaluate the decision we've made.

But for many of us, this is difficult. We don't like to think that we might have made a mistake. In fact, in changing our minds we have to acknowledge the mistake and admit that there could be a better solution.

That is a problem for the majority of people. It causes us to stay with prior decisions well past the time that we should be brave enough to make a new, different decision. We tend to waste time and money on something that we know isn't working.

Reviewing Investment, Retirement Accounts

Let's examine some of the areas where it could be wise to reconsider some past decisions.

Do you review your investment and retirement accounts regularly? Not every investment performs the way you expected. Even the best financial analysts choose some clunkers. It's tempting to overlook them – just kind of skip over them when you look at your statement.

However, sticking with bad investments can cost time and money – even if they're not worth a lot of cash. Admitting the mistake allow you to free up time and money that could be used to choose *another investment* – one with more potential than what you currently have.



Reviewing Credit Card Balances

Some people assume that credit card balances are a fact of life. Maybe this has been true in the past. It could be that you've carried a balance ever since you were a teenager with your first credit card. So it only seems natural that you will always carry a balance. On the other hand, if that's the only reason for this belief, perhaps you need to consider some *additional information*.

Why not look at what you would need to do to pay off the balance? You can use this calculator to determine what it will take to pay it off at <http://www.bankrate.com/calculators/credit-cards/credit-card-payoff-calculator.aspx>. For an illustration add \$100 to the monthly payment and see what happens.

Don't forget to think about the interest that you won't have to pay if you eliminate the credit card balance. That's often a good motivator.

What Does Storage Cost?

Some folks tend to keep a lot of stuff around. People who live with clutter often just assume that it's a fact of life for them. But have you ever taken the time to calculate how much having all this "stuff" costs you?

For instance, if you need to keep a storage place it could be costing you quite a bit. Just \$50 a month adds \$600 to an annual budget! In addition, how often have you been unable to find something that you know you own and end up buying another one rather than keep looking? Maybe when you recognize how much clutter is costing you'll want to simplify your life.

Examining a Career

Our careers are another area where we often follow a straight path regardless of new information. As long as we're collecting a check we don't take the time to reevaluate our position. But things are changing in most professions. What held true 10 years ago is not true today.

Take some time to evaluate what could affect your job. Is technology making big changes to your job? Will your employer need as many people to perform the task in the future? Could your job be combined with another position?

If you think that your job could be in jeopardy, take steps now to make yourself more employable. Don't wait until you're laid off to get additional job training. There's less pressure looking for a job or taking classes when you're not on unemployment.

Looking at Your Lifestyle

What about your lifestyle? How we live says a lot about what we think of ourselves. Once we become adults, we generally don't expect a lot of changes. However, life always throws us some curves.

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Guidelines for the Safer Use of Alcohol

Nationwide, nearly one in 13 people over the age of 12 has an alcohol-use disorder such as alcohol abuse or dependence. Millions more engage in risky drinking behaviors that jeopardize their health, relationships, productivity, and general well being. According to a newly updated report from Harvard Medical School, *Alcohol Use and Abuse*, even moderate drinking — a drink or two per day — is now considered to be “low-risk” drinking.

Alcohol affects brain-reward pathways involved in developing addiction. Because of this, drink-

ing alcohol on a regular basis can potentially create problematic drinking patterns in anyone. Women and men of all ages and from every walk of life are vulnerable to alcohol-related problems, and their lives may be impaired in many different ways, some more visible than others.

Any amount of alcohol may be risky in certain people under certain circumstances. A person’s unique risk for developing a problem with alcohol depends on a range of factors including their genetic and ethnic background as well as influences from family, culture, and society. Age, gender,

and medical history also affect how people react to alcohol.

A new “low-risk drinking guide” in this report features a series of questions to help people make an informed decision about how much — if any — alcohol is safe for them to drink, and whether they are at risk for problem drinking.

Alcohol Use and Abuse is available from Harvard Health Publications, the publishing division of Harvard Medical School, for \$18 (www.health.harvard.edu/alcohol2011). ■

Source: Harvard Health Publications.

Workplace Survey

Whistling (a Bit More) While They Work

The still uncertain economy hasn’t kept some workers from smiling a little more at the office. Four in 10 (42%) chief financial officers (CFOs) interviewed for an Accountemps survey said that employee morale has improved at least somewhat in the last 12 months. However, slightly

more than half of respondents (53%) said the mood among their teams is unchanged from a year ago.

