

# Ulliance

Enhancing **People**. Improving Business.

[ulliance.com](http://ulliance.com)

## Life Advisor Total Well-being Program

Presenter: Sarah Barkman



# Who We Are

For over 30 years, Ulliance has been providing a comprehensive range of services to keep your employees emotionally and physically fit.

*"Improving  
the lives  
of the people  
we serve."*

### Life Advisor Employee Assistance Program®



**Solution-based counseling** to manage workplace conflicts, address personal concerns and embrace life challenges.

*“ People bring more to work than just their cell phones or lunches.”*

### Life Advisor Wellness Program®



- Using a unique “solution focused” coaching model
- Higher employee engagement
- Customizable program to fit culture and budget
- Dedicated wellness account managers

### Human Effectiveness Training



- On-site employee & manager training programs
- Compliance and legal training
- Multiple delivery options
- Customized programs to address specific issues

### Organizational & Leadership Development



- Executive & Leadership coaching
- Organizational consulting projects
- Team building & development
- Leadership retreats

### Career Transition Services



- Individual & group outplacement packages
- Experts at addressing the emotional side of job loss
- Mobile app with resumé builder
- Solution-focused counseling & coaching



# Complete Well-being Solutions



# Partner Organizations



We provide support for every industry sector: healthcare, manufacturing, banking & finance, nonprofit, education and higher-learning, professional services and government.

# The Link Between Mental & Physical Health



## Common Effects of Stress



### BODY

- Headaches
- Muscle tension
- Chest pain
- Fatigue
- Stomach upset



### MOOD

- Anxiety
- Restlessness
- Overwhelmed
- Unmotivated
- Depression



### BEHAVIOR

- Overeating
- Drugs/alcohol
- Tobacco
- Anger
- No exercise

**Stress** is the basic cause of **60%** of illness in America.

(Source - American Medical Association)



# The Impact of Stress

- 1 Type 2 Diabetes 41%
- 2 Cancer 33%
- 3 Arthritis/musculoskeletal 32%
- 4 Obesity 29%
- 5 Heart Disease 27%
- 6 Hypertension/high blood pressure 26%
- ★ 7 Depression/mental illness 20%
- 8 High cholesterol 11%
- 9 Smoking 9%
- 10 High-risk pregnancy 4%

(Source - Workplace Wellness Trends Survey)

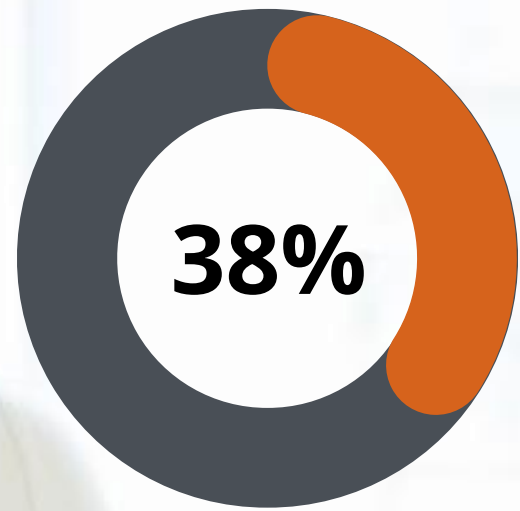


## The Impact of Depression

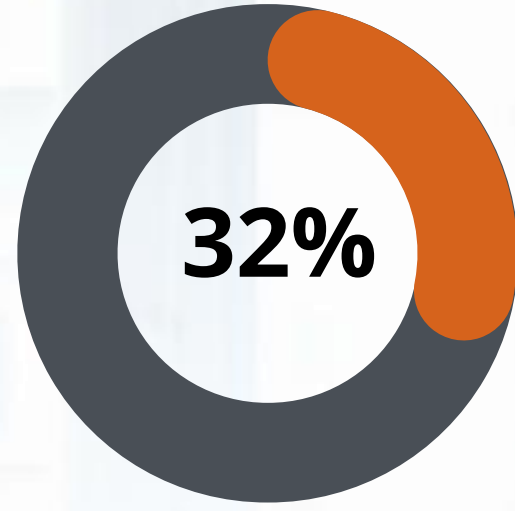
People with **depression** have **40%** higher risk of developing cardiovascular and metabolic diseases than the general population.

