Take Care of You and Your Client Like an Emergency Responder

Laurie M. Martin, EPC, CTS

It brings me great joy to be here with you. I’ve coined the term “trauma momma.” I’ve worn this title for many years in my career. It sounds funny, yet I’ve been told sometimes when things get tough, it is nice to talk to a “momma” now and then.

This session is intended as a guide. I will provide the learning from personal experience and from others. When it comes to helping yourself or someone else with a crisis, each person is unique; therefore, there is no one recipe for helping. My hope is that you will walk away with a new awareness of what a crisis is for your client, for you to become more comfortable with the uncomfortable, and to gain new knowledge that you can draw from for the rest of your life as needed.

I grew up on a farm in rural Ontario, Canada. I can remember my father’s words when he said, “Laurie, it is one thing when crisis hits the barn; it is another when it hits the house!” So true, especially when loved ones are involved.

My first life crisis wasn’t a death or an illness. My *life interruption*, as I call it, was when my then husband told me he was a pedophile. When I was asked to describe my story, the words came naturally from deep inside me: “It is like a forest that has been burned to the ground and there isn’t a blade of green grass to be found anywhere.” My life changed in that moment, and there was no going back.

When my story was turned into artwork, the first drawing that I was shown surprised me. There was a light beam shining down through the trees onto a pink rose coming up from the burnt ground.

I asked, “Why is there a pink rose in the middle of the burnt forest?” The artist replied, “Laurie, it is the rose of hope.” Hope. I was in survivor mode. I just wanted to know how to keep going, to keep breathing, to keep my sanity. I was not thinking *pink*, and I wasn’t thinking *hope*. My friends and my family were in such turmoil. I had to keep this quiet and go on with life as if it didn’t happen. I did not tell my colleagues for over a year as I felt I would be labeled as the bad person, and how could I not have known this was going on.

What thoughts come to your mind now that I’ve shared my story? Perhaps you have had a similar situation suddenly thrown at you.

You are my trusted advisor. I have to tell you because I need your guidance as I’m going through this heinous situation, and I have lots of questions and fears.

Little did I know that this major life interruption, along with other losses in my life, was creating my career path with adversity at the forefront. I’ve been on a path that I’m privileged to be living and that I’m passionate about. The human spirit is such a gift if we allow it to be.

If you have a client who is experiencing a life interruption, it would be helpful for you to learn more about what that specific topic is. If it’s moving into a long-term care unit, you may want to become aware of what is available in your community. I’ve created a checklist of things to be aware of, which you can add to your tool kit today.

It is important for us to understand ourselves during a crisis, and how to understand others. Each one of us is unique in how we react to a crisis; however, there is a nucleus, a foundation that we can extract from when working with our clients.

Once we gain this crisis knowledge, we bring these elements of learning together to know how to adapt and connect with our clients.

Awareness reduces stress and helps people. For example, when the doctor describes the warm tingling feeling you may have before you are given a needle, your mind is automatically starting to prepare for the sensation. Or the story of a woman who is diabetic, driving on the highway when she starts to feel faint. She needs food. She manages to drive to the take-out window of a fast-food place and tells the woman at the window she’s diabetic. As soon as the words come out, the diabetic woman drifts off. The woman at the fast-food window immediately runs to the car with ice cream and food. She tells the woman to eat everything in the parking lot so she can keep an eye on her. It’s a beautiful story of people helping people. The woman at the fast-food chain knew how to help because her own husband was diabetic. Awareness is power!

Because we are human, we all have emotions, and people are emotional. In order to be helpful to anyone, or even ourselves, we need to know the basic understanding of the common human response to crisis, to learn why people react the way they do. Otherwise, we may be thinking, *Why is this person acting weird or thinking something is wrong with them?*

Let’s begin by connecting to ourselves and reflect for a moment. Have you ever experienced a happy, memorable moment in your life? Have you ever experienced a not-so-happy moment in your life—a life interruption?

Think about a situation that has affected you the most, either your own situation or your client’s situation. Describe it in one or two words.

Now, I want you to reflect and think about the following:

* What obstacles have you encountered in your life to date?
* How did you feel when it happened to you?
* What changes or adjustments did you make to overcome these obstacles?
* Who was there to help you?
* What did they say or do that was helpful?

