Implications for Team Focused Stress Management Training

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Abstract: Stress management training typically emphasizes strategies to help individuals alleviate sources of stress, and to reduce, or compensate for, their experience of stress induced symptoms. This paper addresses the incorporation of the intact work unit as a focal target for stress management training. A pilot test of such training is reported, highlighting expected requirements for team focused stress management, above and beyond programs directed at individuals.

The literature of stress in the workplace is abundant, both from the perspective of theory and research and from practical management of the problem (Ivancevich, Matteson, Freedman & Phillips, 1990). Efforts to define stress and measure the phenomena (Beehr and Franz, 1987; Watson, Pennebaker, & Folger, 1987; Kasl, 1990; Landy, 1990), to identify moderating variables of the stress-strain relationship, as well as target stress research to specific occupations (Cooper and Payne, 1980) are also widely reported. Matteson and Ivancevich (1987) identify a broad array of associations and organizations involved in stress management or research.

Burke (1987) notes a wide gap between the work of stress researchers and practitioners (who may be thought of, respectively, as the producers and the consumers of stress research findings). As illustration, Burke notes that practitioners may have little awareness of research findings, and researchers may seldom study the topic beyond the individual level. Given the increasing focus on teams in the workplace (Katzenbach and Smith, 1993), we were surprised at the paucity of studies that explicitly focus on stress management of intact teams.

One well-researched dimension of the stress-strain relationship is that of social support (Cobb, 1976; Cohen and Wills, 1985; House, 1980). Social support can derive from supervisor, co-worker, or spouse; supervisory support is reported as having the most direct effect of these three (Marshall, 1990). This is not surprising owing to the supervisor's role in work assignment, capability to modify rules and policies to needs of employee, and his/her control over tangible and intangible reinforcements (e.g., incentives, feedback, punishment).

Generalizability of these findings is probably restricted to settings where the supervisor actually has control over aspects of employee's work experience. Kerr and Jermier's (1978) work on substitutes for leadership would lead one to expect that just as an organization's structure and policies can negate a supervisor's capability to function effectively as a leader, so too can it negate a supervisor's capability to successfully impact the stress experienced by an employee. By extension, the workgroup may have the same capabilities as the supervisor to help mollify stressors that impact any single member of the group, particularly in semi-autonomous (or otherwise "empowered") workgroups.

We believe that the intact team (coworkers and supervisor) can be an effective target for stress management training and research. Moreover, the practice of organizational team building and that of family therapy would suggest that the intact unit is not only a requirement for lasting change, but that the experience of any individual can be better understood in light of experiences that pervade the pattern of relationships in the system (Ettin et al, 1987; Whitney and Rose, 1990).

Background

The design of stress management training for an intact team grew out of a consulting assignment. The initial client was a team of 15 technical operations personnel (including the manager, senior and junior technicians, and support staff). They administer and maintain various office technologies (e.g., telephones, data networks, teleconferencing services) that are critical to their own customers' productive capacity. Although the entire group could convene for on-site meetings, they were reluc-

tant to attend off-site training seminars for any extended period of time. The client expressed interest in a workshop on stress management that could be customized, delivered on-site and not require an entire day away from the work at any one time.

Significant components of the planning and design for this workshop therefore included:

*   Training an intact group, including the manager.
*   Separate sessions on stress awareness and stress management, including practice between sessions.
*   Specific focus on stress occurring in *this particular work environment*, related to the nature of the job and task requirements, and to customer service.
*   Transfer of training, both at individual and group levels of commitment and action.

Although the workshop was initially designed for a single team, early response of participants led to the same workshop being delivered shortly after to three other teams (in other locations) having the same organizational function. The data on participant reactions are presented together throughout this paper.

Description Of The Training Program

Transfer of Training as a Core Design Feature

"Transfer of training" refers to the carryover from the classroom back to the workplace (Goldstein, 1986). Although clearly essential, many courses are not designed with this as a primary focus. Training participants might spend some time generating goals or action plans for themselves to use, or work on an individual exercise asking them to relate class material to their immediate work situation. By and large, however, this task of training application is typically left up to the individual trainee.

