

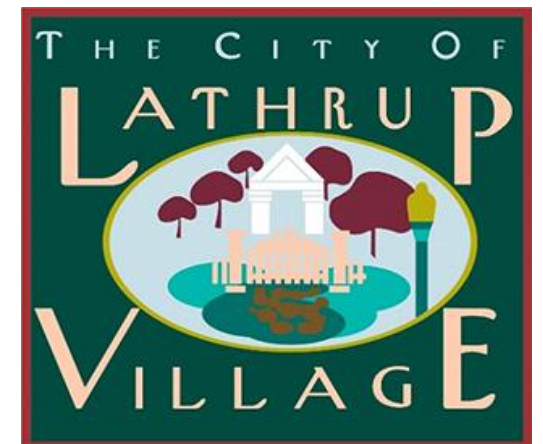
# Ulliance

Enhancing **People**. Improving Business.

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

## Life Advisor Total Well-being Program

Presenter: Joel Schudiske





01. INTRODUCTION
02. VISION & MISSION
03. WHO WE ARE
04. PARTNERS
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06. HISTORY & STATS
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08. EMPLOYEES & SERVICES
09. REPORTING & PROMOTION
10. FEES & BILLING



# Table of Contents

# Who We Are

For over 30 years, Ulliance has been providing a comprehensive range of services to keep your staff 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%



## The Impact of Depression

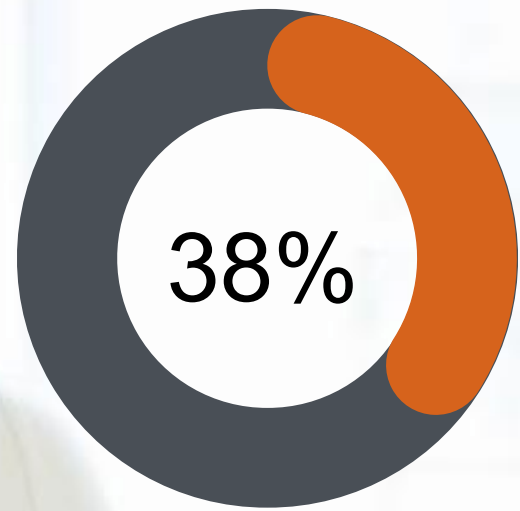
People with **depression** have **40%** higher risk of developing cardiovascular and metabolic diseases than the general population.

(Source - Workplace Wellness Trends Survey)