Let’s talk about your clients.

* What obstacles are your clients currently facing?
* How have they responded to these obstacles?
* How are you assisting your clients to make the necessary adjustments to overcome these obstacles?
* Do you believe you are helping your clients the best way they need you to help them?

Reflection: Think about this for a moment. It is very probable that when a crisis has just happened to your clients, you will receive that phone call. They need to tell you because they trust you and can count on you as their advocate. They want answers and help, and they need it now. They are desperate. They are not sitting analyzing or assessing how help will arrive. They just need to be rescued.

As an advisor, you are their emergency responder, perhaps even their “soul consoler.” I have been an observer of those crisis calls that the advisor picks up. I’ve watched the body language of the advisor and could see the stress and the fear. No two reactions are the same, yet they are very similar.

Advisors would tell me they did not really know what to say, and they were lost for words. Fear started taking over because they were in disbelief, especially when the relationship between the advisor and the client is very close. It’s the intensity of the relationship that shifts how affected we become. If you hardly know someone, you care, but the stress is very different than if you were close to that person.

You know your clients so well. Sometimes the advisor would assume the situation from just listening, and not going any deeper by asking questions to gain more facts and information. Words are said and then people wish they hadn’t said what they did. Trite remarks, even though we are not thinking in this mode, are not helpful. Here’s an example.

When I was in my twenties, I remember going for a walk on a side street in my hometown and walking toward the funeral home. I saw a man standing on the sidewalk. I could have just kept walking, but I am a curious type, so I stopped and asked the man whom the funeral was for. He told me it was his dad. Without thinking, I blurted out, “This must be so sad for you.” He glared at me and said, “What do you mean? He was a miserable son of a . . .” A fast lesson, never assume. I had not been taught what to say or do, or what not to. I did not understand crisis or death or loss of any type. I felt terrible. Talk about putting my foot in my mouth! We do not always know where the person is coming from or the relationship he or she has with the person who has died or is experiencing loss.If I only knew then what I know now!

Have you ever had to change an appointment when clients are undergoing high stress? If yes, have they given you feedback on how they felt about the situation, or did they tell you what the situation was? Did you ask the feeling question, “How does this make you feel?”

In high-stress situations, your client is experiencing anxiety. Making an appointment with your client and honoring your commitment is crucial to keeping that trusting relationship. Any other time, when life is feeling normal, there is more flexibility, and you may change an appointment, but do not cancel or change an appointment during a time of crisis. I have had people tell me how they were so anxious waiting to see their advisor, and then they get the phone call that the advisor canceled and had to reschedule. Some clients have cried, some became angry, and some had trust issues and felt so disappointed that they wanted to change their advisor—not to mention how this damaged the advisor’s reputation.

When a person is in a crisis situation, think *emotional state*. Emotions are very high, and the thinking clearly part is reduced.

Today, people live in a world of speed and living in boxes. Everything has to be done quickly. However, when your client is hurting, you will need to slow down no matter how pressing you see the situation. All information can and will be gathered as needed. However, breaks may need to be taken into consideration. In other words, the meeting may have to continue at a different date depending on the situation you’re dealing with.

The people helping them need to slow down, and we need to do things differently. For example, people cannot take in volumes of information when they are in high stress. You will have to slow down your conversation, pause, and ask questions more slowly and methodically than usual. It is not business as usual. Your client’s brain is processing differently.

I want you to think of a crisis conversation like a slow dance. We want to stay connected, be balanced. If not, what happens? We may step on the other person’s toes or even trip.

We have been taught that silence is golden when people are in crisis. This is true to a point. Your expertise is to help your clients, so you may need to be the one to break the silence. You may start the “dance” by using questions, such as “How is today going for you?” “Do you feel up to talking about this?” If you are not comfortable because your clients’ emotions are high, and you do not know what to say to your clients for fear of upsetting them, say something like “I cannot comprehend what this is like for you” or “I’m lost for words. Tell me how you’re getting through each day.” These short phrases are door openers or heartfelt conversation connectors. If you talk quickly, slow yourself down. Keep long sentences and questions to a minimum. Your client may be overwhelmed and only able to absorb small bits of information. Stay in check with yourself if you find you’re asking too many questions. It is helpful before the client visit to review the questions you will be asking. How you usually ask may have to change somewhat.