Conditions for successful transfer of training are well documented in the literature of individual and organizational change (Laker, 1990). Ironically, some of the conditions most likely to support transfer of training from the classroom to the job are least likely to occur when indi-

viduals attend training apart from their work groups. Among these conditions are:

*   Support and involvement of the participants' managers.
*   Use of materials and examples that closely resemble situations encountered on the job.
*   Willing participation among attendees. At a minimum, no sanctions for not attending.
*   Participation by a "critical mass" of group members, who can then reinforce and support application of new skills and principles after training.

To the extent that each of these issues can be explicitly designed into a workshop, the greater the impact that can be expected following training.

Design Principles

The following principles were emphasized in the design of this training:

*   *Distributed learning.* Training was conducted in two half-day sessions, with approximately one week separating the first and second sessions. The distributed learning design permitted practice between sessions, as well as an opportunity to reflect on and discuss the application of the skills.
*   *Incremental involvement and ownership of stress management.* Using the two sessions as building blocks, the first session focused on awareness of stressors and stressor induced strain. The second session focused on stress management techniques and strategies, as well as direct application of learning back into the ongoing work setting (see Table 1). Both sessions emphasized personal ownership and team control over responses to stressors.
*   *Increasing level of awareness of stress management.* Also based on the two session building block concept, the focus of the sessions shifted from individual and interpersonal experience, to include the collective group experience of stress and stress management. Individual experience highlighted awareness of personal symptoms of stress, cognitive activity and physical tension. Interpersonal experience highlighted awareness of signs of stress in others, and communication

with others about stress experiences and stress management. The awareness and management of stress across the group *as an intact unit* can be viewed as a form of team development, providing all group members with a common framework to identify, articulate and manage complex events affecting many people at one time.

* *Group vs. individual level experience.* By virtue of having the intact team participate, many of the individually focused activities could be discussed at a group level as well. For example the group could review the range of scores on various instruments (Ivancevich and Ganster (1987), for example, include the Type A behavior scale, the Holmes and Rahe life events scale, and a checklist of stress symptoms).

Training Content Unique to Team-Based Activity

Based on the theory and objectives that led to the design of this training, there were several ways in which the training was uniquely focused on the team:

* *Identification of signs of stress among coworkers and customers.* A checklist self-rating of stress symptoms was followed by asking participants to identify signs of stress in family members, coworkers and customers. Coworker and customer signs were boarded and discussed. Having not discussed this in such an open manner before, the participants showed considerable surprise at how well they identified each others' signs of strain and the wide array of signs of customer strain. Signs of stress among customers were further divided into face-to-face

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Table 1

Stress: Awareness and Managment

Outline of Workshop

Session 1: Stress Awareness	*Sample Content*
Workshop overview and guidelines for participation	Expectations, Ground rules
What is stress	Definition, Evolution of work on stress
Symptoms within yourself	Checklist
Signs of stress in other people	Checklist, Discussion
Sources of stress	Holmes & Rahe scale, Type A scale
Self awareness: tension, self talk	Physical activiy, cognitive monitoring
Personal stress management strategies	Scenario writing, Self-awareness
Monitoring your awareness of stress	Diaries, Discussion, Coaching

Session 2: Stress Management	*Sample Content*
The experience of monitoring your own stress	Discussion, Blocks to practice
Relaxation exercises: progressive muscle relaxation	Exercises
Your mental set: positive self talk, cognitive reframing	Four stage perspective
Managing time-related stress	Lecture, Practice tips
Interpersonal relationships and stress management	Active listening, nonverbal behavior
Customer service and stress management	Structured coaching
Applying what you have learned: individual and group commitments	Contracting

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signs and those provided via telephone contacts.