“Companies have been taking steps to increase job satisfaction and boost employee motivation among teams that have been through a difficult few years,” said Max Messmer, chairman of Accountemps and author of

Motivating Employees For Dummies® (John Wiley & Sons, Inc.).

“Businesses that recognize and address the concerns of staff members during the extended recovery can instill greater loyalty over the long-term.”

Accountemps highlights the top five morale busters and boosters:

Buster	Booster
Assuming employees are lucky to have a job	Thanking staff for jobs well done: Make sure they have the support they need to perform at a high level and advance within the company.
Not answering emails or voicemails from employees in a timely fashion	Staying in communication. If you’re busy at the time the message is received, set expectations of when you will answer the person’s questions.
Ignoring rumors about the business	Sharing information about how the company is performing, even if the news isn’t positive: Have an open-door policy to answer staff questions.
Creating a “no” zone where new ideas languish because they lack support	Encouraging staff to be creative: If you can’t immediately implement a proposed initiative, explain why and let the team know you value their input.
Failing to recognize staff accomplishments	Acknowledging employees for their contributions to the organization’s success: Celebrate top performers by hosting recognition lunches and publicly praising them in front of colleagues and company leaders.

Source: Accountemps (www.accountemps.com).

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Six Steps to Getting the Word Out About Your EAP

By Shelley Plemons, President/
CEO Strategic Sales Solutions

Getting noticed and separating your company from the rest of the pack is a common problem for employee



assistance programs. EAPs that succeed have a sharp focus on their customers, and leverage all of the many channels available to attract business. You can create a marketing plan by following these six critical steps.

❖ **Create a target market analysis.** A target market analysis helps you determine which industries and markets for which you are best suited. You'll want to create an ideal customer profile, which is essentially the minimum requirement your customers must meet in order to benefit from your product. An example profile for your EAP might be health care companies that have a minimum of 3,000 employees and \$1 million in revenue.

❖ **Build a distribution list.** Once you've determined your ideal cus-

tomers, build a database that includes all the pertinent contact information for your potential clients. Maintain it and update it frequently.

❖ **Develop a marketing campaign.** The most effective marketing campaigns plan a year in advance on how to best reach target audiences using several different methods multiple times.

❖ **Implement the marketing program.** It is not enough to depend on one newspaper advertisement or mailer. You must tell people about your product creatively using different methods frequently before they gain awareness of your product or service. There are many different options and some of them are even free. Email blasts, blogs, Facebook, direct mail pieces, and cold-calls are all examples of relatively low-cost ways to reach your audience.

❖ **Follow-up calls.** One of the best ways to gain business is to simply follow-up with a contact with a phone call and an email. If you met someone at a trade show or networking event, add him or her to your distribution list and reach out to this individual within a few days after meeting.

❖ **Tracking and reporting.** The great thing about developing a year-long marketing plan is that you can track your results and make adjustments as needed. Be sure to ask new people how they heard of you. Create a spreadsheet so you can track which methods are working.

Summary

Marketing isn't an exact science. What works for one company may not work for another, but planning ahead and tracking your methodology will help you get ahead of the competition. Avoid making marketing decisions based on desperation or emotion by developing a program based on your customers' needs and a long-term plan. ■

Shelley Plemons has more than 25 years in the behavioral health industry. During that time she worked for several successful companies such as Charter Medical, MHN and Life Care. She founded Strategic Sales Solutions in 2003, and assists clients with strategy and training. Her website can be found at www.strategicsalesolutions.com.

Editor's note: This story is the first in a series that will discuss business solutions for EAPs. If you have a topic you would like covered send an email to Shelley@strategicsalesolutions.com or call 817-946-5334.

... Changing Direction

What we expect doesn't always happen – on the plus side, changes may make it advantageous to reconsider your plans.

Summary

Awhile back I saw a statistic on some of the best corporate managers – people who were known for

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making good decisions. You'd think that they were right a large majority of the time. Wrong! They were only right 53% of the time!

This means that they were wrong nearly half of the time! However, they did have one advantage over less successful managers – they were quick to

acknowledge those mistakes and change direction. There's no reason why you and I can't do the same thing. ■

Gary Foreman is the editor of the Dollar Stretcher website (www.stretcher.com) and various e-newsletters. The Dollar Stretcher is dedicated to helping people live better on the money they already have.