breakthrough

JOB DESCRIPTION

# Support-Call Captain

**The Support-Call Captain needs** strong organizational, teaching, and listening skills because this person will instruct and coach the team regarding the participant support process.

**As soon as enrollment begins, the support-call captain will**:

- Manage the support-call process,
- Oversee the accurate handling of support-related information, and
- Handle any follow-up calls that may be needed due to red flags or special needs.

**The purpose of support calls is to:**

- Prepare participants for the training.
- Allow the team to become informed about participants for the purpose of supporting them.
- Encourage communication through which both the participant and the team gain clarity and insight.
- Support participants in getting more clear about their reasons for attending the training—allowing them to fully participate and create the greatest value for themselves and others.

**Team members will help make support calls**. If the Breakthrough Training has a large number of participants, the support-call captain, with the help of the sponsor, may need to enroll other graduates to help make calls. Any graduate who volunteers will need to be grounded into the support-call process by the support-call captain. Because of the volume of work involved in their job, the support-call captain can choose one or two people at the first team meeting to serve as support assistants.

**As support-call captain, you represent the heart and soul of the Breakthrough Training**. You and the team are the first to welcome participants and prepare them for the rich experiences ahead. Your role is be to ensure that all participants are supported in a timely and gracious manner.

Because your job is completed once the training begins, you may be given other jobs to do during the training.

## Before The Breakthrough Training

### Before the training, the support-call captain will:

- Prepare all paperwork and materials needed for the team to complete the support calls. All materials are available on your team page website. Ask your sponsor or team captain for the link to your team page.
- Ground the team in how to make support calls (discuss with team captain to determine at which team meeting this grounding will take place).
- Manage the support-call process.
- Make sure that participant files (including all support-call forms) are in order and given to the sponsor at the conclusion of Breakthrough Training. Files may be stored and transferred electronically.

## During The Breakthrough Training

### During the training, the support-call captain and team will:

- Resolve any questions that arise relating to participant support calls
- Take on other team jobs as directed by the team captain.

# The Support Process

## Step 1: Registration Confirmed

When a participant initially registers for the Breakthrough Training, the Sponsor, Team Captain, Admin Captain, and Support-Call Captain automatically receive an email with the participant's registration form. Store this document, but do not start the support-call process until payment is confirmed.

Participants may receive their support-call at any time **after** they have completed the **full registration process** and they are sent their registration **welcome email** by the administration (admin) captain. ***Ask the admin captain to copy you on all welcome emails*** so you know when a participant is fully registered and ready to be contacted.

As participants register, set up a system to store electronic files on each participant. For each participant, you will need to store the following files:

- Registration form
- Completed support-call form

*Please note that no one is allowed to participate in the training unless both forms are complete and stored.*

**TIP**: To save registration forms or support-call forms electronically, most computers will allow you to "print" the emailed form as a PDF. Another option is to save the email using the RTF format.

## STEP 2: Assign the Support Call

Once you have received a copy of the participant's welcome email from the Admin Captain, you can forward a copy of the participant's registration form to a member of your **support-call team** with the following instructions:

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Hi CALLER'S NAME,

Attached is the registration form for (PARTICIPANT'S NAME). Within the next 48 hours, please reach out and schedule this support call and email me with the date and time that the call is scheduled to take place.

You can find all of the following resources on our team page: (PASTE LINK HERE).

- Online Support-Call Form (with Script)
- Support-Call Form (PDF)
- Support-Call Script (PDF)
- Red Flag Definitions and Protocol (PDF)

Once you complete the call and the online support-call form, I will automatically receive the participant's support-call form. As a safety measure, please call or email me once the call is complete to confirm.

Thank you so much for your service!

YOUR NAME

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**NOTE**: For information about the team page and how to access it, see the ***Team Page*** section of this document under ***Grounding the Team***.

