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The case for emotional intelligence in case management

Emotional Intelligence: Quantitative Proof

BY VERGIL METTS, PH.D.

Maybe you're like me: a skeptic at heart, not easily swayed by new ideas. As intriguing and intuitive as something may sound, as compelling as its anecdotal evidence, I need the hard data to fully take the bait.

So after reading the first two stories in this series on management — the first discussing organizational health (February/March 2008) and the second investigating emotional intelligence (April/May 2008) — the more bottom-line-oriented of you may still be wondering, "OK, so what?" That is the question I will answer in this article. Actually, I will answer four questions:

- Can emotional intelligence (EI) be measured?
- Can training improve EI?
- Does EI correlate to actual job performance?
- Finally, how does EI relate, practically, to case management?

WHAT IS EMOTIONAL INTELLIGENCE?

Do you ever marvel at a master? A natural born leader who, through good times and bad, gets people to line up and follow? You've seen them everywhere, from your daughter's kindergarten teacher, who somehow creates order from chaos, to win-everywhere football coaches and game-changing CEOs and politicians. Chances are that these people possess high EI (along with a good dose of IQ, I suspect).

In essence, EI is the ability to perceive and express emotion accurately, to effectively use emotion to facilitate thought, to understand emotions, and to manage emotion in a way that supports optimum performance. It is a whole lot more than being a likeable sort.

EI is an innate yet improvable ability to balance emotion with cognition to best serve the situation at hand. It is a set of skills and abilities that goes well beyond technical competence and, in the end, defines the difference between a competent technician and a true master.

EI occupies a place at the intersection of thinking and emotion (see Figure 1), where the two combine in various ways to drive quite different behaviors. It is why and how some with comparable skills "on paper" can achieve much more than others.

MEASURING & IMPROVING EI

One way to study EI is to measure behaviors associated with its four branches, as identified by researchers Jack Mayer and Peter Salovey. These four branches are:

- **Perceiving Emotion**
- **Using Emotions to Facilitate Thought**
- **Understanding Emotion**
- **Managing Emotion**

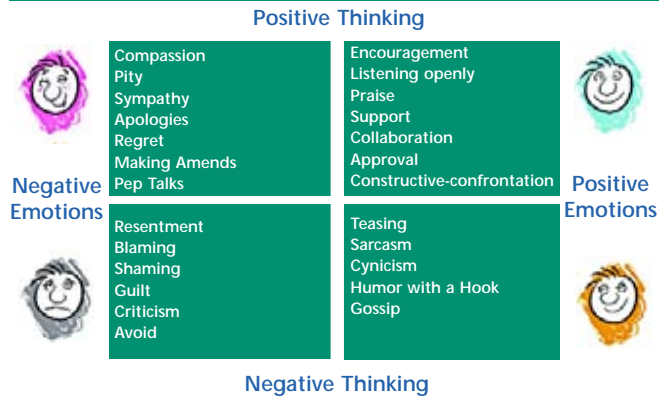
Their model posits emotions as an important part of cognitive functioning, with the resulting EI an innate ability that people possess.

My firm studied if and how certain kinds of training could improve EI. To measure the EI-related abilities of workforce managers, we surveyed each subject's direct

CONSUMER FOCUS

Figure 1

Intersection of Thinking and Emotion



supervisor to gauge these abilities before and after each individual's EI training. Our subjects came from a range of businesses, from health care and electrical manufacturing to food production and marketing.

Our questions did not hover in putative or immaterial terrain. Quite the opposite. We probed tangible areas like communicative ability, motivational skills and problem solving.

Every subject received EI training through one of my firm's workshops — an intensive, three-day program that begins with an EI diagnostic, provides tools to enhance emotionally intelligent behavior, and administers follow-up exercises to monitor and continue to improve EI.

The data showed a landslide victory, returning nearly universal, statistically significant differences in pre- and post-training ratings. Post-training ratings were consistently higher than their pre-training counterparts (see Figure 2 on page 23).

Under the "Perceiving Emotion" branch, for example, we probed areas like how easily subjects recognized when a co-worker is angry or upset, or how well subjects were able to communicate feelings with others.

Under the "Using Emotion to Facilitate Thought" branch, we found similarly positive and significant differences in areas like how adeptly subjects altered their moods to fit different situations, and how well they understood how their moods affect decision-making. The "Understanding Emotion" and "Managing Emotion" branches followed a similar pattern.



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Anecdotal comments rounded out the picture. Supervisors consistently reported subjects' enhanced sensitivity to others' emotions; improvements in communicative skills; and newfound abilities to defuse tension.

MEASURING EI AND JOB PERFORMANCE

There is a significant body of research emerging that links high EI with superior job performance and customer satisfaction. The literature includes studies of diverse vocations like claims adjusters, customer service representatives and police officers.

