

# The organisation and the counselling service provider: a relationship that improves with maturity

**Rachel Weiss** examines the components of a successful working relationship

**A**s a humanistic counsellor, I have spent years developing my relationships skills. But how often do I apply these skills in my role as an employee counselling service provider? In this article I consider the relationship between the organisation and the provider, and the characteristics that can make this a productive and mutually beneficial one.

## Model/field/context

Relationships in workplace counselling are far more complex than the traditional client-counsellor-supervisor-professional body shown in figure 1.

Part of the inherent complexity of workplace counselling relates to the number of stakeholders involved. These stakeholders have an influence in the successful provision, implementation and usage of a counselling service.

**Provider:** the employee counselling service provider, providing face-to-face counselling for employees paid for by their employer.

**Organisation:** which purchases the counselling service from the provider.

**Organisational sponsor:** the person working for the organisation, who liaises with the provider, eg receives reports, agrees contract. This is often a member of HR.

**Client:** an employee of the organisation, who seeks counselling from the provider.

**Counsellor:** who works for the provider and with the client.

**Case manager:** works for the provider, managing counsellors, liaises with organisational sponsor.

**Supervisor:** independent from the provider and the organisation, supervises counsellor's work.

I have developed Claringbull's' model in figure 2 (p16) to include these stakeholders and their interlinked relationships. The thicker lines denote closer relationships, a dashed line denotes a relationship which sometimes exists eg in management referrals, but not self-referrals.

There are several variations on this model such as where the supervisor is internal to the provider, or when there is a separate contract manager within the provider, who liaises with the organisational sponsor.

The client-counsellor relationship receives a lot of attention in the literature, in training courses and in practice. The counsellor has their supervisor and case manager attending to the relationship. The client may have their manager, colleagues and family or friends supporting them.

The relationship between the provider and the

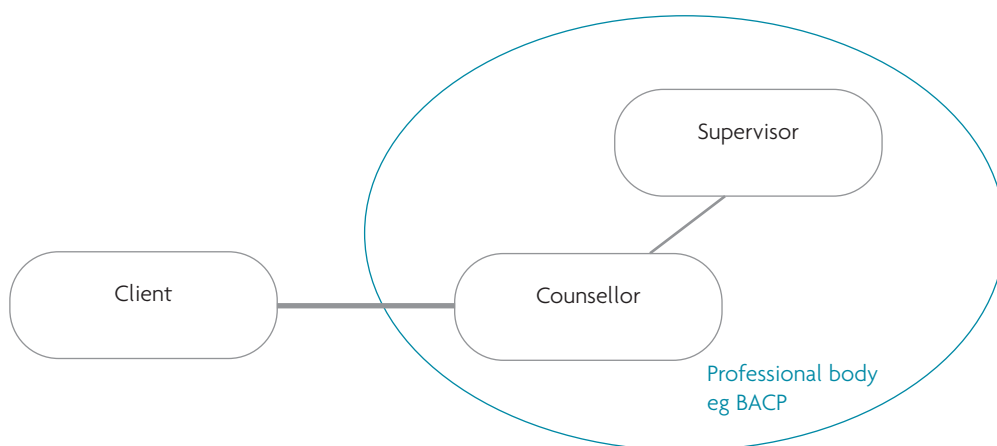


Figure 1. Relationships between professional body, supervisor, counsellor and client in private practice

