

# COST EFFECTIVE STRESS MANAGEMENT TRAINING

BY GORDON  
F. SHEA

The president and founder of a major restaurant chain burst into the hallway like the human dynamo that he was. Spotting his personnel manager and me walking toward the executive classroom, where I was to begin a training session, he exploded "Damn it, Shea, you've got to teach these people how to relax — they're falling apart around here. Next Tuesday tell me what you can do for me." And the whirlwind took off down the hall yelling at one of his vice presidents. I remember concluding on the spot that the most effective way to get "his people" to relax was for him to take a six month, around-the-world cruise.

However, by Tuesday I was ready for him. Not that I had a program designed (that was to take another three months), but I was ready to discuss the topic closest to his heart — money. "John," I began, "teaching your people to relax can save you money." His eyes lit up, he smiled

and began to relax. Now that I had his full attention, I began to tell him about reports in the business literature on productivity increases that stemmed from teaching employees to use transcendental meditation techniques and other methods of relaxation on the job.

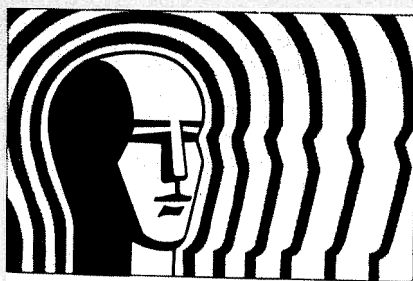
In a few minutes, however, he was getting hyper again — this time with enthusiasm. "Great — how soon can you get a proposal to me?" I promised a proposal on a pilot course in three weeks but warned that it would take longer than that to put together a sound program. "OK, but let's hurry up — we haven't a minute to lose," and he was off down the hall hailing another vice president at the top of his voice. *Whew!* I exclaimed and went off to enjoy a very quiet and relaxing lunch.

What I had discovered in that intervening week was that a number of business firms had investigated various relaxation techniques and assessed the benefits to their organization when a significant number of their employees practiced these techniques. For instance, a study in a New

England bank compared a group practicing transcendental meditation with a group of non-meditators and determined that this method of relaxation boosted office efficiency. They found that the meditators had fewer clerical errors, increased typing output, less absenteeism and lower turnover. Other studies bore out the same types of cost savings. Additionally, there were reports from meditators themselves who reported on their own personal productivity gains.

Meditators in two Northeastern industrial firms reported that they were better able to:

- Focus their attention on their work and concentrate for longer periods.
- Conceptualize about projects they were pursuing.
- Avoid procrastination.
- Develop more creative ideas.
- Concentrate their energies more productively.
- Conserve their energies throughout the day; and
- Avoid being thrown off stride by new problems or adversity.
- Lessen their dependency on



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alcohol, medicinal drugs (such as Valium) and stimulants.

Results such as these were mentioned in publications such as *The New Englander*, *U.S. News and World Report*, *Business Week* and *The New York Times*. I knew that if business people could smell potential profits in stress management techniques that trainers would increasingly be called upon to render service — as they have been.

When I considered getting into the business of teaching people to manage stress I knew three things:

1. My client wanted only training that paid off in dollars at some point in the future — a net profit.

2. That the total cost of the training (including trainees' class time and lost on-the-job time) would be charged against the gains.

3. That there would have to be a positive visible behavior change among the trainees.

The process of course development and design was significantly affected by the reality that stress has medical implications and that an effective stress management program could have substantial health benefits that could even affect medical insurance costs and sick leave ratios. As we researched the program more thoroughly we also began to realize that in untrained hands some of the specific techniques for relaxation could have negative effects on people's health, if care was not taken.

### Pre-Course Research

There were two preliminary steps in course planning:

1. *Literature Search* — Not only did we want to be up-to-date and stay up-to-date, we wanted to be sure we had the most effective techniques available to us. We had a nurse "in training," who possessed research abilities, work at developing a comprehensive bibliography. She abstracted materials from technical and professional articles and books. We also consulted with a medical doctor about many of the points that could affect health. We wanted to make sure our clients got maximum benefits with no risks.<sup>1</sup>

2. *Practical Research* — From

the literature search it became apparent that all of the really effective approaches to a person managing stress in their lives involves some form of exercise or activity which produced a measurable state of relaxation. We found six basic methods recommended by Herbert Benson<sup>2</sup> and others. This group of techniques became a major consideration when assessing the cost relationship involved in training. These techniques were:

1. Biofeedback
2. Transcendental meditation or other meditation techniques
3. Progressive relaxation (use of imagery)
4. Yoga/Zen
5. Self-hypnosis (sometimes with hypnosis and suggested deep relaxation)
6. Physical exercise — which ranges from simple, in-place pressure-release exercise to deep breathing routines

A careful study of each of these methods for producing a relaxed state was necessary to insure not only that all factors were considered in the course design but also that the training experience itself was thorough. Some people find they respond best to a specific technique and therefore our training had to at least demonstrate the potential in each method. However, it was here that I discovered a primary cost relationship between the methods to be used.