If it is a death, do not be afraid to talk about their loved one and say the name. Do not give them your story on having a similar situation. If you are compelled to share, keep it brief. You may mention that you’ve experienced something similar, but even though you think it is important, they may not want to hear your story at that moment. They won’t tell you that, no matter how close your relationship. You start to disconnect, and they feel you are minimizing what is happening to them. It is like a dance; you do not want to step on toes.

“I know how you feel” is a common phrase that people continue to use today and which can irritate the person experiencing the loss. My question to you is, do we really know how anyone feels? We may have experienced something similar; however, no two losses are the same. It may seem the same in writing, but not for a person. Another common phrase is “I understand.” This is overused and it blends in with “I know how you feel.” I recommend you stay away from these phrases. Instead say, “Tell me how you see it or how you feel about this.” As an alternative, perhaps you may say, “I can relate.”

When your clients are talking to you, stay in the moment and focus on their story and their needs. Keep your body language in check. Do not be doodling or writing or glancing at your phone. The phone becomes the third party. I’m sure you can appreciate when I say “third party.” Slow down and truly listen. Listening can be hard work. Witnessing the physical emotions, tears, or trembling voice, or seeing their body shaking uncontrollably can be stressful for you, and if you are not good with emotion, this may be uncomfortable for you. Whatever their emotional reaction is, please do not take it personally. Once you have a good understanding of how they are seeing and living in their crisis world, you are in a much better place to be helpful, to create strategies, and to have a more meaningful conversation. Your client will love you for your gift of patience.

I can remember Richard, age 30, and in the business for two years. I worked in that office. Richard received a phone call one morning from Amy, his client of five years. She desperately needed to see him. Richard stopped by my desk. He was so nervous about meeting Amy. He told me that he never had to face a client dealing with cancer. He told me that Amy had undergone chemotherapy, and he did not know what to expect to see when she answered the door and how he would look at her. Richard told me that Amy was a high-energy, outgoing personality and had beautiful long black hair. After listening to Richard, I shared a technique that helped me when helping hospice patients. I told Richard before he goes to the client’s door, take a few deep breaths and slow his mind down to connect with his body. Stay focused on the fact that Amy is still Amy, and she needs your help. She probably is also nervous. She trusts you. Focus on her eyes and stay in the moment. Later that afternoon, Richard returned to the office and wanted to talk to me. He told me he breathed three times, maybe four. He said he went to the door, and his hands were shaking, and he broke out into a sweat. He rang the doorbell. Amy answered and, as anticipated, had no hair. Her skin was dull, yet her eyes were bright. He said it was an amazing meeting. She taught him about her cancer, and she actually made the conversation comfortable. Richard said he learned so much that day—unbelievable. When he was leaving, Amy thanked him for not looking at her bare head. Oftentimes, we are thrown into situations without any preparation or guidelines. The important key here is always making time to connect with yourself and to stay in the moment.

When you visit a client who is undergoing a life interruption, be certain to make time for a personal self-check to better serve your client. Do you stop and reflect on how you are feeling at this moment? Are you stressed? Are you under time constraints? Where are you emotionally with home or with work? Are you avoiding difficult situations, such as putting off meeting a client? You cannot afford to have insecurities, your own biases, personal beliefs, and attitudes showing up at the clients’ door. They will see it, and they will feel it. I know with confidence that if I do not do a self-check by taking care of myself, I am not going to be helpful to others.

There are two types of crises. One is maturational and includes experiences like puberty, adolescence, marriage, and growing old. The other, number two, is sudden disruptive or situational and includes divorce, death, suicide, accident, and illness. Today we are focusing on situational crises, or life interruptions.

Crisis is a state of emotional turmoil. Once again, I am emphasizing the word *emotional*. Each day, you live in a state of balance, also known as equilibrium. You do not wake up planning for something awful to happen to you, nor do you plan to have something good happen every day. We live in a balanced state. When something throws you off balance, such as stubbing your toe on the coffee table, tripping over your feet, or a car cuts you off on the highway, this is a shock or a scare, which throws your equilibrium off balance. A person or group tends to return to the original state of equilibrium very quickly. However, with a major life interruption, you may not return to your state of equilibrium as quickly.