Claims adjusters with superior EI garnered higher customer satisfaction ratings. Customer service representatives with higher EI ranked better in job performance, and, interestingly, in their own job satisfaction. Police officers with strong EI stayed with their jobs longer and felt more satisfied in their jobs.

More important research awaits in areas like relating EI scores to performance improvement, and in particular regard to the aspects of EI self-awareness. Some is underway, looking specifically at which aspects of EI are most important to job performance, which types of jobs can benefit most from EI, and the role EI plays in leadership.

In order to understand the full range of benefits of EI in the workplace, researchers are now moving out of the laboratory and into the workplace to document "real world" benefits and to dispel the myth that EI explains everything.

HOW EI MATTERS TO CASE MANAGEMENT

Now time for the biggest *so what* of them all: How does EI relate to case management, and how can it be deployed practically to optimize performance?

For one, EI is critical to high-touch professions like case management, where a large part of the work is emotional and where skills like listening and communication can influence outcomes.

It is not unusual for acute health concerns to make even-keeled people frazzled. I can understand this firsthand. When my father-in-law suffered a stroke aboard a cruise ship, I became a consumer of your and your allied health colleagues' services — and captive to some intense emotions. Through the experience, I began to understand the taut tightrope you walk every day.

I learned that EI impacted every interaction, in terms of both the quality of medical care given my father-in-law, and on his loved ones' ability to receive information and make decisions.

It's easy to see how each Mayer-Salovey branch comes into play for case managers and other health care agents. Take "Perceiving Emotion," which counts one's awareness of others' subtle emotional cues among its yardsticks. This can be a hard thing to do when meeting people for the first time, especially people who may be under new and intense stress, as is often a case manager's challenge. But consider how even incremental

Figure 2

Pre-training and Post-training ratings (2 – 6 months after training); 2-tailed t test

SCALE/ITEM	Pre	Post	t	p
Perceiving Emotion	3.75	4.38	-5.78	.000
Expresses emotion appropriately in the workplace	4.13	4.61	-2.62	.014
Effectively lets others know when he/she is upset	3.48	4.19	-4.57	.000
Is aware of subtle emotional cues from others	3.61	4.32	-4.57	.000
Actively and accurately judges other people's emotions	3.55	4.00	-1.92	.065
Easily recognizes when a co-worker is angry or upset	4.10	4.68	-4.81	.000
Effectively communicates feelings to others	3.61	4.48	-6.02	.000
Using Emotion to Facilitate Thought	3.60	4.26	-5.35	.000
Effectively helps others get emotionally "up" for the task at hand	3.68	4.35	-3.72	.001
Understands how his/her mood affects decision making and adjusts to compensate	3.48	4.10	-4.05	.000
Changes his/her mood to fit the situation	3.77	4.42	-4.50	.000
Integrates emotions and other data to improve the effectiveness of his/herself and others	3.48	4.19	-4.79	.000
Understanding Emotion	3.44	4.11	-5.47	.000
Identifies the causes when his/her mood changes	3.29	4.03	-4.63	.000
Accurately identifies the reasons behind mood changes of self and others	3.42	3.94	-2.63	.013
Analyzes emotional reactions effectively and accurately	3.71	4.32	-3.87	.001
Solves emotional problems well	3.35	4.16	-6.86	.000
Managing Emotion	3.66	4.41	-7.54	.000
Avoids behavior that heightens negative emotional reactions	3.90	4.48	-4.01	.000
Deals with emotional reaction before attempting to resolve a problem	3.29	4.32	-5.85	.000
Is good at helping co-workers calm down when they are upset	3.81	4.39	-3.65	.001
Manages emotions effectively in the face of conflict	3.58	4.45	-6.02	.000
Employs behaviors likely to dissipate adverse emotional reactions	3.74	4.45	-4.57	.000
Communicates with others in a way that minimizes negative emotional reactions	3.61	4.35	-5.67	.000


Source: Metts, V. and Daus, C. "Enhancing Emotional Efficacy Within the Framework of the Four-Branch Model of Emotional Intelligence." Presentation to the Annual Convention of the Society for Industrial and Organizational Psychology, 2006

improvement in this skill can make a big difference.

Under "Using Emotion to Facilitate Thought" resides our aptitude to adjust mood based on the situation at hand. I'm certain I took cues from the moods of those treating my father-in-law, which in turn affected my ability to process information they needed to give. As our firm's study proved, training can move the needle.

"Understanding Emotion's" subsets include analyzing emotional reactions effectively and accurately. We saw direct cause and effect, in how certain staff's adeptness at understanding my father-in-law's occasional outbursts of frustration led to expert handling, while others' failure propagated yet more of the same.

It all comes together under the "Managing Emotion" branch, home to actions like communicating in ways that minimize negative

emotional reactions. This data serves as a reminder of EI's power to polish even a master's repertoire. 

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