## Step 3: Record Support-Call Progress

Once you have assigned the support call, go to your **team page** and click on the **registration grid** link. This form is shared and updated by several members of the core team as registrations occur. Some of the information for each participant may already be entered by the team captain or the admin captain.

On the registration grid, make sure each of the following is entered for each participant:

***These first five items should already be filled in by the admin captain.***

- Last Name
- First Name
- Registration Form (Click the drop-down arrow in the field and select "YES".)
- Amount paid by the participant (Enter a number, the balance due field will automatically update.)
- Date the welcome email was sent out. (Format: mm/dd/yyyy)

***The remaining items will be filled in by the support-call captain as calls are assigned, scheduled, and completed.***

- Support-call caller (Click the drop-down arrow and select the person assigned to make the call. See note below about how to get names to appear in the drop-down list.)
- Date the call was assigned to the caller. (Format: mm/dd/yyyy)
- Date the call is scheduled to occur. The caller should send you this information as soon as the date is set. (Format: mm/dd/yyyy)
- Once you receive the support-call form email, click on the drop-down arrow under "Caller confirmed completion with CC Captain" and select "YES."
- Once you have the form and have stored it electronically, click the drop-down arrow under "Support-Call Form" and select "YES."
- Read through the support-call form to see if any Red Flags or special needs are indicated. Click the drop-down arrow and select "YES" or "NO" as appropriate. If "YES," follow-up with the caller and address any issues. Instructions are outlined in the "Red Flag" section of this document. You may add a note under "Notes" to keep track of any issues.

***The admin captain will fill in the final column under "Final OK Sent."***

Once the support-call process is complete, **notify the admin captain** so a "you're all set and ready to attend the training" email can go out to the participant.

> *To add support caller names to the registration grid, click on the "Lists" tab at the bottom of the grid. In column B, replace "Caller 1" through "Caller 5" with the names of your call team. You may continue to add caller names below "Caller 5" if you have a larger call team. Return to the registration grid by clicking on the "Registration" tab at the bottom of the page.*

# Ground the Team

The support-call captain will ground (instruct) the team in the basic principles of generous listening and how to set-up and make the support calls before any calls are made.

## Getting Help

If needed, you may speak with the **sponsor** and/or **team coach** in advance of that team grounding in order to get clear on how to best support your team in making support calls and to answer any questions you might have.

## The Team Page

Before grounding the team, go to your team's resource website page, more commonly called "The Team Page**.**" You can get the link to your team page from your sponsor, team captain, or derive it by using the information below.

**Your team page contains all the resources the team needs for the enrollment and support processes.**

Your **team-page link** will be:

**Link Format**: https://liaministries.com/**training**-**year**-**month**-**first day**/

**Specific Example**: https://liaministries.com/**breakthrough**-**2021**-**06**-**03**/

> *In the example above, the URL would link to the team page for the Breakthrough Training that starts on June 3, 2021. Note that the month and first day will always be two digits; there are dashes between the training name, the year, the month, and the first day of the training; and all the letters used are lower case.*

Once you visit your team page the first time, **bookmark** it for easy access in the future.

## Support-Call Resources

On the team page, you will see the headings "Support Calls" and "Support-Call Forms." Under Support Calls there is a short reminder about the calls and information to help the team set expectations for their participants. Under Support-Call Forms, you will see links to the four resources listed below.

You should become fully familiar with the online form and download and print enough copies of the PDF forms to share with each team member during the support-call grounding.

- **Online Support-Call Form** – This is the online version of the form that has the support-call script embedded in the form. Team members can fill out and submit this form from their computers. Completed forms will automatically be sent to the support-call captain.
- **Support-Call Form** (PDF) – This is the paper-and-pencil version of the above form.
- **Support-Call Script** (PDF) – This is the script team members can use as a guide during the actual support call.
- **Red Flag Definitions and Protocol** (PDF) – This document clarifies what a red flag is and what to do if the caller believes the participant should receive a red flag.