A critical incident or crisis disrupts our control, causing anxiety. This includes loss of self-control when our body is doing things we cannot stop, and there are several body reactions.

A police officer told me he was the laugh of his team, which he found humiliating. It was his first time out on patrol, and he was called to a crime scene where the gunman was still in the building and surprised him. The police officer said there was that one moment when he had the perpetrator’s gun pointing at his face. He told me he was so scared, he wet his pants. He could not believe his body would let him down. He was so embarrassed. Some people perspire uncontrollably, some are hot and cold all at once, and for some people, their flesh feels like it is burning to the touch. You just never know how the body will take over.

A story that really brings this home is when John, a firefighter, left a building with a child in his arms who had died in the fire. John was a lovable personality; he didn’t become quick to anger. When John arrived home, he was so tired. He went into the bedroom where his wife was asleep. A drop of blood from a small cut on John’s forehead fell onto the white pillow. That red dot on the pillow did something to John. He immediately started yelling at his wife to get up and out of bed. He was tearing the sheets off and pounding the pillow until exhaustion set in. John sat on the edge of the bed and wept. He said to his wife that he could no longer be a firefighter. He didn’t understand his reactions just then.

He later learned the reasoning behind his reactions. In one split second, he experienced flashbacks and hurt from his own loss of his 12-year-old daughter many years prior.

The firefighter experienced the loss of control, causing stress and anxiety. He experienced the loss of self-control when his body was doing things he had no control over. His loss of security came with the reality of his reactions. His work and his home were no longer safe.

There is a loss of security when someone takes our freedom away. Our home and workplace are no longer safe, and our world is no longer safe. Think about the elderly moving into a long-term care facility. They feel a loss of control and security and can lose trust in the people around them.

During 9/11, we all remember where we were on that day and how we felt. I remember parents telling me they were afraid to send their children to school. People were afraid to travel. In fact, I know of an advisor today who will not leave Ontario because of how he feels his world is no longer safe.

Terrorism and shooters have some people feeling their world is no longer safe, and they hesitate to go to large events or travel.

When emotions are high and this elevated emotion causes high stress in our bodies, the brain has much going on inside. There is a myriad of thoughts, feelings, and emotions suddenly happening. The senses automatically come into action—seeing, hearing, feeling, smelling, and tasting. Think of conversations you have had where flashbacks of memories come into the conversation. It could be the smell of chocolate cake taking you back to a memory. You see a toy, a picture, a movie, a name, or a song, and it evokes a memory. It seems to come from out of nowhere, and you wonder *where did that come from? I have not thought of that for years!* I call these “memory embraces.”

People often mention smell to me when they share their life interruption. The primary senses can be a trigger point that can bring flashbacks to the surface. When past trauma has not been really reconciled, or even if it has, thoughts may still come rushing back. The difference may be the intensity of the thoughts and feelings. This can be frightening. Keep in mind, the moment that sends a person reeling into an unexpected emotional and physical reaction does not have to be something horrendous, horrific, or catastrophic. It could be that one moment that sets you off. We never know if a flashback will happen to us. It is not something you should be frightened of, but it is something to pay attention to. Depending on how raw the emotions and feelings are, this may tell you that the situation was not reconciled. Please know, you are not losing it. It is a natural reaction to an unnatural situation.

I was asked to go to North Carolina to help in a crisis situation where a six-year-old boy drowned in a country club pool. There were 30 kids splashing in the pool during a relay. This little boy fell silently into the pool, and no one knew because of all the commotion of noise and kids playing. This little boy was a sinker not a thrasher. A 12-year-old girl was walking at the pool’s edge and happened to look down and saw him. She jumped into the pool to pull him up. Unfortunately, the little boy had been at the bottom of the pool too long and did not survive. During the time of the relay, the pool manager left for only a brief few minutes. When she came back, the emergency responders were taking the little boy away. I spent three days at the club talking to and supporting the members and employees.