# Top 10 Costly Health Conditions

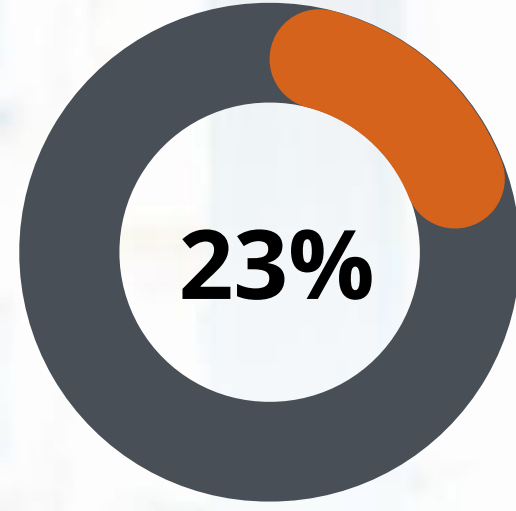
# Mental Health And Our Behavior



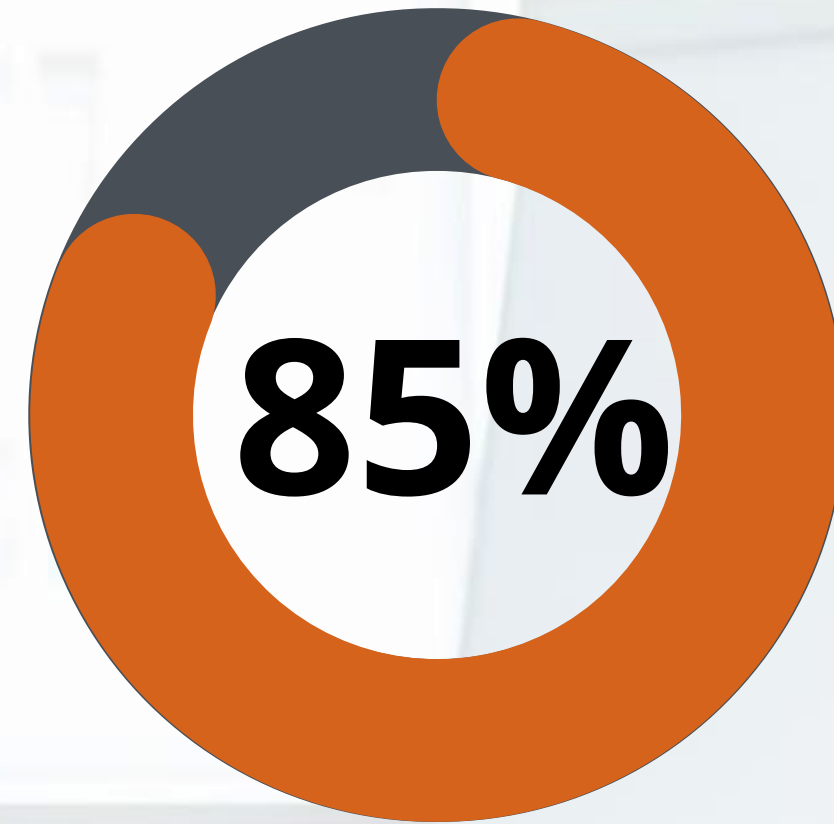
Difficulty concentrating



Avoiding social activities

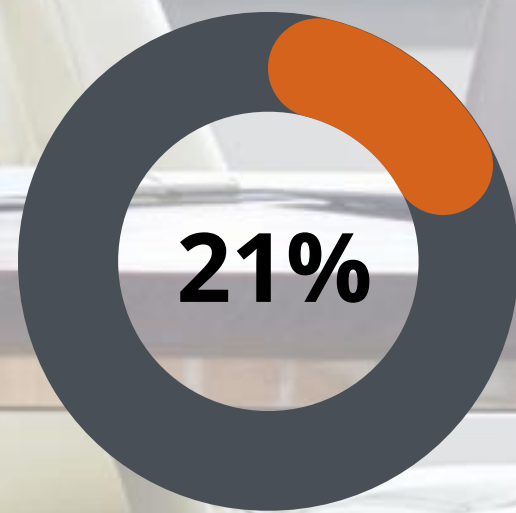


Less responsive to email and other communications



## Absenteeism

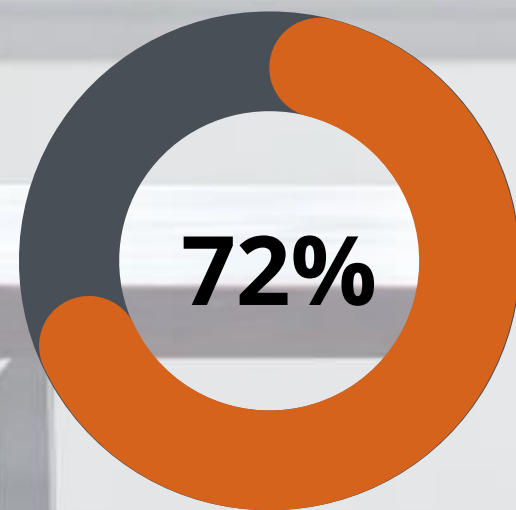
Respondents reported missing an average of eight days of work in the past year, an 85% increase from 2019. 17% Of respondents missing more than 10 days of work due to mental health, 5.7 times more than in 2019 (3%).