## Team Grounding Outline

Share the following information during your team grounding.

### Your Purpose

Make two requests of all the support callers:

1. Seek to be **fully present** for the participant with whom you are speaking so that you are fully engaged, listening generously, and able to ask questions that will catalyze the beginning of their Breakthrough Training process.

2. **Don't share** with others who you called or any other aspect of the support call. These calls are confidential. The only people privy to the information shared during these calls are the support-call captain, core-team members, sponsor, team coach, or trainer—and then only as needed according to the red-flag process.

Your goal during the call is to **help the participant get clear about the three areas in their life where they'd like to see something new**. Be curious and ask gentle, probing questions. Get specific about who, what, how, or what something would look like if they had it.

Take a stand for the participant and help them be prepared for the rigor of the Breakthrough Training by listening generously and inquiring into what matters to them.

Risk vulnerability by sharing yourself, as appropriate, in order to help open up possibilities the participant may not currently see.

## Setting Up The Call

Once you receive a participant's registration form, give them a quick call to arrange a time for the actual call.

This initial call introduces you to the participant and alerts them about the call's importance and timing.

Once this initial phone call is completed, the support-call captain should be notified as to when the support call will be made.

This initial call could be the participant's first contact with The Flourishing Life and the Breakthrough Training. So be courteous and fully present with the participant by fully explaining the purpose of the support call—that it is a time dedicated to them to help get them clear about what they want—so they will be able to fully participate and create the most value through their participation.

Request that the participant set aside at least an hour of time—apart from distractions—and to prepare for the call by thinking about their reasons for attending the training.

## During the Call

1. **Welcome the participant to the training**. Let the participant know you are excited about the opportunity they have before them and that you are standing with them to reach for the unprecedented future that they say matters to them. This is an opportunity for you to let the participant know that you are there to support them and spur them on to the life they long for.

2. Ask what the participant has **heard about the Breakthrough Training**. You may share from your experience, but keep it brief and spoiler free.

3. **Discuss their reasons for attending the Breakthrough Training**. This is a dedicated block of time in which your sole purpose is to explore with them why they are coming to Discovery Training and what's important to them. Ask questions that will help the participant get clear about the new life they want.

   *Support Call Captain: At the grounding, be prepared to demonstrate the question/answer process that takes place during a Support Call. You may want to discuss call techniques with your team coach and/or sponsor before the grounding starts so that you can best instruct the team members in how to connect with the participants in a meaningful way.*

4. **Review the three specific ways the participant wants to change their Breakthrough on the people around them** from their registration form. Ask specific questions about each one. Be genuinely curious. Be an eager listener who wants to get to know the participant and discover what matters most to them.

5. **Encourage them to participate 100%** throughout the three days. Make sure the participant is clear that they will have opportunities to jump in and participate, and that they will get the most out of the process by being willing to speak up, take risks, and be fully present.

6. Review the questions the participant was asked on their **questionnaire**. Depending on their answers, additional topics of discussion may appear in the online form. Stress the following points with the call team:

   - It is **NEVER** the support caller's job to tell a participant that they cannot attend the Breakthrough Training. Support calls are not screenings and in the end the participant or the trainer are the only people authorized to make that decision.

   - Participants who have undergone psychological counseling or therapy within the past twelve months are **NOT** required to obtain a physician's release. They are asked to take a copy of the release to their counselor and discuss the advisability of taking the training at this time.

   - Participants who answer "yes" to the questions regarding (1) hospitalization for psychiatric care or for a mental disorder, (2) being prescribed any anti-psychotic, antidepressant, or anti-anxiety medications, (3) have medical conditions that may be aggravated by or inhibit participation, **MUST** obtain a ***signed physician's release form*** to attend the Breakthrough Training.

   - If anti-psychotic, antidepressant, or anti-anxiety medication has been taken ***within the last year***, the prescribing doctor must sign the release. Otherwise, any physician familiar with the participant's case will do. If within the last year **multiple medications** are being taken from multiple prescribing physicians, a physician's release must be obtained from each prescribing doctor.