- *Focus on customers' reactions to their own stress.* Participants compiled collective lists of ways that individual, coworker and customer stress can affect the quality of services delivered. In addition, they generated observations of how customers experiencing stress might work with this department. Finally, they identified individual and team focused strategies to manage customers' needs under these circumstances.
- *Time management as a team related set of events.* Time management, often included in stress management training, typically provides a list of activities that can be purposely followed and other activities that can be avoided to help individuals reduce stress based on limited time availability and ineffective management of time. In addition to this type of information, the team focused training included discussion of how the actions of individuals affect the time management capabilities of coworkers (e.g., the impact of not having back-up staff, the ripple effect of sick and personal days affecting others).
- *Gradual progression toward peer coaching.* Early in the workshop, participants were asked to talk with peers about stressful experiences at work. At various points during the workshop, they repeated the same activity but were provided with more structure for their discussions. They would choose a critical incident, identify symptoms of stress, antecedents and consequences of the experience of stress, and eventually strategies for managing a specific stress or source of stress. Similarly, in the role of listener, participants were asked to obtain more detailed descriptions of stress and stressful situations, and, eventually, to probe their coworkers for alternative strategies to manage the stress and the specific situation (e.g., to alter, avoid or better accept the particular stressor).

Process Observations Of The Workshop

During the course of the workshop, the trainers noted several events relevant to the training of intact teams:

- The group manager was an initiator, an advocate and a participant in the training. As part of the workshop preparation, we met with the supervisor to discuss how their behavior and participation would set the tone for the degree of openness that others would display during the exercises and discussion. This manager's receptiveness and willingness to disclose personal experience of stress within this organization was key to establishing an open climate within the workshop. For example, after identifying their own symptoms of stress, the group was asked to now identify various "signs" of stress displayed by the supervisor. The supervisor validated several observations, noting some surprise and reacting with good humor at the accuracy of the group. This activity promoted more open exchange of what group members themselves experience and how their own signs of stress are perceived by others.
- The second session included discussion and, to some extent, negotiation among the group members about acceptable stress management actions for individuals and the group as a whole outside of the training class. As part of this activity, the group supervisor participated in the discussion and indicated which suggestions the group could immediately implement, which ones were not realistic or appropriate to this work setting, and which ones could be attempted on a limited or trial basis. For example, the supervisor was very supportive of group members taking time each work day to practice stress management techniques. However, when staff are in their offices they can not expect to avoid interruptions, especially when customers drop by. The supervisor offered to make the training room available (when not in use) as a place for group members to obtain privacy.
- The distributed learning design permitted stress awareness tasks to be assigned between sessions. As might be expected, some members of the group practiced exercises; however, many did not. This was briefly discussed at the beginning of the second session. Rather than only emphasize the importance of practice, the *lack* of outside practice was used as a catalyst for discussion of what kept group members from doing

exercises (that only a week before they had committed to doing). The intent was to permit the group to identify real conditions that facilitate or inhibit effective transfer of training.

- As one of the last segments of the workshop, the conditions facilitating or inhibiting outside practice (identified at the start of the second session) were again reviewed, but explicitly to provide a realistic assessment of the transfer problem that would follow closure of the workshop. Each person identified what they felt would be necessary for the training to "take" (or transfer) back in the day-to-day work setting. This was followed by a discussion by the entire group about conditions that would support or block transfer after the workshop was completed. The goal was to begin to openly develop a climate for stress management within the group (e.g., acceptable behavior in front of customers as well as acceptable behavior within the group).

Follow-up information, in the form of participants' recommendations for making stress management a reality on the job were sent to each attendee approximately one week after the workshop, serving as a personal and group reminder about effective stress management.

Workshop Feedback

As a check on transfer of training, workshop participants were told to expect two specific follow-up inquiries:

- Several managers in the larger organization (a director, a department head and a supervisor) were each asked to wait about four weeks after the workshop and speak to several participants (in person or via telephone) about the impact and value of the workshop.
- A short survey was sent to participants two months after the workshop asking what they were doing differently, what differences they noticed among their coworkers, and whether their group had changed.

