



Discover the benefits of workplace mental health training for managers

FINANCIAL SERVICES COMPANY



Developing and implementing a successful workplace mental health strategy

Every organization is unique and requires a tailored approach to workplace mental health that addresses their specific needs. Regardless of industry or company size, employee well-being is essential to creating a healthy workplace environment.

There are many effective actions that organizations can take to promote mental health in the workplace. We recommend you read this success story of an employer who developed and improved their mental health strategy. You can learn from their experience and apply similar actions to your own workplaces.



Essential components of a healthy organization

A mentally healthy workforce is key to a company's success. In this case study, you'll learn more tactics for success to improve workplace mental health.

Here are 3 critical components of organizational success:

- **Leadership commitment** to changing workplace culture
- **Organizational assessment** to better understand your needs and risks.
- **Tailored mental health strategy**

The case study below showcases what's possible. It highlights Sun Life's commitment to bringing our tested best practices to you in supporting the health of your employees.



Case study – Financial services company

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The employer

A Canadian financial services company with about 2,000 employees in Western Canada.



The opportunity

The company had a solid wellness culture. This included a focus on the three pillars of health: physical, mental and financial. But this wellness focus had not shielded the company from the broader societal trend of increasing mental health problems.

The company's short-term disability claims relating to mental health had doubled in two short years. During that same period, 42% of long-term disability claims were also mental health-related.

Alarmed by this trend, they engaged our Integrated Health Solutions (IHS) team. They wanted to take action fast, building on their already strong culture of wellness and support.

Shortly after engaging the Sun Life team, the pandemic struck and the company decided to act without delay.



The approach

The company's culture emphasized providing managers with tools to be supportive and empathetic people leaders. And one of the most important tools identified was mental health training. As the pandemic began to unfold, providing managers with this training became even more critical.

Together with the Sun Life team, the company sprang into action to implement a three-phase manager mental health training program.





The actions

With the pandemic, and most employees working from home, the role of managers had significantly shifted. Oversight and support were now virtual. Managers needed to understand the unique mental health challenges that employees could be facing given the new circumstances. The training curriculum reflected this new reality.

The three-phase training format was delivered virtually by the IHS team between April and June 2020:

- **Phase 1: Online e-learning manager mental health training modules.** Modules were available 24/7 and provided an overview of foundational mental health topics. Managers had to complete all modules before participating in Phase 2.
- **Phase 2: Mental health live webinars.** Sun Life's Director of Mental Health, a registered psychologist, presented two live webinars:
 - *Webinar #1: Managing Absence and Promoting Mental Wellness in the Workplace.* This webinar built on the information provided in the Sun Life e-learning modules.
 - *Webinar #2: Promoting a Healthy Workplace: Putting the National Standard for a Psychologically Healthy and Safe Workplace into Practice.* This webinar explored the 13 Psychological Risk Factors of the National Standard of Canada for Psychological Health and Safety in the Workplace.
- **Phase 3: Q & A with Sun Life's Director of Mental Health.** This was an open forum. Managers submitted questions in advance that were answered during the webinar by the Director of Mental Health. Questions were also taken and answered through online chat in real time during the session.

Senior leadership participated in all webinars, but managers did not hesitate to share their comments and concerns. This culture of openness was apparent prior to COVID-19 and had not shifted, even in a virtual work environment.



The results

It's too early to measure possible outcomes of the program on metrics like disability claims. However, the actions taken have made a significant impact on the organization.

More than 140 managers participated in the training – far exceeding the company's expectations. That is 140 people leaders across the organization with new skills to recognize struggling employees and support them.

The success of the training program has given the company momentum to introduce more positive change. They have since taken several additional steps to ensure that employees who need help have access to available resources. These include:

- Providing free online therapy sessions for six months to all employees and their families.
- Increasing the annual psychological coverage by \$500 for a three-month period. The aim is to encourage those who need help to get it sooner than later.
- Providing a personal video message of support to all employees from the senior HR leader. This message encouraged employees to break down mental health stigmas and use the resources available to seek help.
- Holding online employee sessions to highlight the mental health resources available to them.
- Adding the online e-learning manager mental health training modules in their Learning Management System. This enables managers to access the content at any time.
- Continuing to encourage managers to review the online e-learning manager mental health training modules.

In partnership with Sun Life, the company will evaluate the results of its initiatives. This includes monitoring disability claims, benefit utilization, participation in mental health initiatives and employee engagement scores.



A free resource – Sun Life manager online mental health training

The company incorporated our free online manager mental health training series into their customized program. These five **online manager training videos** are available to all employers 24/7 at no cost.

Through self-teaching video modules, your people leaders learn to:

- Identify potential mental health issues in your workplace
- Communicate effectively
- Help build a healthy environment
- Identify and address the stigma related to mental health issues.



Higher mental health practitioner benefit maximums – breaking down the cost barrier to treatment

Many benefit plans cap their coverage for mental health practitioners at \$500 per year. Often this is a combined maximum – shared with other services like chiropractic care. This often falls far short of funding the number of sessions required for effective treatment.

It's clear that cost can be a barrier to treatment, as demonstrated by a recent **Canadian Psychological Association (CPA)** survey. Sixty-six percent of respondents said a lack of benefits plan coverage is a barrier to seeking treatment.¹

Increasingly, employers are viewing higher coverage maximums as an investment, not a cost. By eliminating the financial barrier to treatment, they are focusing on reducing absences, lowering disability rates and returning those on disability leave to health and work faster.

The CPA recommends a standalone annual coverage maximum of between \$3,500 to \$4,000. This amount provides coverage for 15-20 sessions. This is the number of sessions required to achieve a therapeutic outcome for people suffering from depression or anxiety.

¹ 2020 Nanos poll conducted on behalf of the Canadian Psychological Association (CPA): <https://cpa.ca/strong-majority-of-canadians-want-improved-access-to-psychologists/>





Take your next step towards improving workplace mental health. You don't have to do it alone!

The pandemic has made having a mental health strategy that much more critical. This case study shows how you can make a difference and improve workplace mental health with the right approach.

Get started with our free Mental Health Strategy Toolkit.



Use the Free tool kit now

It was created based on our:

- years of experience working with Clients to create healthier workplaces
- extensive testing within our own organization to find solutions that work

It's a great resource to help organizations get started, as well as to guide employers already on their journey.

Need more support? We're here to help.

- Connect with your Sun Life Group Benefits representative to discuss which **Integrated Health Solutions (IHS)** may be right for you.
- Or you can **Learn more** about these supports and others available to you.

This report provides you with general information only. It doesn't provide you with employment, legal, health, or financial advice. Consult with the appropriate professional advisor to meet your organization's needs.

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