Taking longer to do tasks



Difficulty thinking, reasoning, or deciding

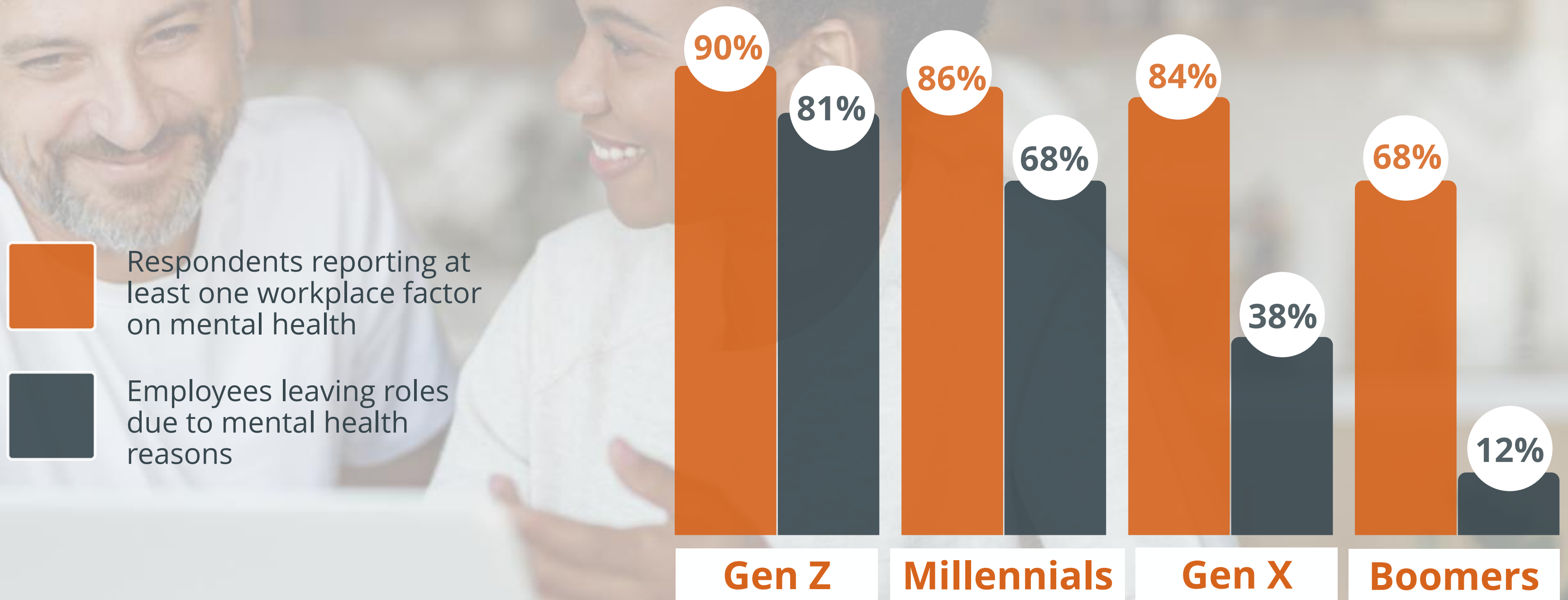


Overall performance



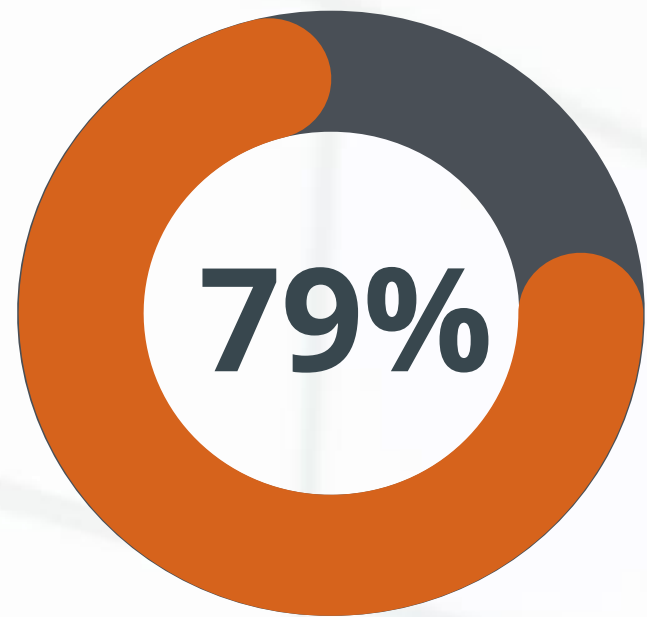
# The Impact of Mental Health

# Generational Impacts of Mental Health



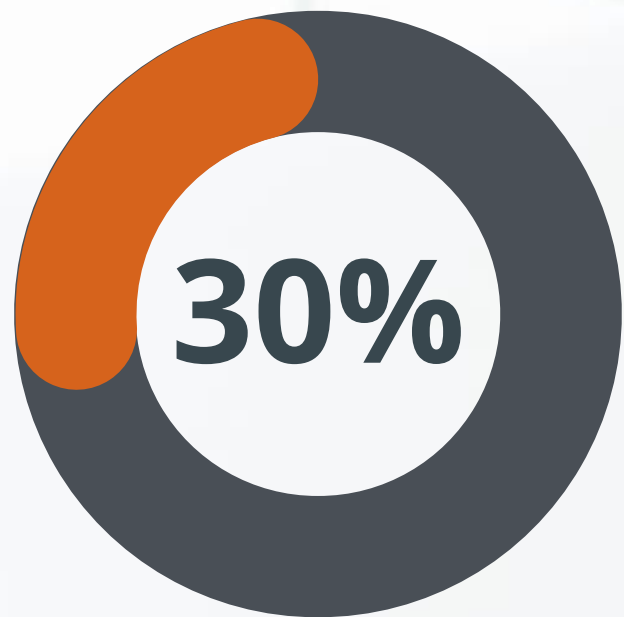
## The Impact of Mental Health





### 2020

Over 79% of adults aged 19-25 suffered moderate to severe depression. Over 75% in the same age group suffered moderate to severe anxiety.



### INCREASE

The national suicide rate has increased 30% between 2000 - 2020. Suicide is the 2nd leading cause of death for Americans under the age of 35.

### 3X

Pressure of education, social acceptance and lack of life structure greatly impacts the mental well-being of millennials—they are more than 3X as likely to suffer from depression and anxiety.



## “The Changing Workforce”

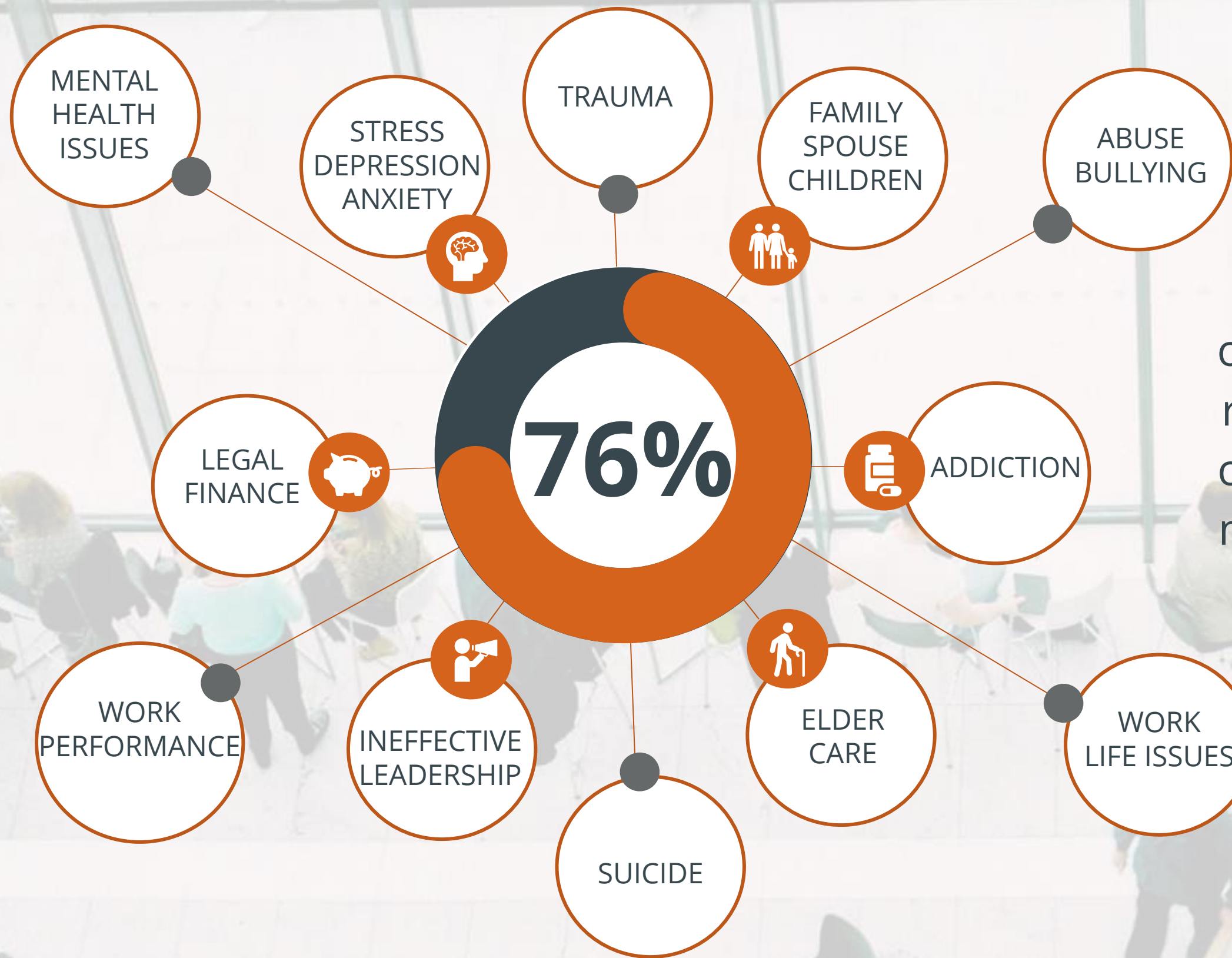
Millennials (those born between about 1980 and 2000) comprise half of the American workforce and by 2025, 75 percent of the global workforce.