   - The embedded script in the support-call form addresses each of these points clearly.

   - If the physician's release is an issue for a participant, remind them that a doctor's signature is required, not necessarily an office visit, however, the forms must be signed and returned or they cannot participate.

7. **Review the practical logistics** involved in taking the training, including location, what to wear, etc.

Review the **Support-Call Script**, the **Online Support-Call Form**, and the paper **Support-Call Form** with the team and answer any questions.

**TIP**: Some callers prefer to use a paper copy of the form during the call and then type their answers into the online form once the call is complete.

## Red Flags

During a support call, callers may notice that the participant is exhibiting red-flag behavior, such as. . .

- **The participant is dazed, confused, or resistant to participating**.

  Examples of this are statements that he or she "only wants to observe" or "doesn't want to participate"; an inability to focus or answer the questions; a seeming inability to carry on a conversation. If this happens during the phone call, seek to open up possibilities and help the participant identify why he or she wants to go to training.

- **The participant is angry, feels pushed, or has changed his or her mind about attending**.

  In this case the participant will expresses anger or the feeling of being pushed into the training. If this happens, it is not the caller's job to enroll them to stay in the training. Ask the participant what interested him/her in the training in the first place. If they are open to talking, build value for the participant by inquiring about what the training could mean for them personally. If they are willing to continue with the support call, the caller should seek to be sensitive to where the participant is. If they continue to express anger, end the call politely and refer it to the support-call captain.

- **The participant wants to leave in the middle of the training**.

  If a participant says, "I might leave in the middle of the training if I don't like it" or "I'm going, but I have to leave for a meeting," the caller should explain that the training is a three-day commitment and encourage him or her to attend another training if they cannot commit to the full three days. They should ask the participant what his/her concerns are and address any fears.

- **The participant indicates that they have had violent episodes in their past**.

  Complete the call, but mark the participant as a red flag and alert the support-call captain. The support-call captain will alert the sponsor who will call the participant and discuss the situation.

If the team member feels that they cannot adequately support the participant, they should politely alert the participant that they don't feel they are adequately supporting them and that they will have the support-call captain follow up with them.

**Be aware of the following The Flourishing Life policies**. A break in one or more of these policies should also be considered a red flag.

**Age Limits**: A person must be 18 years of age or over at the time of the training to participate in the Breakthrough Training. (Remind callers that it's not their job to say "You can't attend." Simply mark the participant as a red flag.)

**Substance Abuse** (drugs and alcohol): In order to participate in the Breakthrough Training, participants who have struggled with addiction to drugs or alcohol must be clean and sober (zero use) for six months prior to attending the training. (Again, remind callers that it's not their job to say "You can't attend." Simply mark the participant as a red flag.)

# If there is a REG FLAG:

**Immediately alert the support-call captain of the situation.** ***The support-call captain will take over from here*** and follow up with the sponsor and the person who enrolled the participant to determine a course of action based on the steps outlined in the Red Flag Definitions and Protocol document on the team page.

**Review the** Red Flag Definitions and Protocol **document and answer any questions**. This sheet may be found on your team page under support-call forms. Again, note that if there is a red flag, the caller's responsibility is to alert the support-call captain and let the captain handle the situation from there.

## Important Reminders

- The call should take at least an hour.
- Be clear and concise in your communication.
- Ask questions to get the participant talking about what they long for.
- Be on time when you call, reflecting excellence as a support for the participant.
- When a team member receives a registration form, he or she should make an initial call to the participant within 48 hours, arranging a time for the full support call.
- Ideally, the support call should occur no later than four to five days after receiving a registration form.
- The team member should alert the support-call captain (email, call, text) when they have scheduled a call with a participant and the date on which it will take place.
- The team member should alert the support-call captain (email, call, text) when the call is complete and the online form submitted.