Initial Workshop Reactions

Initial reactions consisted of written comments provided at the end of he training and

verbal comments provided several weeks after the training was completed. Several participants requested that a recording be made of the progressive muscle relaxation exercise, and copies were made available to all group members. The supervisor offered to have a cassette tape recorder available for any group member who wanted to spend 15 minutes of the workday going through this exercise. Other reactions were:

- Generally positive responses to attending the workshop as a group.
- The workshop was viewed to be informative: identifying sources and symptoms of stress, providing specific techniques for responding to stress.
- Recognition of the importance of being aware of and able to identify stress in others.
- Interest in having this workshop made available to other operations groups within the larger organizational unit.

As a result of the initial workshop, three other groups providing parallel services requested the same workshop. The initial reactions of these additional groups are provided below. Two month follow-up data is combined and presented in the section that follows.

Initial workshop reactions of the additional three teams were similar to those of the first team:

- The workshop was informative, raising awareness about stress and stress management opportunities.
- Participation as a team and open discussion were viewed positively.
- Provided an opportunity to recognize one's own stress and that of coworkers.
- Provided practical methods to apply to the management of stress.

Also common to the initial feedback was the request for more workshops, for attendance by other members of the larger organization, and a desire to apply stress management principles both personally and in support of coworkers.

Two Month Follow-Up

In all, four teams attended the stress management workshop: 50 members of the same

organization including their immediate supervision. Two-month follow-up data was obtained from 29 participants. The reactions of these individuals ranged from self-reports of being extremely effective applying the material and managing stress, to self-reports that there were no changes at all. The comments received indicate greater effectiveness at being aware of self-induced stress, applying deep breathing techniques, talking with co-workers, and responding to time-related stress. Most significant were comments that members of groups were talking with coworkers about the presence of stress, and about each others' symptoms and signs. Other examples given of successful application include:

- *Little annoyances of the day...traffic, waiting in lines, etc.*
- *General mental reaction to stress...by being more aware of negative health effects, I now stay calmer and try to handle stress rather than let it handle me.*
- *Stress of dealing with different types of personalities, particularly when they clash with your own.*
- *Coworker confrontation.*
- *Managing interruptions by staying with one job until it's finished.*

Less effective application of the workshop was reported in the areas of stress due to work overload, pressure from customers, and personal life stress. For some people the difficulty in application was the stress of working with their coworkers. Sample comments reflecting less successful application of stress management techniques include:

- *I received this form over a week ago and just got to it now.*
- *When different things happen all at once.*
- *Time management isn't really reasonable in our business....In the heat of battle we have to react real time.*
- *Customers who won't accept what they are hearing if it's not what they want to hear.*

In several cases, the type of stress that someone indicated as more successfully managed *was the same* as the stress they were less successful at managing. Examples include time management, managing workload, customer

stress. This suggests partial success after two months of attempting to apply stress management, rather than a dichotomy of types of stress which are more or less amenable to change. One group supervisor, when asked about the degree of application within the group, noted that major changes hadn't occurred, but there was some impact:*"Mostly we joke about stress in our group meetings, but at least we're acknowledging it now."*

Facilitators and Inhibitors of Transfer

As part of the two month follow-up, training participants were also asked what helps them apply stress management training and what limits application.

What facilitates transfer?

For some people the answer is that the experience of stress and strain serves as a cue that helps them apply the training. For example, *"When I'm all worked up and walking fast, I remember the breathing exercises."* Support of management also appeared as a key facilitator of effective application of stress management principles. A few people noted how their coworkers helped in the application of stress management. Typical of those who did were the following comments:

- *Sometimes people don't realize when they are demanding a lot of you. It helps to speak up and tell them you are feeling stressed.*
- *Being able to share frustration and feelings with coworkers. They need not agree with how I feel, but just knowing they try to understand my position helps.*

What limits transfer?

