Customer Service Strategies for Substance Abuse Treatment Engagement and Retention
Today we will:

• Identify the characteristics of a welcoming environment

• Understand the concept of a “No Wrong Door” policy

• Use recovery-oriented, strengths-based principles and practices to engage individuals and family members

• Consider the use of culturally relevant and linguistically appropriate screening and assessment tools

• Understand the impact of trauma and how events may affect an individual’s experience with treatment services

• Evaluate personal and organizational strengths and challenges in welcoming and engagement strategies
Getting to Know You
What is Customer Service?

It is a moment of truth...

It is about first impressions...

It is about decision making...

It impacts short-term and long-term satisfaction...
Good and Poor Customer Service
Attitude Checklist

• Do you:
  • Enjoy helping people
  • Care for your customers
  • Give fair and equal treatment to all
  • Have an understanding of people with complex challenges
Bryan Stevenson, *Just Mercy*

- Get “proximate”
- Help change the narrative
- Be hopeful
- Get comfortable being uncomfortable
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Recovery-oriented systems of care (ROSC) are networks of formal and informal services developed and mobilized to sustain long-term recovery for individuals and families impacted by severe substance use disorders. The system in ROSC is not a treatment agency but a macro level organization of a community, a state or a nation.”

-William White
ROSC- A Holistic Approach

Traditional System

• Focused on symptom reduction/stabilization
• Other life domains are not addressed

ROSC

• Symptom reduction with a purpose – a means to an end
• Other domains are a priority - including employment, housing, recreation, spirituality etc.
Elements of ROSC

1. Promotes community integration and mobilizes the community as a resource for healing
2. Facilitates family inclusion
3. Facilitates a culture of peer support and leadership
4. Values partnership and transparency
5. Provides holistic, individualized, person directed treatment which supports multiple pathways to recovery
6. Creates mechanisms for sustained support
7. Is informed by data and the experiences of persons served and families
8. Promotes hope
9. Provides services in a strengths-based manner
## Engagement

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The Goals of Initial Engagement

- Informed Consent
- Trust Building
- Interpersonal Relationships
- Inspiring Hope
- Setting Expectations
- Crisis Stabilization
The Art of Engaging Individuals and Families

- The use of semantics: *Speak so everyone understands what is being said*
- Recognizing that everyone has strengths
- Family members are a valued resource
- Individuals and families are often doing the best they can
- Providers and systems agents need to balance “acceptance with change”
Basic Engagement Strategies

- Active Listening
- Genuineness
- Respect
- Empathy
- Trust
- Really get to know the client
- Understand & support future dreams
- Education and Support
Trauma

- The experience of violence and victimization including sexual abuse, physical abuse, severe neglect, loss, domestic violence and/or the witnessing of violence, terrorism or disasters. (NASMHPD, 2006)

- It is an individual’s experience of the event, not necessarily the event itself that is traumatizing

- Trauma can occur from:
  - Being in a car accident or other serious incident
  - Having a significant health concern or hospitalization
  - Sudden job loss
  - Losing a loved one
  - Being in a fire, hurricane, flood, earthquake, or other natural disaster
  - Witnessing violence
  - Experiencing emotional, physical, or sexual abuse
Trauma Exposure

• Having a significant health concern or hospitalization
• Death of a loved one
• Being in a fire, hurricane, flood, earthquake, or other natural disaster
• Witnessing violence
• Experiencing emotional, physical, or sexual abuse
• A dog bite
• Parenting a child with serious health or mental health concerns
• Lack of food or shelter
• Sudden job change or loss
• Losing a baby through miscarriage
• Separation and/or divorce
• Losing the ability to speak, hear, see, remember
Trauma Informed Care (TIC) provides a new paradigm under which the basic premise for organizing services is transformed.

From "What's wrong with you?" To "What has happened to you?"
Exposure to Trauma

It is an individual’s experience of the event, not necessarily the event itself that is traumatic.

Protective Factors
Proactive Factors that Assist with Trauma

• Resilience
• Social connections
• Concrete support in times of need
• Nurturing and attachment/social and emotional competence of client
“No Wrong Door”

Assessment, referral and treatment planning must be consistent with this principle.

Use creative outreach to promote engagement.

Programs and staff may need to change expectations and requirements to engage reluctant clients.

Treatment plans based on client’s changing needs.