I decided to take extended training in each of the six methods so that I could develop a first-hand appraisal. Several of the techniques had positive side effects which could justify their use without regard to relaxation, such as the physical exercise involved in yoga. But from a management point of view there were certain inescapable time investments that management might or might not wish to make.

Though all of the techniques can be demonstrated and experienced by course participants in a two or three-day program, it may be necessary to focus on the most effective techniques if a high level of skill is to be developed in one or more of the approaches. This high skill training is necessary if a



stress management program is to be anything beyond a "nice trip" . . . in short, to avoid the type of training that is thrilling but truly unproductive in the long run. If an organization is to get their *money's worth* we need to consider four cost factors:

- *Some techniques take more "training time" than others to reach the end result of producing true deep relaxation when needed.* For example, yoga tends to be complex and many hours are needed in the training sessions to become truly proficient. Consequently such training tends to be long-term and costly if the organization is paying for it on company time.

- *Some methods take more long-term "post course" participant practice to develop the desired skills than do others.* Transcendental meditation, for example, while producing beneficial results early, normally takes several months before a meditator can really reach a deep state of relaxation. This long-term requirement

may lead some trainees to drop their practice sessions, thus cancelling out the organization's and the employee's investment. By contrast, biofeedback skills can be developed in hours or days at the most.

- *Some methods produce a state of deep relaxation faster and more efficiently than other methods.* Transcendental meditation, while effective, also usually requires two meditation sessions a day of 20 minutes each. Through auto (self) hypnosis, by contrast, a trainee can reach a state of deep relaxation and come out of it refreshed and with his or her batteries recharged in three minutes. Since some organizations are permitting the practice of stress relieving efforts on the job, the relative efficiency of the methods becomes important.

- *Some of the techniques produce beneficial side effects which need to be added into the organizational cost analysis.* Some of these peripheral benefits are of direct value to the organization

and should be evaluated when assessing the value of the course, though some are hard to quantify. Other "side effects" benefit the course participant directly and provide an added incentive for them to continue using the relaxation techniques.

Reduced incidence in heart attack, fewer days of employee illness, more productively directed work efforts are some of the documented organizational benefits. It is even possible to measure the level of stress and tension in an organization before and after widespread training in stress management has occurred. Related dollar savings can also be identified.

To the employee, the incentives for continued practice can include reduced tension at home (because the individual is no longer a stress carrier), better management of personal time (less procrastination) and better feelings toward the job and co-workers (trainees often report a higher level of work group cooperation). Personally, I can attest to three peripheral benefits I derived from learning self-hypnosis during my pre-course research: (1) The ability to numb my jaw so that novacain is not needed when going to the dentist; (2) The loss of 50 unneeded pounds without dieting or conscious effort; and (3) The ability to stop migraine headaches before they fully develop.

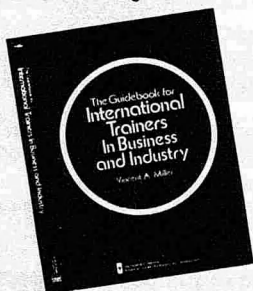
### Comparative Research

Staying abreast of the state of the art involves finding out what is currently being done in stress management training.

We not only bought most of the commercially available tape-recorded programs but attended 14 stress management programs in various geographic locations while developing our program. This comparative research is often frowned upon by trainers but it is nothing different than a prospective restaurateur observing and studying how McDonald's or Howard Johnson's conduct their business. Unless proprietary material is purloined or plagiarized no true harm is done.

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ness in public or offers their services to the public should expect that others will be affected by what they see. It is similar to an aspiring painter studying the works of others in order to create a truly original work. By learning from others, we believe our program is truly unique and artful — as well as cost effective.

In a cost effective sense, however, comparative research is a way of skimming over ground that has already been covered and

seeing what works and why it works. The same thing is accomplished in part through the literature search.

The primary benefit derived from looking at other people's work was the design of a very tight, cost effective training package. Thus, we could offer a greater gain in productivity results at the least investment in employee training time and direct course costs.

We had monitored programs ranging in length from an hour and

a half to five days (including a follow-up session). The quality ranged from dreadful (participants walked out because of boredom) to exciting, but few offered the hope of real long-term results.