<https://www.cdc.gov/nchs/products/databriefs/db330.htm>

<https://mhanational.org/research-reports/2022-state-mental-health-america-report>



# The Future of Mental Health



**76%**  
of the workforce reported at least one symptom of mental health in the past year.

(Source- Inc. Magazine)

## DIRECT COSTS

- \$ Physical Health Claims
- \$ Behavioral Health Claims
- \$ Psychotropic Medications – RX
- \$ Workers' Comp Claims
- \$ Loss of Revenue
- \$ Recruiting Costs

## PRODUCTIVITY COSTS

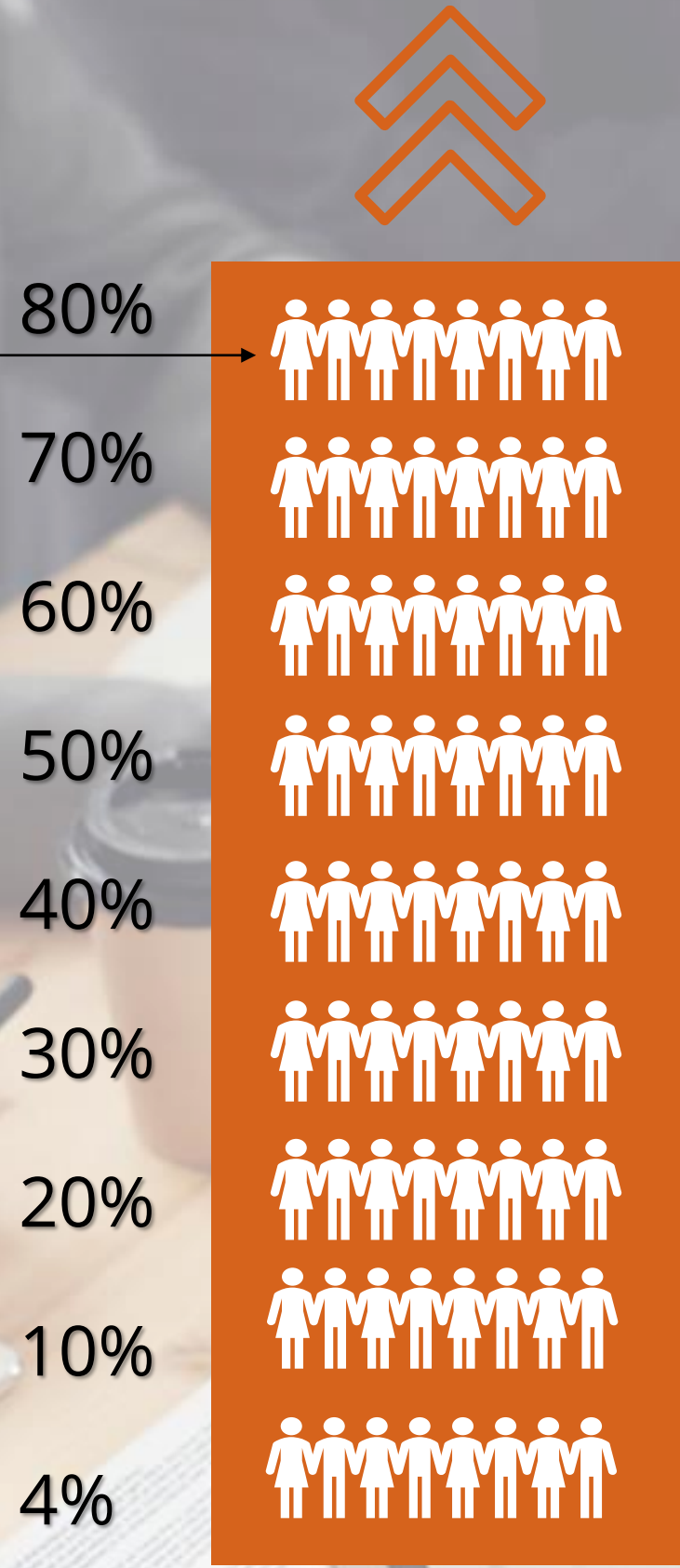
- \$ Time Loss/Productivity
- \$ Presenteeism
- \$ Turnover
- \$ Safety
- \$ Culture & Engagement
- \$ Burnout



# Personal Issues Impact the Workforce

## Cost Impact—Behavioral Health

**76%**  
Life issues impacting your workforce.



**4%**  
National EAP Utilization



“  
*With anxiety and stress related issues on the rise—traditional EAPs with low utilization rates are NOT the solution to address this growing epidemic.*”

# Traditional EAPs



# Broken Model

Fixed visit models are not meeting the needs of today's organizations. Often advertised as an assess-and-refer model, most fixed visit models act more as a behavioral health concierge (that help people 'get help') rather than providing a solution that is focused on resolving issues.