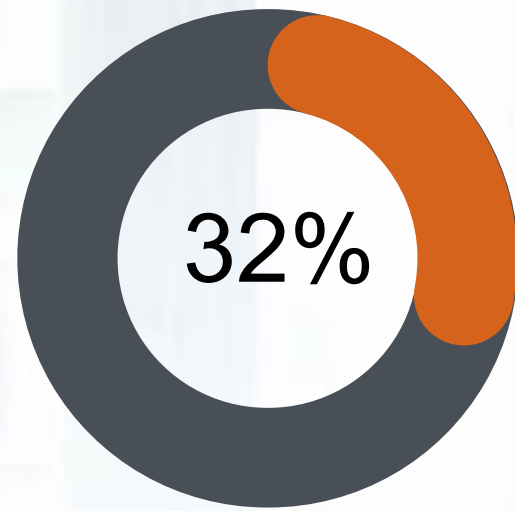


# Top 10 Costly Health Conditions

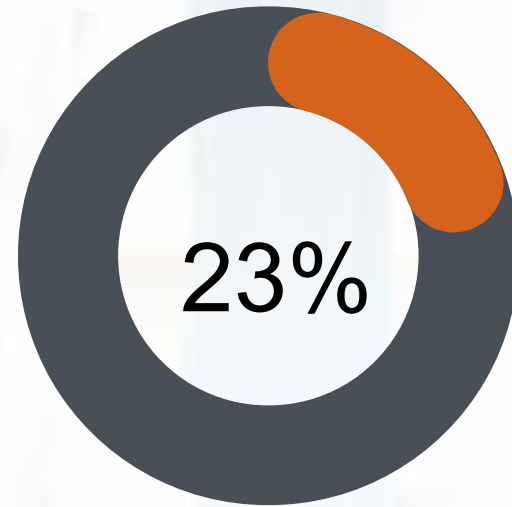
# Mental Health And Our Behavior



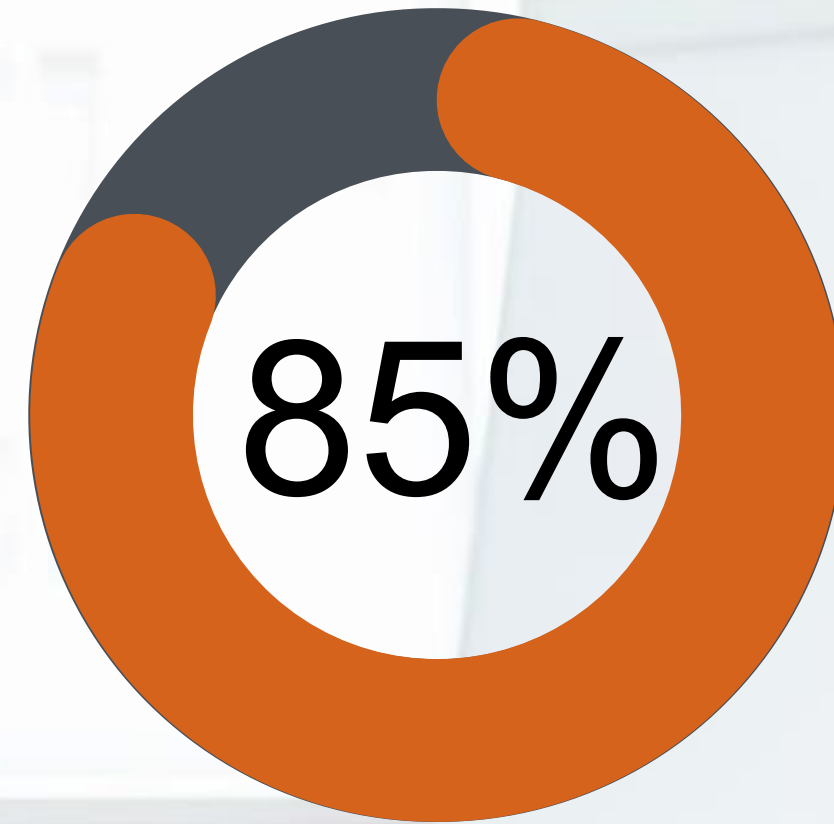
Difficulty concentrating



Avoiding social activities

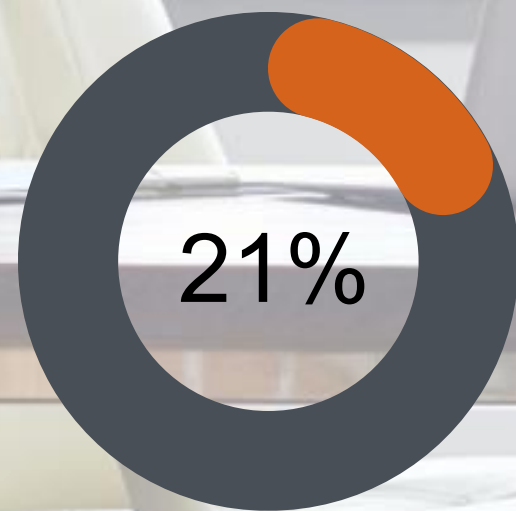


Less responsive to email and other communications