Seamless system of care to provide continuity; interagency cooperation (SAMHSA).
Organizational Assessment - Activity

Take a look at your organization through the eyes of a customer.

What are the first things you notice?

What has the organization done to make you feel welcome?

Does anything make you feel uncomfortable?

How could you feel more at ease?
Definition of Communication

The process by which information is exchanged between communicators with the goal of achieving mutual understanding.
The Meaning of the Message

Receiver of Message
What people see and hear triggers their associations, by which they make sense of the messages they receive.

Sender of Message
Your method and means of sending messages make up your interactional style.

The meaning of the message resides in the receiver.
The Communication Equation

What you **hear**
- Tone of voice expressiveness

**40% of the message**

**WORDS.....**
- ONLY 10% of the message!

What you **see or feel**
- Facial expression
- Dress & grooming
- Posture
- Body Language
- Eye Contact
- Touch
- Gestures

**50% of the message**
Using Your Voice

Do you:

• Become loud when angry or upset
• Speak faster when nervous
• Speak slowly when tired or bored
• Have a cheerful voice
• Have a tone that is warm and understanding
• Find it easy to talk to people you don’t know
• Control your tone in most situations
• Sound bossy, weak or unsure
• Have a clear and easy-to-hear voice
• Speak in a very formal or very trendy manner?
• Think about how you might modify your voice in certain situations
Barriers to Effective Communication

- Language
- Noise
- Time
- Distractions
- Other people
- Put downs
- Too many
- Lack of interest
- Questions
- Disability
- Distance
- Discomfort with the topic
Greeting Customers

• How can we create an environment that is WELCOMING?
• Be attentive, acknowledge a person as soon as they appear, even if you are busy
• SMILE!
• Establish eye contact
• Tell them your name
• Ask how you can help
• Give the customer your full attention
• Be polite and courteous
• Be aware of cultural differences
What does good rapport feel like?

It makes the customer feel comfortable.

It makes the customer feel important and valued.
The Value of Listening

01 Listening shows respect
02 Listening builds relationships
03 Listening increases knowledge
04 Listening generates ideas
05 Listening builds loyalty
Traits of Active Listeners

- Spends more time listening than talking
- Does not finish the sentence of others
- Does not answer questions with questions
- Are aware of biases; we all have them
- Never daydreams or becomes preoccupied with their own thoughts
- Lets the other speaker talk. Does not dominate the conversation
Find out how you can help

How can you find out what people want?

If you can’t help, what should you do?

Offer alternatives if possible

If they have to wait, how would you handle it?
Complex Needs

- marital status
- religion
- disability
- socio-economic status
- ethnicity
- gender
- age
- race
- language differences
- culture
- sexual orientation
Working with Individuals with Complex Needs

01
Be
• Be understanding and accepting of people or situations that do not fit your comfort zone

02
Keep
• Keep your temperament in check

03
Be
• Be aware of your biases
Bryan Stevenson,  *Just Mercy*

1. Get
   - Get “proximate”

2. Help
   - Help change the narrative

3. Be
   - Be hopeful

4. Get
   - Get comfortable being uncomfortable
What do people with behavioral health conditions need?

- Welcoming and Access
- Hope for a Happy Life
- Integrated Relationships
- Empowered Partnership
- Continuity and Flexibility
- Strength-based Learning
- Skills and Supports
- Small Steps of Success

Rounds of Applause
"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel." - Maya Angelou
For more information, contact:

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THANK YOU FOR YOUR PARTICIPATION!
References and Resources

All photographs used in this presentation (Slides 9, 14, 16, and 20) were uploaded free for open source use through www.unsplash.com

Other graphics (slides 3, 5, 19, 24, 25, 30, 33,34, and 38) were obtained through Google images (free images).


References and Resources (continued)


Trauma-Informed Care (slides 16-20) [https://www.samhsa.gov/nctic/trauma-interventions](https://www.samhsa.gov/nctic/trauma-interventions)  

YouTube video (slide 29) [https://www.youtube.com/watch?v=DWynJkN5HbQ&t=8s](https://www.youtube.com/watch?v=DWynJkN5HbQ&t=8s)

White, William. (Slide 9) [http://www.williamwhitepapers.com/rm_rosc_library](http://www.williamwhitepapers.com/rm_rosc_library)