### Selection — Decisions on Educational Content

Of the available body of knowledge, much of it quite technical and medically oriented, the choice of material depends on the level of understanding required in order to ensure that people do indeed reduce harmful stress in their work situation (as well as in their personal lives).

We found that participants needed to know and understand the following types of information:

- The nature and meanings of stress (including a few simple definitions) and the realization that stress can be helpful as well as harmful.
- The physiological mechanism of stress.
- The health implications of failure to deal effectively with stress.
- There are ways to use stress constructively.
- The nature of "stress carriers" and "stress generators" and how to deal with them.
- Ways in which various people cope with stress in the working environment.
- Ways in which we can protect ourselves from psychosomatic diseases and other harmful effects of stress.

The above types of knowledge (as opposed to the skills mentioned earlier) constitute about all that the average manager or employee needs to absorb in a three-day program where the primary focus is on skill development. These items provide the rationale for the other activities. This material covers about three hours of lecturettes scattered over a three-day course. Unfortunately I've seen many stress management programs where this type of "head" stuff is the whole program — which can be very interesting but very ineffective when considering results. We provided handout materials on this phase so that participants could share their learning with family and friends and thereby reinforce

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"The most critical yet variable factors in a cost effective stress management program are the deep relaxation techniques taught to course participants."

their learning experience.

#### Group Sharing

Each participant needed an opportunity to:

a. Get in touch with the way they personally experience harmful stress — physiologically and psychologically.

b. Be able to distinguish between harmful and helpful stress and to visualize situations which overlap.

c. Identify the types of events or stressors that impact negatively on them personally.

d. Become consciously aware of their own stress allergies or vulnerabilities.

e. Enlarge their range of coping mechanisms.

These goals were met by a series of very short (10-15 minute) self-awareness exercises, and small group sharing and "list enlarge-

ment" work (another 10 minutes) for each activity. These exercises were interspersed with the educational lecturettes for a lively program with full participant involvement.

This type of format helped us reach another cost objective. By interspersing lecture with personal exercises and small group sharing, we found we could handle groups of 25 to 30 with no loss in skill development (when it came to practicing relaxation techniques). I've seen stress management programs which contained almost solely educational content handle larger crowds but those numbers preclude much skill development, for one instructor can only interact with and monitor a limited number of people. The use of more than one instructor or the use of technical aides increases the course costs but does allow for more partici-

pants to be in a class.

We also needed to provide participants with information on how to tackle factors of environmentally induced stress. It was necessary to establish within each participant the realization that:

1. Much stress is a result of negative thinking and that the development of new habits and controlling negative moods could substantially reduce stress.

2. The feeling of powerlessness is a prime generator of stress and that through the use of assertive (rather than aggressive) behavior, changes in a person's environment can be made.

3. Even when the job is stressful we can change ourselves although we may not be able to change the job environment.

4. That a variety of planning and management techniques (which they may already know) such as work simplification, methods analysis and time management can be used to reduce on-the-job stress and frustration. Provide a bibliography of useful texts that cover these related subjects and show in class several relationships between these efforts to clear our environment and the reduction of stress.

5. Much stress is in our head and we are sometimes doing things that generate stress in ourselves and carry it to others.

We provided self-analysis exercises as homework and in class we worked on some practical ways to reduce job induced stress. Participants received guided instruction on how to develop a personalized stress management plan which includes a 30-day projected scheme for continuing these efforts.

In some sessions, participants formed into teams of four or five people and were charged with the responsibility of meeting for a half hour each week to share information on how they are progressing on their plan and to solve problems in implementing their personal plans. In some programs, the class met for half a day, about a month

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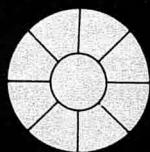
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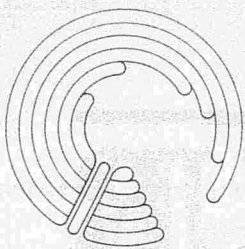
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after the class, in order to reinforce learning and to provide individual help as required.

These supportive techniques provide a well-rounded, comprehensive program which encouraged participants to continue the practices in the future. Participants were encouraged to share their learning with their families, if they feel comfortable doing so.

These participant follow-up meetings and the consulting help ensure that the organization achieves long-term payoffs for its investment.

## Selection of Relaxation Techniques

The most critical yet variable factors in a cost effective stress management program are the deep relaxation techniques taught to course participants. The choice of methods and the art with which these skills are transferred will determine whether or not there will be long-term behavior change, improved personal on-the-job performance, and a positive impact on the work environment.