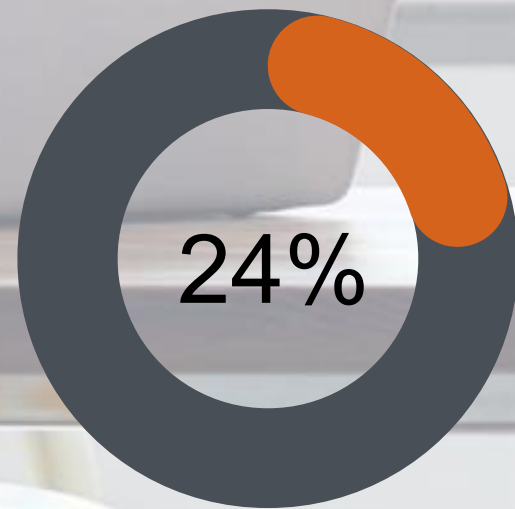


## Absenteeism

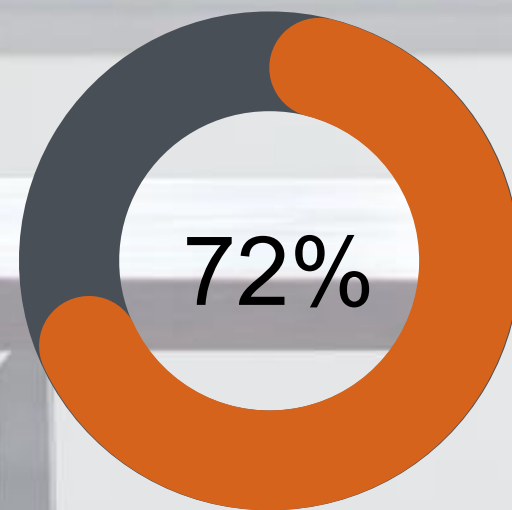
Respondents reported missing an average of eight days of work in the past year, an 85% increase from 2019. 17% of respondents missing more than 10 days of work due to mental health, 5.7 times more than in 2019 (3%).