## Traditional EAPs

Nearly every organization offers some form of an EAP, and yet mental health concerns are on the rise while EAP utilization remains very low.

### WHY IS THAT?

- POOR COMMUNICATION**

Whether intentional or not, EAP benefits are typically communicated very poorly. HR and Benefits teams already have too much on their plate to develop an effective communication strategy. Their EAP partners provide minimal help.
- NO CHAMPION**

With good intentions, most EAP programs get implemented with the best goals in mind. However, without a dedicated effort, accountability and resources, the utilization reports tell the rest of the story.
- MISSION DRIFT**

What is the mission of your EAP provider? Many organizations are part of, or affiliated with, an insurance company. When the mission is to sell more insurance, EAP utilization is treated more like claims experience than program success.
- LIMITED COVERAGE**

One of the biggest limitations to utilization is access to coverage. Not having a robust network for face-to-face visits, web resources, mobile applications, video counseling, and language interpretation support are just some of the reasons employees are not using EAP assistance.

# Resolution EAP Model®

## What makes our program different?

Our trademarked **Resolution EAP Model®** is a proprietary short-term counseling model that offers a flexible number of visits - unlike the fixed number of visits offered by traditional EAP's. We have developed this program specifically to meet the mental health needs of today's complex and changing workforce.

- 1) Flexible visits** - The Resolution EAP Model® is not limited by a predetermined number of visits.
- 2) Issue resolution** - Our 'solution-focused' approach helps to resolve or manage 94% of the situations within the EAP.
- 3) Total Well-being** - Life Advisor Portal & Health Tracker
- 4) HR & Benefits services** - Dedicated service features with a customized approach.
- 5) Health plan protection** - Diverts behavioral health and claims to the EAP and reduces the associated health claims that are attributed from mental health.



The   
Alliance  
Proven  
Process



## 5 to Thrive

Total Well-being—the full integration of the five dimensions of well-being.

1. **EMOTIONAL**
2. **PHYSICAL**
3. **FINANCIAL**
4. **CAREER**
5. **COMMUNITY**



# Well-being Dimensions



We meet people where they are on their well-being journey.



**TECH**

Tech prefers to communicate via technology.



**TALK**

Talk prefers communicating via phone or in person.



**FLEX**

Flex prefers to communicate via technology & direct communication.



# User Personas



**Results are  
our Evidence**

**10%**

### **Clinical Utilization**

Our client annual clinical utilization is more than double the **national average (4%).**

**18%**

### **Service Utilization**

On average 18% of employee/dependents issues are managed within our Solution-Focused Resolution EAP Model® — avoiding additional claims costs.

**98%**

### **Renewal Rate**

Our client renewal rate is nearly 100% for 30 years and counting.





# Counseling

- Short-term, solution focused counseling
- Life Advisor EAP counselors
  - Seasoned professionals
  - On average, 8 years of post-master experience
  - State licensed and/or certification(s)
  - Specialized training in short-term treatment
  - National & international counseling network
- Available Face to Face and via Telehealth
- Coverage for your family:
  - Employees
  - Spouse/partner
  - Dependent children



## Employee Services

# Services

- **24-hour Crisis line**

- Counselors can be reached 24 hours a day, 365 days a year, to assist with an urgent problem or crisis. There is no cost to the employee/dependent for this call.

- **Language Line**

- Ulliance utilizes a state-of-the-art language line that has the capability to interpret over 200 languages. Special telephone services are available for hearing impaired employees and dependents.

- **Confidentiality**

- Confidentiality is crucial to a successful EAP. To ensure client confidentiality, Ulliance complies with all Federal and State regulations including HIPAA & HITECH.



# Employee Services



# Coaching

- Coaching available via Telehealth
- Assistance in setting and achieving self-improvement or professional development goals.

This may include:

- Professional development
- Communication skills
- Stress reduction
- Conflict resolution
- Financial or savings goals
- Well-being goals
- Self-Improvement goals
- Educational goals



# Employee Services



# Life Transitions

Today's work environment promotes the balancing of career and personal life commitments. We will provide employees with support, referrals and assistance with many of life's transitions.

- Child Care & Aged Loved Ones Assistance
- Grandparents
- Parenting
- Relationships
- Special Needs
- Work & Family Balance
- Retirement
- Expatriate/Repatriating
- Moving/Job Relocation
- Getting Married
- Having a baby



## Employee Services

# Life Advisor Well-being Portal & Health Tracker

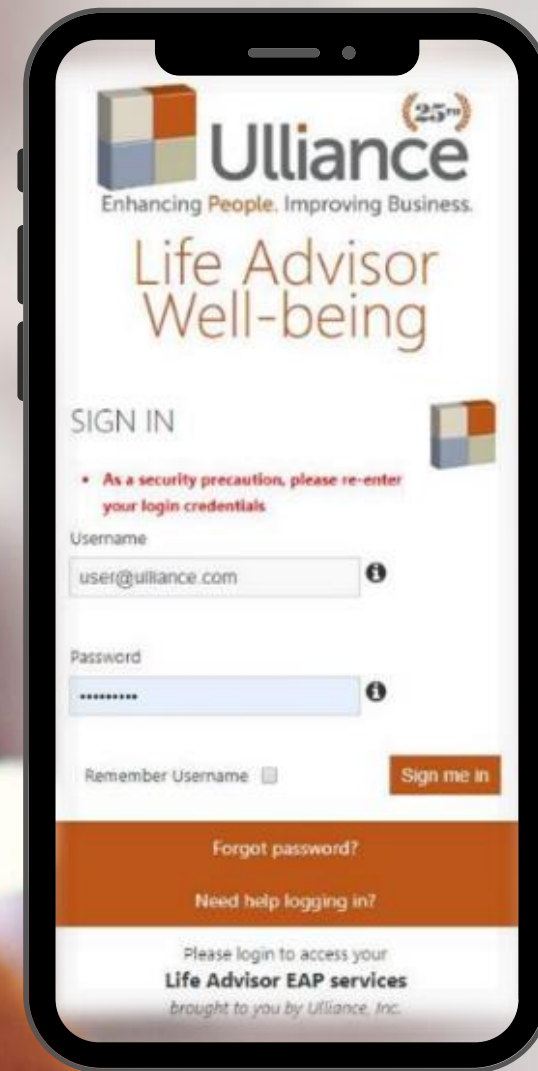
- 5 Dimensions of Well-being
- Resource library featuring assessments, thousands of articles and videos on behavioral health, finance, wellness, prevention & more
- On-demand orientation videos
- **Smart Manager Webinars** - on topics such as: Improve Your Mood, Avoiding Burn Out, etc.
- **Smart Employee Webinars**
- First Responder Bulletin
- Well-being journal
- Newsletters
- Health and well-being trackers
- Individual well-being challenges