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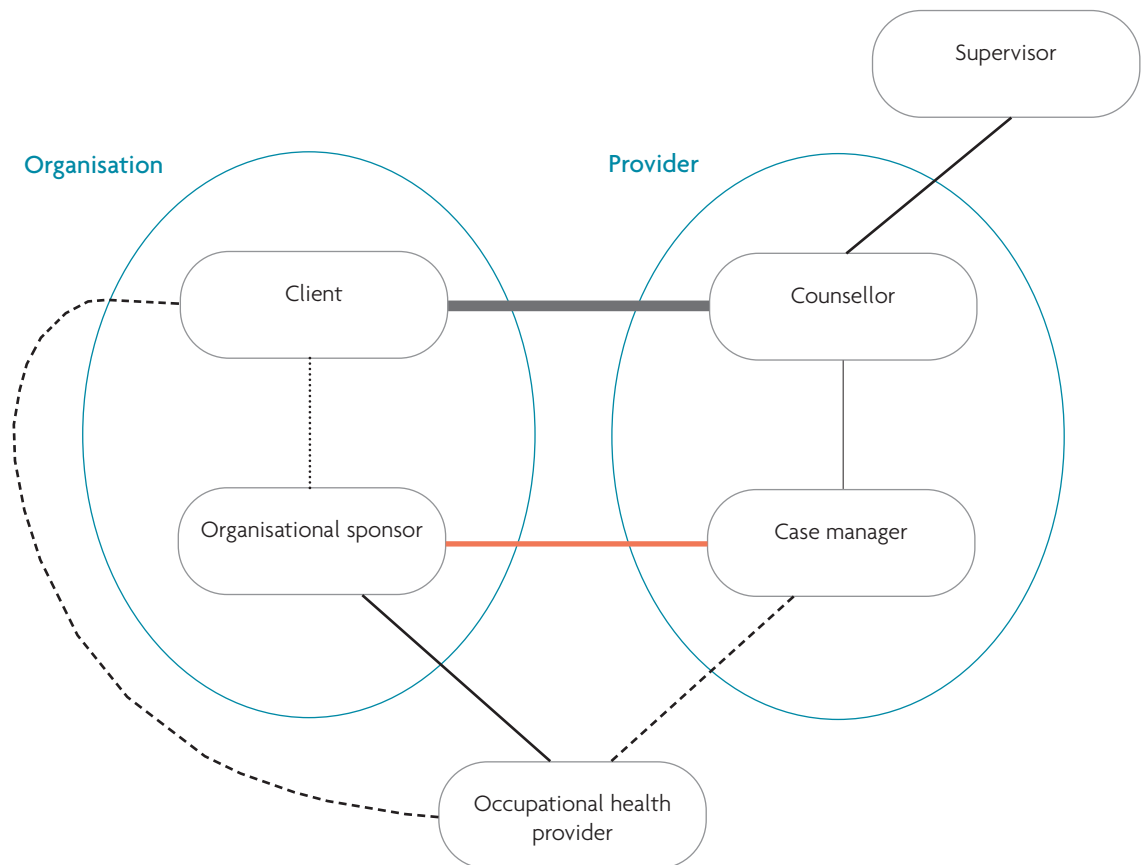


Figure 2. Model of stakeholder relationships involved in workplace counselling

organisation receives less attention. It is personified in the relationship between the case manager and the organisational sponsor. This relationship is at the heart of workplace counselling. Without it, employee counselling becomes ‘first aid’, tackling the symptoms but not the causes of work-based issues, and does not become integrated into the organisation.

### Importance of provider-organisational relationship

As a counsellor I am client centred; as a provider am I customer centred, or do I try to make the customer fit my product, instead of vice versa?

**‘The relationship between the case manager and the organisational sponsor is at the heart of workplace counselling’**

### Product-service continuum and relationship marketing

Providers need to move along Shostack’s<sup>2</sup> product-service continuum to be more service-focused, as shown in figure 3. If we see employee counselling services as a standard product to be sold to as many customers as possible, then we will have little contact with customers post-sales and will not adapt our product to their needs.

If we move further along Shostack’s continuum we introduce more service elements, tailoring to our customers’ needs, keeping in frequent contact ie using relationship marketing rather than transaction marketing<sup>3</sup>. Transaction marketing concentrates on gaining new customers. Relationship marketing concentrates on keeping existing customers (see table 1).

Schwenk<sup>4</sup> stresses the need to ‘create a working relationship with the organisation’. When setting up a workplace counselling contract with an organisation, ‘get to know them, their needs and hopes for this new work, their background and culture, their business ethos and protocols, policies on equal opportunities, complaints procedures, health and safety etc’. Too often much good work



Figure 3. Shostack's product-service continuum

is done at the start of a contract but we can then neglect customers, expecting the contract to automatically renew, while we spend more energy in getting new contracts. It is far more cost-effective to maintain existing customers, than to keep losing them and have to acquire new ones. For the past few years competition has been fierce between workplace counselling providers with some customers switching providers frequently. One way to keep contracts is to build a good relationship with the organisational sponsor and keep following Schwenk's advice throughout the contract, not just at the start.

Key organisational sponsor personnel come and go, and my own organisation, Rowan Consultancy, has often had to start from scratch to build up a new relationship with them. It is not always easy, since they may bring their own attachments to providers from their previous organisation, but this has worked in our favour too, when HR personnel move on and then contact us in their new organisation to invite us to tender for contracts.