Taking longer to do tasks



Difficulty thinking, reasoning, or deciding



Overall performance



# The Impact of Mental Health

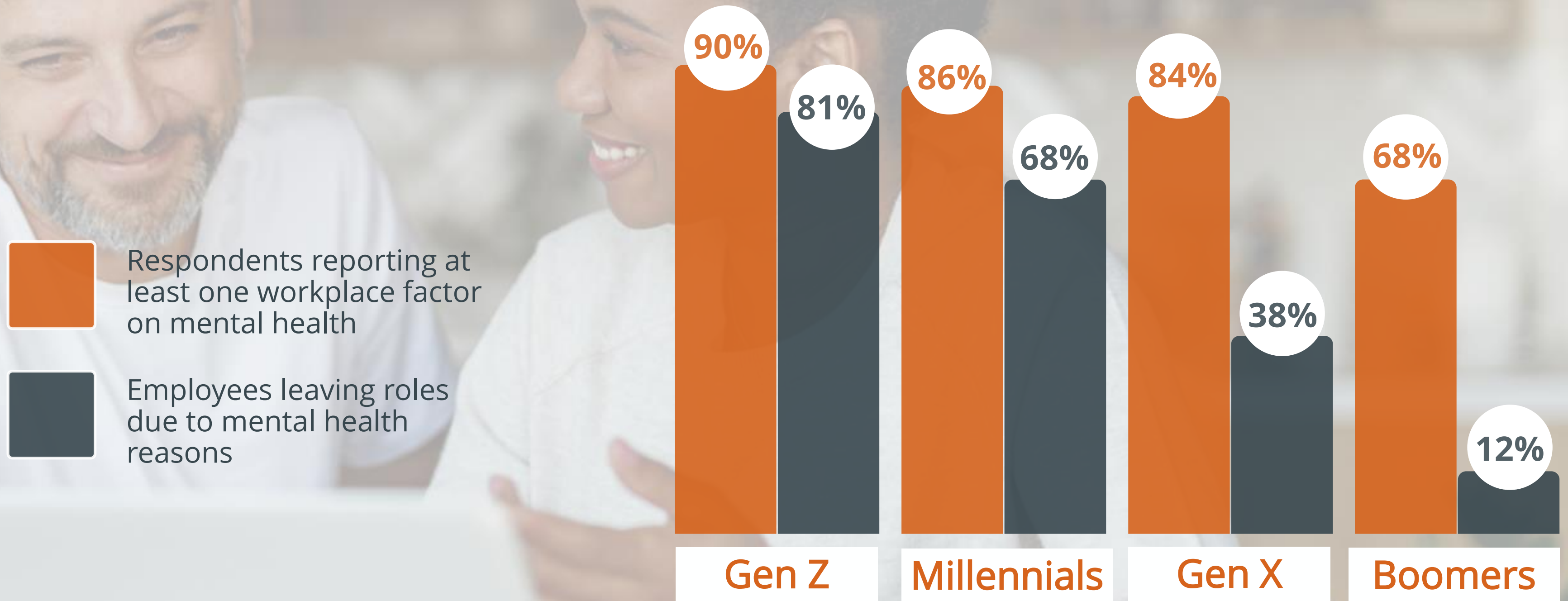




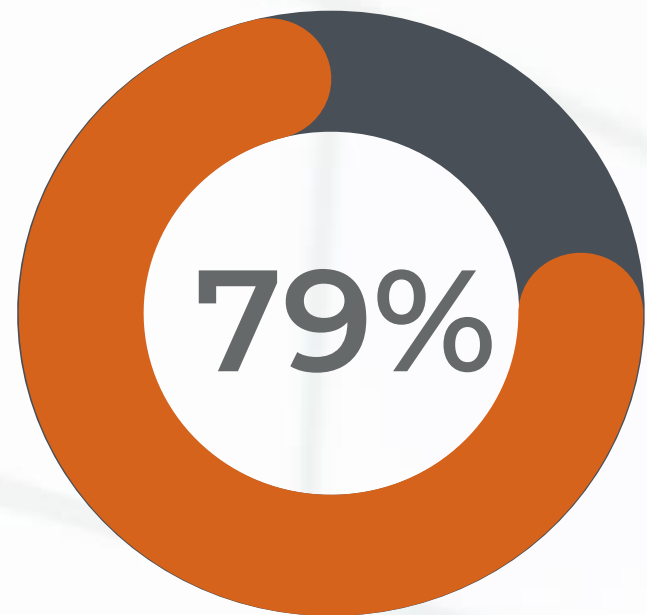
Mental and physical health are interrelated and equally as important. Research shows that our environments — including the workplace— have a direct impact on our mental health. **Unhealthy work environments have been shown to cause the onset of mental health conditions.**

Source:<https://www.who.int/teams/mental-health-and-substance-use/promotion-prevention/mental-health-in-the-workplace>