*\*Integrations from wearables requires Wellness Program addition*



# Well-being Portal

# Life Advisor Well-being Portal



- *Text* to request an appointment
- *Click to send an email* to open your default email application
- *Click to call* to speak with one of our trained employee counselors
- *Fully responsive* portal on all handheld devices
- *Watch a video* on how the EAP works
- *Send us your questions* directly through the form in the portal
- *Log in* & request a call or appointment
- *Connect with us*—we're social
- *Browse* through a robust resource library



## Mobile Technology





# Life Advisor Message Center

## How it Works

- **Message Center-** A central location that brings together all of your Live Advisor communications in one spot – (promotions, notifications, emails, chats, texts, newsletters, orientations, surveys and more!)
- **Secure Chat-** A secure, online chat with our Life Advisor Consultant team about any of the concerns the Life Advisor program can assist you with.
- **Texting-** Once an individual opts-in, the text program can be used to receive additional information about the Life Advisor services, receive push notifications on our services, or talk with a coach that can provide you with non-clinical support. This conversation can seamlessly transition to a Secure Chat above if needed.
- **Notifications-** Throughout the year, the Life Advisor program pushes secure notifications a user would receive on their next login that highlights new service features, trending well-being topics, or new well-being program content.
- **Bot Chat-** Need a quick breathing exercise to get through an anxious moment? Or approaching an employee who's dealing with an emotional issue and you need to know what to say and how to say it? Our bot chat can get you to the topic and level of information you need with a few clicks across all dimensions - emotional, physical, financial, career, and community.

**Ulliance**  
Enhancing People. Improving Business.

EMPLOYEE DISCOUNTS & SPECIAL OFFERS  
MEMBER OF **working ADVANTAGE**

Ulliance, Inc. is proud to offer you FREE access to the Working Advantage members-only program! This unique program gives you access to exclusive discounts and special offers to theme parks, shopping, movie tickets, hotels, Broadway shows and much more - with savings up to 60% Off!

**WELCOME!**

**RETURNING USERS: LOG IN**

Email

Password

Remember Me [Forgot Your Password?](#) **LOG IN**

OR

**NEW USERS: SIGN UP TO BECOME A MEMBER**  
\*All Fields Required

First Name\*

Personal Password\*

Confirm Password\*

Email Address\*

Confirm Email\*

Country\*

**Some of the benefits include:**

- Theme Park & Amusement Park Tickets
- Online Shopping and Service Discounts
- Broadway Theatre
- Movie Tickets
- Ski Tickets
- Hotels Worldwide
- Rental Cars Worldwide
- Zoos and Aquariums

# Working Advantage Discount Program

The Working Advantage Discount Program provides discounts of up to **70%** off to employees and their dependents. **Sign up for free!**

- Work from Home Essentials
- Streaming Services: Disney+, Showtime and more
- Sam's Club Memberships - opportunity to purchase for your employees or for them to purchase themselves - over 40% off
- Education & Enrichment: Language Learning, Audiobooks and more
- Health & Wellness
- Home Office: Electronics, Laptops and more
- Insurance, Home Security and Protection Services
- Food & Wine
- Online Shopping: Walmart, Walgreens, Macy's
- Financial Services
- Pet Supplies
- Hotels, Rental Cars
- Entertainment

[WorkingAdvantage.com/ulliance.com](http://WorkingAdvantage.com/ulliance.com)



# Employee Services





# Financial Counseling

Members can find possible causes and solutions to their financial concerns by utilizing **a free 30 minute (per issue) telephonic or in-person consultation with a financial counselor.**

This rate will include a 15% discount.

## **Examples Include:**

- Debt Management Programs
- Financial Education
- Budgeting
- Financial Planning



# Employee Services



# Legal Consultation

Members can receive up to 30-minute consultations (per issue) with local Plan Attorney and a **25% discount off attorney's normal hourly rate.**

- Up to 6-page document review FREE or at 25% discount
- Simple Dispute Resolution included
- Simple Will included



## Employee Services

# Legal Services

## DID YOU KNOW?

There were 4.8 million identity theft and credit card fraud reports to the Federal Trade Commission in 2020, resulting in \$4.5 billion total loss.

Identity theft and fraud can cause stress, anxiety and even financial hardships. This is why Ulliance has partnered with **IDIQ** to provide a **FREE credit & identity theft protection** element to our EAP!

Employees can sign up for this **FREE** service through our **LifeAdvisor.com portal**.

We recognize that the threat of having your identity stolen is at an all time high. Protecting your identity is essential in today's ever-evolving tech world.

The logo for IDIQ, featuring the letters 'IDIQ' in a bold, sans-serif font. The 'Q' has a small registered trademark symbol (®) to its upper right. A stylized orange and grey graphic element is positioned to the right of the 'Q'. The logo is set against a white background within an orange-bordered box.