**When the customer is not the consumer and the product is intangible!**

The organisational sponsor is the customer, since they pay for the service, but they do not receive the service directly, so they are not the consumer, the client is. Thus it is much harder for the

organisational sponsor to assess the value of the service. If I were selling a tangible product, like a car, then the customer could see it and test it before deciding to buy. They could also easily measure the quality of my product, once they had purchased it, by seeing whether it works, either themselves or by asking the employee who uses it.

So, we have an intangible service, where the customer is not the consumer, in an economic climate where every business expense is being questioned – quite a marketing challenge! I believe it is essential for providers to use relational marketing by building positive, trusting relationships with organisational sponsors.

**How to maintain a productive provider-organisation relationship  
The provider's role**

We need to do more than keep our promises by providing the service as described in the contract: the organisation does not want more employees who need counselling, but fewer of them. So the provider can work with the organisation on prevention rather than cure – identifying ways to reduce the work-based issues that bring employees to counselling.

**Be collaborative** The provider needs to be open to working in partnership with other bodies too.

Transaction marketing	Relationship marketing
Orientation towards a single purchase	Orientation towards repeat sales
Limited direct customer/supplier contact	Close, frequent customer/supplier contact
Focus on product benefits	Focus on value to customer
Emphasis on short-term performance	Emphasis on long-term performance
Limited level of customer service	High level of customer service
Goal of customer satisfaction	Goal of 'delighting the customer'

Table 1. Transaction marketing vs relationship marketing<sup>3</sup>

In our contract with Tayside Police, we liaise directly with their occupational health provider, who assesses employees and recommends counselling when appropriate. This requires a three-way relationship between the organisation sponsor (HR at Tayside Police), the occupational health provider and the employee counselling provider (Rowan). We represent three different professions, and have had to take time to understand each other's complementary viewpoints, language and priorities in order to work together for the good of Tayside Police and their employees.

**Be proactive** We need to help the organisation identify their needs and then show how we can meet these. In one organisation we realised that many clients' problems were caused by the managers' lack of interpersonal skills. We fed this back and the organisation arranged training for their managers.

**Have the best interests of the organisation at heart** There is no point selling them something that is not useful. This is unethical and will also backfire when the customer comes to purchase again, since we are aiming for repeat purchases of different services from the same provider.

**Be helpful** If we are not the best provider, then we can recommend someone who can deliver – it costs nothing. For example, Perth College was having an open day and wanted input on different personality types; this was not something Rowan could provide at the time but we did recommend another provider.

**Be flexible** Let your service flex to meet the organisation's needs instead of expecting the organisation to flex to fit your existing product. For example, if our contract is to provide individual counselling but an employee needs couple counselling, the answer is 'Yes, we can!' It is easy to recruit a couple counsellor, or discover whether our existing counsellors can see couples or young people, for example.

**Be patient** In the early days, I would come out of a meeting disappointed unless I had secured a contract for new work. This was not conducive to building good relations with customers. Now I am more patient and am happy to come out having built more trust and respect between the organisation and Rowan. Sometimes it may take years of simply reporting on employee counselling services and getting to know the organisation before we are invited to provide other services.

Applying counselling ethics to customer relationships is more satisfying and productive!

### Characteristics of the organisational sponsor

'It takes two to tango.' No matter how skilled and open the provider is to collaborative working and furthering the wellbeing of the organisation, the relationship will go nowhere unless the organisation is open to this. For example, a new organisational sponsor in one of Rowan's customer organisations inherited us as the provider. They saw workplace counselling as a benefit offered to employees purely by management referral, and only on compassionate grounds, certainly not in cases of a disciplinary or grievance which were seen as troubles the employees had brought on themselves. In these circumstances, I believe the provider has a role to educate the organisation as to the benefits of employee counselling and the wider role we can play, but only for those who have ears to hear.

In contrast, Rowan has a 10-year relationship with Perth College UHI. Eleven years ago Rowan was a two-counsellor practice, seeing private clients only. The college invited us to provide a self-referral counselling service for their employees. This was an enlightened move, since in those days, although universities provided staff counselling services, very few colleges did so. Despite changes of principal and HR staff, Rowan has maintained a very positive relationship with the college. Some of the organisational characteristics which have enabled this productive relationship are:

**Success** The college is functionally well and is striving to become excellent. This enables it to plan ahead and be open to new ideas, in contrast to organisations who are struggling to survive and can only think of immediate threats and concerns.