# Generational Impacts of Mental Health

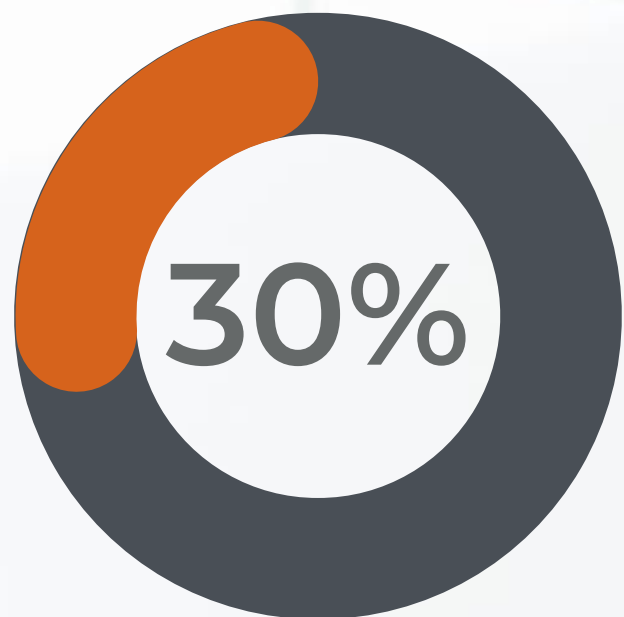


## The Impact of Mental Health



### 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”

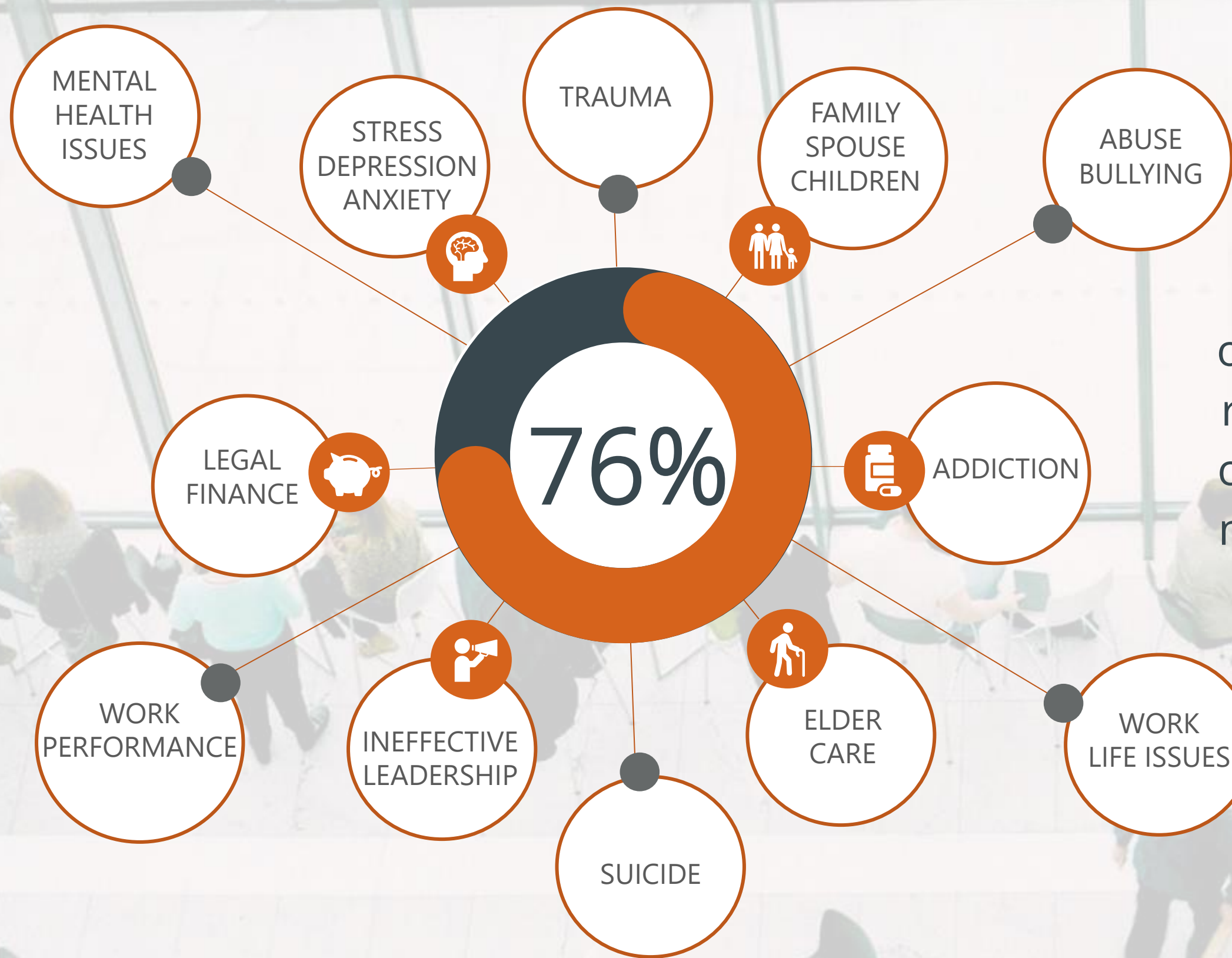
Millennials (those born between about 1980 and 2000) comprise half of the American workforce and by 2025, 75 percent of the global workforce.

<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



**85% of first responders have experienced symptoms related to mental health conditions.**

They are also impacted by PTSD. In 2020, 116 police officers died by suicide. In 2021, more than 140 police officers died by suicide.



# 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   
Ulliance  
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

# OUR PROVEN PROCESS



*"Meeting your employees where they are."*

TECH | FLEX | TALK



# Life Advisor Resolution EAP Model



# Our Resolution EAP Model Process



## Short Term Solution Focused Counseling

- **Stage 1**  
Assess and clarify the core problem
- **Stage 2**  
Identify solutions and alternatives
- **Stage 3**  
Develop a plan of action
- **Stage 4**  
Implement the plan while making adjustments

Our **Resolution EAP Model®** led by **certified counselors**, utilizing an upward spiral approach, helps individuals explore and ultimately resolve problems that could be impacting performance, happiness or success in one's life.