IDIQ<sup>®</sup>



# Employee Services

# Account Management

## Dedicated Account Manager

- Advanced Degreed/Licensed Counselors
- Seasoned/Experienced professionals
- Experienced in providing consultation regarding personal performance problems and work/life concerns
- Conducts quarterly service reports
- An Account Manager is always on call **24/7/365**



# HR & Management Services



# HR Consultations

- Harassment & Conflict
- Gambling Problems
- Co-worker Conflict
- Critical Incident Stress Management
- Emotional/Psychiatric
- Anger Management
- Substance Abuse/Addiction
- Workplace Aggression/Anger
- Employee Death/Suicide
- Performance Issues
- Policy Violations
- Difficult Terminations



## HR & Management Services



## Referrals

### Informal

- Suggestion from Administration to use the EAP benefit
- Participation information not available due to HIPAA

### Formal

- Employee demonstrates work performance issue
- Release allows for attendance and compliance updates





**CRISIS  
AHEAD**

## **Managing Critical Incidents In The Workplace ► Crisis Support (CISM)**

- Critical Incident Stress Management
- 24-hour expert support and intervention
- Expert help to stabilize organizational crisis
- Specialized crisis management team
- **Unlimited** on-site debriefings and in-person grief counseling
- Fast response for sudden crises

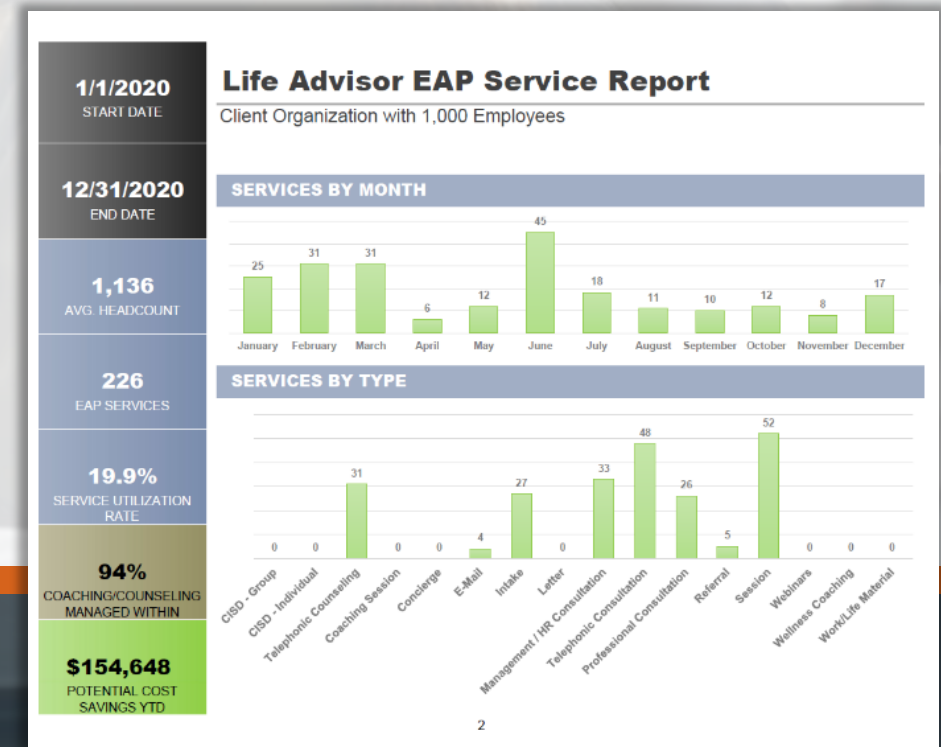


# **HR & Management Services**



# Service Reports

- Quarterly Reports reviewed with your Account Administration
- Valuable information on EAP usage & trends
- Develop action items to improve employee population

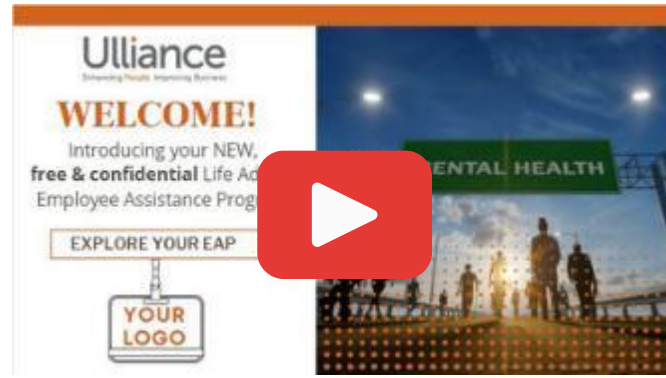


# HR & Management Services





Explainer video



Postcards



Employee webinars



Manager webinars



Monthly employee newsletter



Quarterly Manager newsletter



Cards



Monthly employee video

- Introduction/welcome letters
- Printed flyers, posters, wallet cards
- Postcards sent to employee's home
- Monthly Employee Life Advisor Newsletter & bonus material
- Monthly video to post onsite
- Custom "How It Works" video
- Quarterly Smart Manager Bulletin
- Smart Manager webinars
- Employee webinars
- Vendor fair - Ulliance attendance
- Explainer Videos



# EAP Promotion & Communication



## Employee Orientations

- Educate & inform employees of the valuable resources in the EAP
- Delivered in-person or video

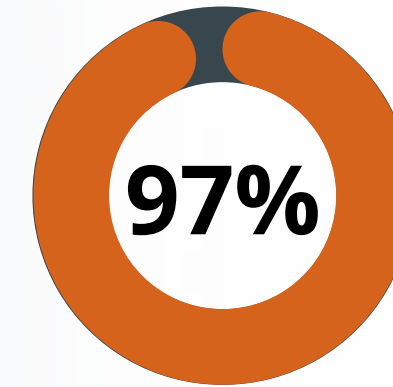
## Supervisor Orientations

- Become familiar with critical incident support, HR consults and the informal & formal referral process

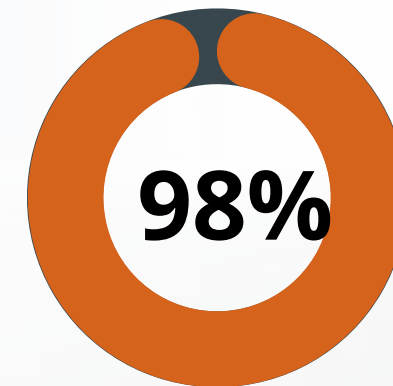
# HR & Employee Orientations



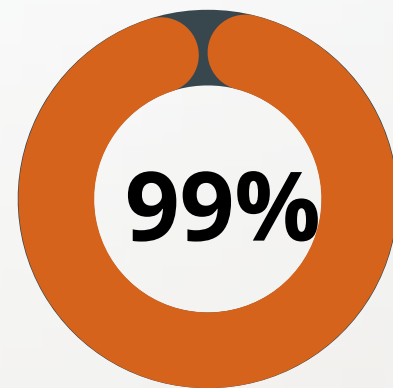
## What People Say...