Factors reported as inhibiting effective application of stress management principles were the overall workload (precluding any opportunity to try alternative behaviors), insufficient personnel (in part accounting for the workload and a lack of time for practicing stress management), and not enough support from management (presumably with respect to the two previous problems). A few participants indicated that the limit to application was primarily due to their own lack of a personal commitment to apply stress management

principles. Finally, one comment illustrates the dynamics affecting practice of stress management after the workshop:

> Like most workshops, people appear very committed while attending, but tend to drift away from the commitment when back to day-to-day routines. In addition, I feel management must also buy into changing behaviors to help eliminate some of the stress they pass down to their employees. I do not see evidence of this in management's behavior.

Discussion

The design of the overall project was not intended as a research study, and would be considered pre-experimental at best: there were no pre-test measures of stress and strain, no control group, and reaction data were primarily self-report. Our intent, therefore, is not to make claims for any particular degree of effectiveness for this particular training program, but rather to highlight several implications for team focused stress management training that might be incorporated into future research studies.

Review of the various reactions participants had during and immediately after the workshop, and two months later, indicate a number of themes:

- Most people liked attending the training with their coworkers and supervisors.
- Participants were able to understand (and perhaps discuss for the first time) how the stress of one individual related to the experience and behavior of coworkers and the group manager.
- Incorporation of the customer service relationship as a component of stress management added a new dimension to the topic even for those who had attended more traditional stress management seminars.
- Post-workshop application of stress management techniques was more of an individual activity rather than a group activity, and related as much to personal non-work applications as organizational applications.
- Those people who noted limitations in applying stress management techniques, identified the chief factors to be workload,

time to practice new techniques, and the perception of limited management support to apply stress management.

The training design should have produced high transfer, not just at an individual level, but also in the form of collaborative approaches to the application of stress management. From the follow-up interviews it was clear that this happened to a limited extent. Interaction among coworkers as a vehicle for stress management may be more difficult to achieve than individual application of stress management techniques. Why did the team not have a more pronounced impact on transfer of training? Given the various steps taken to design for transfer, what else would have had to occur for greater transfer to take place?

The self-report data provided by participants show limited recognition of team support as a key to stress management. More often supervision (also perceived as moderating the workload) was viewed as a primary determinant of transfer. Their *lack of explicit support* was identified as limiting application of stress management principles.

In reality, each of the supervisors made some effort to support application of stress management after the workshop. One supervisor attempted to hold a group discussion at a staff meeting following the workshop and three made relaxation tapes available to their staff. One went so far as to tell staff about his own experience using the relaxation tape, and suggested appropriate places to use the tape without interruption. However, given the generally heavy workload and crisis management nature of these work groups, even limited support by management may have been interpreted by staff as a lack of support.

It is important to recognize that these operations groups are hierarchical in design and performance. Supervisors are key determinants of work assignments and performance appraisal. Even though coworker collaboration is essential within these teams, team oriented results would have been more likely in more empowered groups such as semi-autonomous and self-managed teams.

How Can Supervisors Facilitate Transfer of Training for Intact Teams?

When intact teams are hierarchically managed, as were those of this project, the key may be to more thoroughly contract with managers around their role in the transfer of training. In these cases, we believe that a separate but related intervention may be required to help the manager know what specifically to do to support transfer of training as well as the likely times that training will be more difficult to sustain. Some examples of this side component to the larger workshop might be:

- Self-assessment by the manager (prior to the workshop) of how he or she might contribute to and alleviate the stress groups members experience.
- Expansion, validation or negation of the manager's self-assessment via feedback from group members during the workshop.
- More explicit contracting during the workshop (or shortly after) around what the manager wants to do to help manage stress within the group (e.g., reduction of role conflict/ambiguity, improvement of work conditions and control over task demands, and attention to interpersonal relationships).
- A semi-structured list of questions the manager can have and use to probe staff applications of stress management. This can then be used by the manager informally on an individual basis or as part of regular staff meetings.