**Forward planning** The college has a 10-year strategic plan with a vision that takes it to 2016. It is not just a paper exercise but a live document, which is used to plan new initiatives and as a check that the college is going in the right direction. The

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strategic plan sets out the college's commitment to attract, retain and develop high-quality and creative staff to create a culture of excellence. The college has significantly increased the staff training budgets and introduced coaching. The coaching plan was approved by the senior management team, so that when Rowan started delivering coaching training for managers, this had the full backing of the senior management team (SMT), who all attended the coaching sessions. Without this backing the initiative would have either not got off the ground or would have had a more superficial effect, influencing only those who attended the course. It would also have been a two-month wonder, paying lip service to the coaching approach attended only by those already converted. But due to SMT backing and the organisational sponsor planning ahead, aiming for culture change and sustainability, there is an 18-month training programme reinforced by individual sessions and reflective groups. In other organisations, Rowan has helped to develop proposals with an enthusiastic organisational sponsor who then failed to get backing from senior management, since the proposal did not fit with the organisation's plan.

**Open minded** Perth College UHI does not just view Rowan as a provider of employee counselling. Over the years it has come to value our experience in developing people, and the college has taken time to share its vision with us. The college's open mindedness and willingness to take time for conversation around the college's direction allowed Rowan to say how we could contribute to its growth.

Due to the above characteristics of the college and the organisation sponsor in particular, Rowan has built a productive working relationship. The college has a sustained, planned approach to staff development. It has built on employee counselling and coaching, with coaching training and an employee survey, and complemented this with 360 degree feedback for the SMT. Rowan's coaching and counselling skills enabled us to facilitate the giving of the 360 degree feedback, helping participants to digest the feedback they received and to plan what action they would take as a result.

Susan Bald, director of human resources and organisational development at Perth College UHI explained: 'The college works in partnership with Rowan and involves them at the early stages of planning organisational and staff development programmes. This ensures we are all clear about what we need to achieve. As a result, the coaching

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programme introduced for managers, and being rolled out to staff, has had a positive impact on managers' professional and personal development and on staff engagement.

'The positive working relationship we have with Rowan is built on trust. Staff have confidence in the confidential and professional counselling services provided; managers have trust in the one-to-one coaching sessions with Rowan – they can confidentially discuss work issues with a Rowan coach and will be supported to find solutions to the challenges they face; and Rowan trust the college to be open with them about the challenges ahead as we move to a more coaching approach to people management.'

### The counsellors' contribution

Counsellors have a vital role in shaping the relationships between provider and organisation by giving feedback to the provider. By collating my counsellors' feedback, I obtain a bigger picture of organisational issues and can identify common themes, eg a reluctance for employees to contact HR or to use bullying policies; a need for managers to be trained in handling return to work interviews; a cluster of employees in one particular branch suffering from work-related stress.

This collated information is the added value that we offer the organisation. We are not simply providing counselling for the individuals who access the counselling but can give consultancy. As Schwenk<sup>5</sup> says, 'being able to highlight organisational concerns' at senior practitioner level, leads to workplace counsellors acting as organisational consultants.

### Model applied to schools

Kilgraston is a Scottish independent school where Rowan provides pupil counselling. I find the same model applies as with employee counselling since consumer (pupil) and customer (deputy head) are distinct. Kilgraston had a counsellor who simply came in once a week and saw pupils. There was no contact between school and provider apart



Figure 4. Rowan's core product of employee counselling service with the additional services that we provide in response to customer desire and need. This forms the augmented product

from invoicing. The school approached Rowan seeking a more integrated service, with the head of pastoral care (organisational sponsor) liaising with Rowan's head of counselling and psychotherapy (case manager). We meet once a term to discuss the service usage.

As a result, Rowan has been invited to facilitate class discussions, when a teacher died, and to help train sixth formers to become mentors for younger girls and to provide in-service training for staff. These extra activities help raise the profile of the counselling service and enhance the relationship between the school and Rowan.

### Core product, augmented product

If our aim is to improve employee wellbeing so that employees, and hence the organisation, can be more productive, creative and successful, then we need to think beyond counselling into other areas such as training, mediation, coaching etc and work in partnership with other providers of these services and occupational health, financial advisors, legal advisors etc.

Customers' expectations continually change and increase. I think of Rowan's employee counselling service as our core product with additional features, as shown in figure 4.

### Conclusion

The relationship between the provider of employee counselling services and the organisational sponsor is crucial for contract renewal and successful delivery. The theory of relational marketing is congruent with our counselling ethics and values and uses our existing skills. When we apply relationship marketing to our customer relationships, we build repeat business and more satisfying contact. The core product of employee counselling becomes augmented with complementary services, resulting in a holistic approach to employee wellbeing and organisation development. ■

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