*Satisfaction with counseling and authorization process*



*Satisfaction with counselor (choice & or quality)*



**Overall Satisfaction**



# Client Satisfaction Results



# Fees & Billing

 Flexible Visit Resolution EAP Model®	
Your Return on Investment	94%
Dedicated Account Manager	✓
Discount Program	✓
Legal Support	✓
Promotional Materials	✓
Orientations	✓
Resource Portal	✓
Coaching	✓
Mobile App	✓
Credit Debt Management	✓
Custom Explainer Video	✓
Service Reports	Quarterly
CISD	Unlimited
<b>Fees</b>	<b>\$2.28 PEPM</b>

\*Quote is based on **800** employees

Travel (airfare, lodging and mileage, etc.) expenses incurred for supervisor trainings, employee orientations, implementation meetings, and other on-site services at locations outside of areas served directly by local or regional offices will be billed at our actual cost.

Once fees are quoted, they are valid for the next sixty days.

Created 06-24-2024

“



We stand behind our commitment to provide your organization with the highest caliber of service!

”



If for any reason you are dissatisfied with Ulliance services during the first 120 days of implementing your Life Advisor EAP, Ulliance will refund 100% of your fees paid.

We believe actions speak louder than words and are ready to deliver quality service!



***No other EAP provider offers a 100% money back performance guarantee.***



# 10 Ways We're Different

1

**Trademarked  
Proven Process**

2

**Dedicated  
Account Manager**

3

**HR Services**

4

**Promotion**

5

**Technology**

6

**Utilization**

7

**ROI**

8

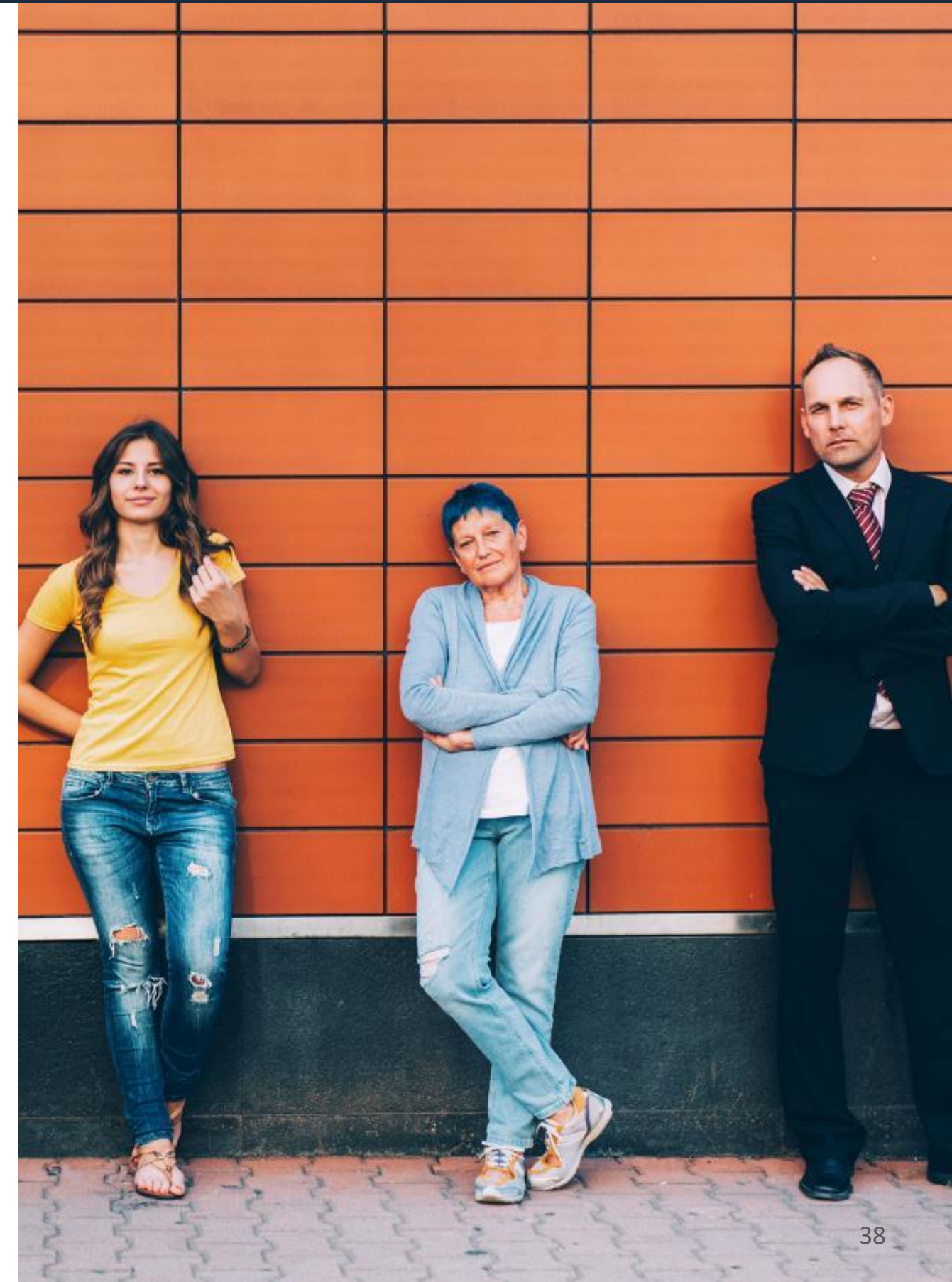
**Total Well-being**

9

**Implementation**

10

**International  
Coverage/Local  
Presence**





# Ulliance

Enhancing **People.** Improving Business.



# Thank you!