Because some people respond positively to a particular technique because it suits their personal life style and self-image, such as yoga, all six relaxation techniques (bio-feedback, meditation, progressive relaxation, yoga/zen, auto-hypnosis or exercises) need to be explored so that individuals can choose their own development plan — even though it may not produce useful depths of relaxation for a long time. All of the methods work and are productive to some degree, eventually. However, as a result of our own research and the training we have done we find we are able to rank the methods according to their:

1. Teachability in the classroom;
2. The development of the skills of deep relaxation over a short period of time;
3. The personal (and possibly organizational) investment in time required to achieve a state of deep relaxation on any given day;
4. The long-term productivity payoffs; and
5. The likelihood of continued utilization of the techniques.<sup>3</sup>



The rank order, from the most cost effective to the least effective, based on the five preceding criteria appear to be:

1. Self-hypnosis (coupled with hypnosis and suggested deep relaxation);
2. Progressive relaxation (very quick and effective but the level of relaxation may not be as deep);
3. Transcendental meditation or other meditative techniques;
4. Biofeedback — or autogenic training;
5. Yoga/Zen;
6. Physical exercise.<sup>4</sup>

The above list may come as a surprise to some people and they may be concerned that self-hypnosis is rated as the most cost effective method. Attitudes on hypnosis are changing rapidly since the days when it was associated with exploitive stage hypnotists and the occult. Hypnosis, particularly when self-induced, merely allows our autonomic nervous system and our creative unconscious to rise to the surface — a perfectly natural phenomena that virtually everyone has experienced often in life without realizing it.

The word hypnosis means sleep, though as Dr. Benson indicates, it is not true sleep. The body responses indicate a waking rather than a sleeping state. The autonomic nervous system is that part of our brain which allows us to breathe and our heart to keep beating without conscious effort. Hypnosis merely allows that part of us to take over — and this system is oriented to protecting us automatically.

Hypnosis has been accepted by the American Medical Association as a legitimate therapeutic technique since 1956. Much of the mythology of the past is disappearing and it is increasingly being used in solving a variety of therapeutic problems and in attaining deep relaxation quickly and effectively. Self-hypnosis gives the participant control over the situation and no dangers are inherent in this approach that would not be present in any situation where you close your eyes. The most that can happen is that if you are physically

tired you may pass from a state of hypnosis into deep natural sleep — only to awaken when you are rested.

However, since some stress management programs use hypnosis for suggested deep relaxation (because of its speed) it is important to have a competent professional conduct such sessions, and that all of the suggestions given be positive, in wording and format. For our part, we focused on the very safe techniques of progressive relaxation, auto-hypnosis (self-hypnosis) and some aspects of autogenic training (body control), all of which are controlled by the participant.

A few weeks after our first course for the restaurant chain I stopped in to see John at his request. He was quietly persuing a report. I had never seen him so calm.

"You know," he said, "calculating benefits on this type of training is kind of hard, but I figure I laid out about \$100 cash and \$200 in classroom time per employee for each three-day course.

"Here at headquarters, I can see and feel the benefits every day. But in the units (restaurants) where we've trained the managers and regular staff (not all waiters or waitresses were trained), we've had an average four percent drop in operating costs and a six percent gain in net revenues — and our gross is starting to climb markedly without any other discernible factors entering into the equation. My only regret is that I didn't have this training a long time ago."

#### REFERENCES

1. For example, some of the techniques involved physical exercise and when these are recommended it is important that such exercise be preceded by an adequate physical evaluation by a medical doctor. Our program was designed to avoid that problem. On the other hand medical writers indicated the need for effective stress management by pointing out that the incidence of high blood pressure, stroke, heart attack, asthma, ulcers, an overactive thyroid gland and even rheumatoid arthritis is increased by stress.
2. *The Relaxation Response* by Herbert Benson, M.D. (with Miriam Klipper).

William Morrow & Company, Inc., New York, 1976.

3. The number of positive health related side effects are somewhat related to personal needs and the trainee's physical condition. The health related factors are not included in the following rating though they can be best assessed by the individual at the time of training. For example, many of us could probably use more exercise for its own sake and any relaxation benefits we achieve could very well be the side effect.
4. A special note: We teach some very short tension exercises which produce quick muscle relaxation but the depth of overall relaxation is usually not great.

Gordon F. Shea serves as president of PRIME Systems Co., a training and consulting firm in Beltsville, MD. He has been a practicing supervisor, manager and executive for over 20 years in government, private industry and for a foundation. He has consulted with over 400 private firms, government agencies and academic institutions including Ford Motor Co., C&P Telephone Co., Hercules Powder Co. and the Indiana and West Virginia Highway Commission.

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