SLF	WRE	PLD	EEB	
20,369	890	6,350	10,980	
(+588)	(+20)	(+200)	(+588)	
MBC	LRF	MJD	PDN	NFR
3,605	9,542	2,609	7,654	6,522
(+210)	(+100)	(+30)	(+100)	(+122)
YBY	OMR	MMU	BT	RCM
3,204	5,211	7,100	7,150	782
(+20)	(+100)	(+10)	(+20)	(+70)
WRE	WRE	NFR	OMR	LSD
3,200	712	2,000	631	(+10)
(+10)	(+10)	(+10)	(+10)	(+10)



**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 staff/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 in-person, via video & telephonically
- 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

- Telephonic and video coaching
- 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, 750+ videos, 35,000+ articles 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




**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
- Family Fun

# Working Advantage Discount Program

The Working Advantage Discount Program provides discounts of up to **70%** off to employees and their dependents **on travel, food, clothing, activities and more!** Free to sign up!



[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](https://www.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 (®) and a stylized orange and grey graphic element resembling a checkmark or a pen nib. The logo is set against a white background within an orange-bordered square.

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**





## Employee Orientations

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

## Supervisor Orientations

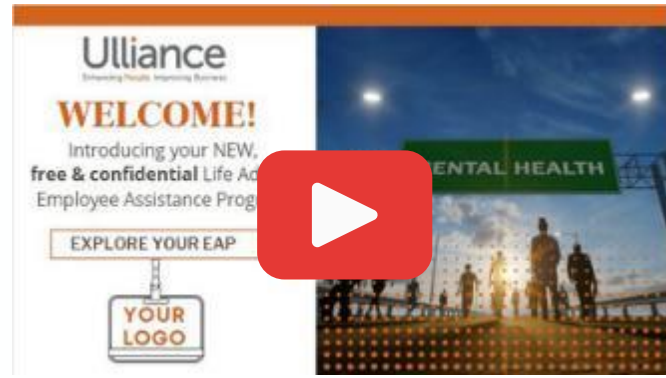
- Become familiar with critical incident support, HR consults and the informal & formal referral process



# HR & Employee Orientations



Explainer video



Postcards



Employee webinars



Manager webinars



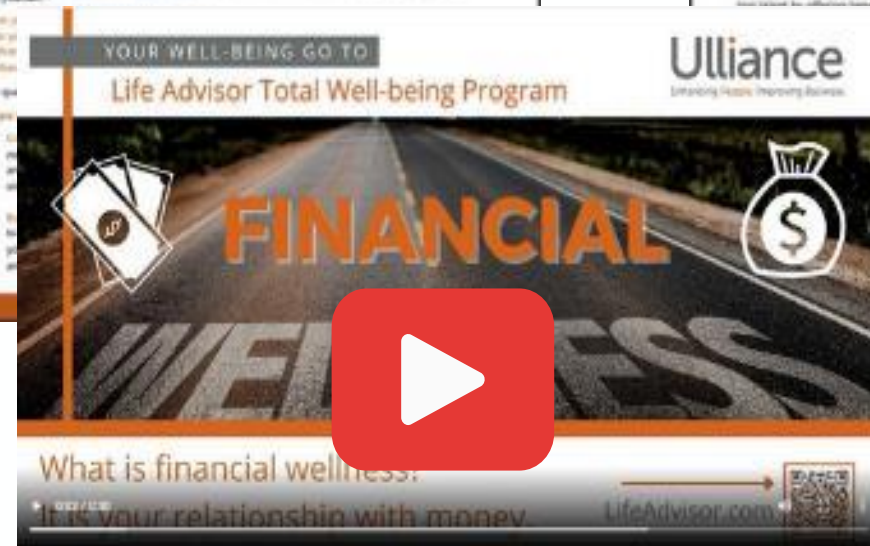
Monthly employee newsletter



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



# 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 Referral

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

## Formal Referral

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





**CRISIS  
AHEAD**

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

- Critical Incident Stress Debriefing
- 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