Thus, even for team focused training, the role of the supervisor may still be the key for successful transfer of the workshop. This is consistent with the research of Ford, Quinones, Sego and Sorra (1991), showing that supervisory expectations of subordinates' future performance was correlated with the subordinates' opportunity to perform the newly trained procedures. It is also consistent with Goldstein's (1991) discussion of how managers can contribute to a climate for positive transfer of training. In hindsight, getting supervisors to modify their behavior during the workshop is important, but it may be even more important for them to modify their post-workshop behavior if they are to effectively facilitate change with the group.

Another option for enhancing transfer of training would be to include a "relapse" training module (Marx, 1982; Noe, Sears and Fullenkamp, 1990). Relapse training concerns awareness of how trainees feel when they do not effectively use new skills, anticipating situations where successful application is less likely, and developing strategies to increase probability of transfer to these situations. This would be particularly useful after participants have had some experience with the specific activities associated with stress management training. Here also the supervisor can actively facilitate transfer by recognizing the possible need for relapse training.

Stress management, as an intervention, may also open the door to deeper issues (e.g., health, substance abuse, family issues) that need to be addressed, but are beyond the supervisor's capability to deal with effectively. Under these circumstances, the role of the supervisor would be to refer individuals to an internal employee assistance program or to an appropriate resource outside the company.

Implications for Team Focused Stress Management Training

Our experience suggests several additional implications for those who pursue team focused stress management training:

- First, during the workshop establish realistic expectations for participant experience during the period following training. This includes the likelihood of partial successes and relapse to former habits. The danger of unrealistic (often inflated) expectations is that participants will quickly become discouraged by less than perfect success.
- Plan for follow-up sessions. This is important to sustain early benefits and initial motivation. It is also an opportunity to assess how the context of the team may be constraining the effectiveness of stress management.
- Sustained, explicit support of the team manager is critical. If necessary this should be treated as a parallel intervention to the workshop.
- It may be helpful for the members of the intact team to establish learning partners

within the team. Dyads and triads can represent a step between the individual and the full team approach. This may be necessary for some team members to have frequent conversations about their stress management efforts. These learning partners can also set specific targets for practicing stress management and collectively share their successes, problems and strategies with the larger group.

Considerations for Evaluation of Team Focused Stress Management Training

The data obtained in this consultation project lacks the rigor required of formal research and evaluation. Future efforts to study and implement team focused stress management training should anticipate attending to the following questions which can be designed into the evaluation criteria:

- Did the team members believe they could successfully apply stress management concepts on a daily basis? Ford et al. (1991) note that individuals higher in self-efficacy are more likely to try out newly trained skills, especially regarding more difficult tasks. This finding may also hold for the experience of the intact team.
- Did stress management principles generalize beyond individual and interpersonal behaviors to encompass the group as a whole?
- Did the participants attempt to generalize their new knowledge to stress relating to their service vendors and/or customers?
- Did a climate for stress awareness and management develop within the group? Specifically, do members disclose their own experience of strain to other members? Do they comment about signs they observe in each other? Do they consult with each other on perceived stress-strain linkages or review alternative strategies for management of specific stressful events?
- To what extent does the supervisor (or the semi-autonomous group) support maintenance of stress management practices? Are specific resources provided? Are group members reinforced for efforts to manage stress?

Conclusion

Stress management, as a technique to improve the general health and well-being of individuals in the workplace, has been viewed primarily from three general perspectives.

The first of these is the individual level, whereby the experience of stress leads to cognitive, behavioral and physiological symptoms of strain. A second perspective is occupational, whereby different categories and types of jobs give rise to particular levels and experiences of stress. Members of an occupation are exposed to similar conditions and experience similar types of strain. A third perspective is that of organizational stress, whereby the characteristics of work design and the role of management impact individuals' experience of stress. Our approach of training intact teams draws from all three perspectives. Among the benefits of this approach are the opportunities to integrate other themes relevant to daily worklife such as employee empowerment and customer service. It also has the advantage of reaching out to group members and managers to treat stress as something within their collective control and worthy of open discussion. Finally, by focusing on the capacity of the team to self-manage stress we better recognize the interactions within the team and between team members and the customers/ suppliers with whom they routinely interact.

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