

Mental Health for Intake Specialists

This month I'm not teaching specifics on how to sell, empathy or convert prospects. This month I wanted to talk about the Mental Health for Intake Specialists. As you know, we listen to lots of prospect call recordings, and I hear first hand what your team is dealing with every day.

Here's a brief unedited example of what was said on a real prospect call to an Intake Specialist:

"I was looking for online options its going to make me emotional talking (caller is crying) about this when I was around 20 years old I was diagnosed with depression someone diagnosed me with bipolar its been like this all over the place. I've tried and tried to get help it's been impossible (still crying) I was in an abusive relationship 6 years ago. I have anxiety and PTSD. Some of my family has schizophrenia. I cannot often cope with life the way that most people can. I've tried counseling. I was told my issue was my relationship. I've been constantly shuffled around by doctors. I have an appointment next week with a new counselor. Then, Covid hit, and I can't go back to work, so I got even more depressed. I'm having so much anxiety. I've been struggling with I would never resort to suicide I just wouldn't I have a daughter I have a family, but I have those thoughts not a lot but enough because I'm overwhelmed with life. I know I'm different than other people. I have a fear of participating in life the way others do and I don't feel like I can do it."

These types of calls happen everyday in **all** practice areas. This is a mild example of a call your team would take.

Intake Specialists can easily take on the trauma of the callers. Did you know this? Do you have a process in place to take care of your Intake Specialists?

As an example, you could execute what I call **Venting Moments** (VM). This will help to support your Intake Specialists and at the same time you're building a stronger team. This helps to retain your team longer and help with their own mental and emotional health. Unconditional venting moments at anytime allowing the Intake Specialist to talk about the call they had. Whether your team is in the office or working from home how can you have venting moments? Some firms have a "safe word" like "apple" that the Intake Specialist can send (*raising their hand*) to the appropriate person that will reach out to them *quickly* and allow them to talk to vent to share the type of call they just had. Everyone needs away to raise their hands to get help unconditionally to be able to take a break.

I remember reading an article once about the 911 call centers and what they do is when an operator needs help needs to vent about a call they just took or a call their still on they "raise their hand" a leader/supervisor removes them from their chair and walks them to a private room that has meditative music, water sounds, no technology, a couch to rest, etc. They also get the option at that moment to vent unconditionally to the leader. I liken the Intake Specialist roles to 911 operators.

You could create what I call “Quiet Rooms” for the Venting Moments for folks that still work at the office. Don’t forget about the “hand raising” example for virtual Intake Specials. Healthcare costs to businesses skyrocket when employees don’t feel well. There are five aspects to health — mental, emotional, physical, social and spiritual. Some businesses give their employees a comfortable, safe place to work, and offer some type of exercise... that’s physical. Before Covid some businesses were opening the work environment to create spaces to collaborate... that’s social. Spiritual is really not in the realm of companies to address so what are we doing about emotional and mental health? Especially when you think of the types of phone calls, prospects and clients your Intake Specialists, Attorneys, Legal Assistants deal with every single day. We’re working our employees to the burnout point. We expect them to produce, produce, produce. And some businesses want them to be “on” 24/7. That does not promote mental and emotional well-being. That is not how to grow your business and it’s not how you will keep insurance costs down, as well as the huge cost of constantly hiring new people. Some of the examples I gave you’ll have to adapt to your work environment those working at the office and those working at home. Be creative start with something remind your Intake Specialist daily to “raise their hand”.

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