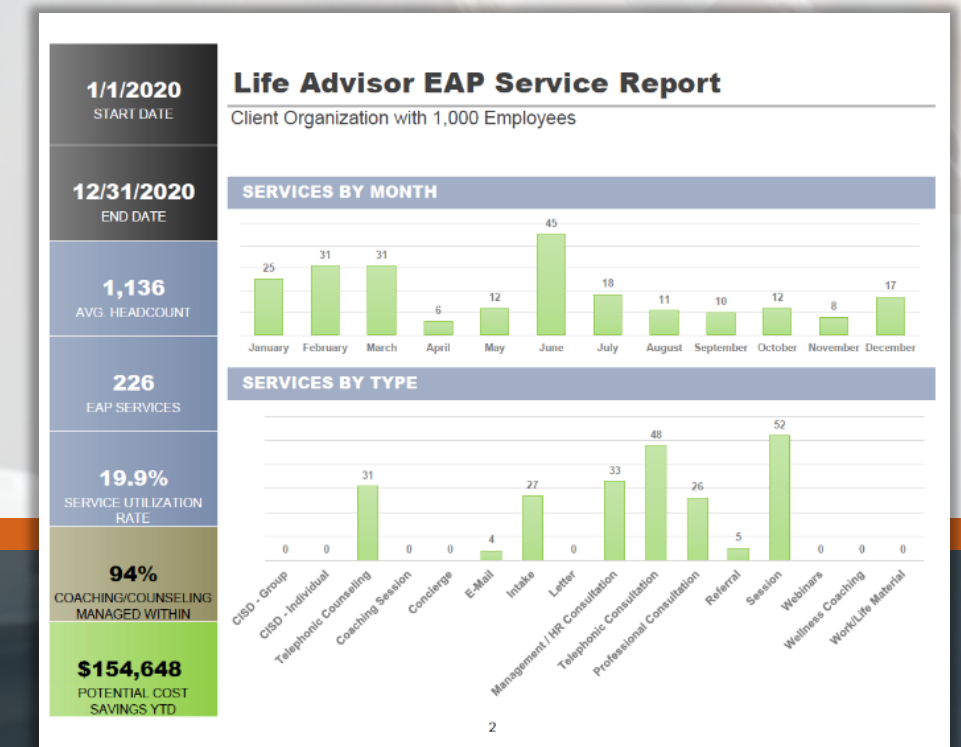


**HR & Management Services**



# Service Reports

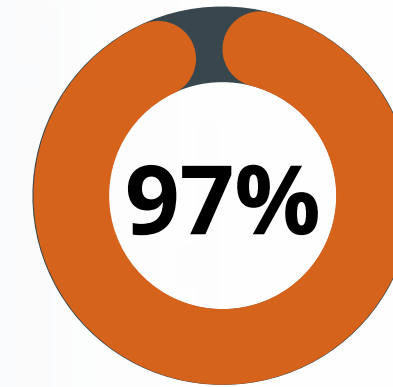
- Quarterly Reports reviewed with your Account Administration
- Valuable information on EAP usage & trends
- Develop action items to improve employee population



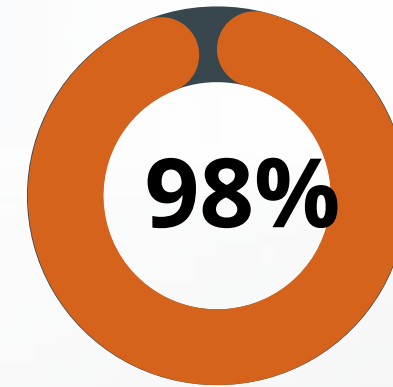
# HR & Management Services



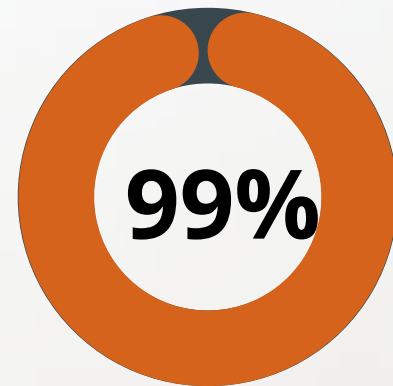
## What People Say...



*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>\$6,500 Per Year</b>

\*Quote is based on 25 employees

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

Created 01-20-2023



“



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!