One afternoon, I had the management team together for an opportunity to share their roles at the club, how they heard the news, and how they felt about this drowning. The chef told me his sous-chef witnessed the chaos and was the first to phone 911. I am now looking at the sous-chef. He had difficulty talking to me about what he saw. I can still see him sitting in his chair not wanting to make eye contact with me. He had tears welling up in his eyes. His face became red, and he started knocking his knees together. I knew he was troubled. I asked him if he had experienced another type of loss in his life. In one breath, he told me he relived being at his best friend’s funeral. His friend was killed in a car accident 18 years prior. He said he went to the funeral and because he cried that day, he thought he was over it and did his grieving. All these years he suppressed his feelings by not talking about his loss to anyone as he was raised to be strong, not to cry, and to get over it.

Have you ever felt the need to blame someone or something? When our beliefs, values, and basic assumptions of the world seem to be falling apart, most people feel the need to blame something or someone. “Why did God allow this to happen?” “It is management’s fault.” “I thought this office was safe.” “The doctor should have known.” “The advisor should have known this was going to happen.” We all wish for order in our lives. However, we live with this misconception that crime and disaster and death can be prevented. It will not happen to me!

Have you ever had an experience where you felt your life was threatened? I remember Mary, a bank teller, who was robbed at gunpoint. She told me she could not get the money out of the drawer fast enough. When she gave the money to the robber, he ran. She felt this heavy feeling come over her, nausea, and she dropped to the ground. A colleague ran over to her and asked if she was OK. Mary said, “I thought I was going to die.” As soon as she told this to her colleague, he said, “Well you are not dead. This will not happen again. Let’s forget this even happened.” It is not our job to judge others, not to fix, not to minimize their feelings or give our opinion. Opinions are not fact. This is real to the person who is experiencing the crisis. Respect and honor how he or she feels. This is not about you. The best thing you can give is reassurance: “I am listening to what you are saying” “Can you help me to understand where you are coming from?”

The obvious is what we physically see. The house burned down, the money or the jewelry is gone, the body is changing, or the hurricane destroyed buildings.

The one characteristic that we do not see is the emotional loss, the internal feelings that someone is thinking, which combine the psychological, spiritual, and emotional components to the characteristics list for a life interruption.

The moment a crisis happens or something throws you off balance, pay attention to your reactions and the weight that bears down on you.

Robert was 54 years old. He showed up at the weekly grief support group and sat quietly for four weeks listening to the people sharing their stories and emotions. Then Robert shared his story. Many years ago, Robert lived with his father and had no mother, as she had moved away after the divorce. Each morning Robert’s job was to set the table and then wake his father up for breakfast. Robert mentioned that he was a rebellious child. He did not like school and always had poor marks. Each time he would hand his report card to his father, his dad would just shake his head. Cs and Ds were routine for Robert. Robert said he would not forget that one day in June when he turned 12. It was the last day of school. He said, “I can remember getting off the bus, and there on the porch was my dad standing and waiting for me.” He slowly walked up the path to the porch and, begrudgingly, handed his report card to his dad. As always, his dad opened it and was silent. Then his father looked down at him and said, “Robert, you will be the death of me.” Robert said, “I will never forget looking up at my father and hearing those words.” He said, “I shrugged my shoulders and went into the house.” The next morning Robert went to his dad’s room to wake him, as usual, and found his father dead. Robert believed he killed his father, and after his father’s death, Robert lived with his grandparents. He quit school and started to work, and this became his life’s journey. By the time he was in his twenties, he could not keep a relationship. He started drinking, taking drugs, and life was not feeling good. Then one Sunday many years later, he thought he would go to the old church that he and his dad went to once in awhile. The minister told him he should go to a grief group and handed Robert a flyer. Robert told us that night that his life was like carrying a bag of bricks. He said something would happen, and a brick would go into backpack, and he would just deal with it later. Throughout his life, the bricks piled up. The burden of carrying all those bricks was heavy, and he did not even know what some of those bricks were anymore—until that night! He said after hearing people sharing openly their pain and their stories and what it was like for them, he felt it was OK to say something. Something from inside Robert wanted to get everything out, including all his thoughts and feelings. Once he shared all that he could, he took a breath and said how good it felt. Those bricks he was carrying fell off his back and onto the floor. He felt emotionally exhausted, yet such relief. He did not realize how heavy those bricks were that he was carrying for so long.

Did you know that a heavy backpack can stop you from living a healthy life? We all carry bricks. How many bricks are you carrying in your pack?

You have a wonderful gift of being with your fellow colleagues at this conference. You are not alone. There is empowerment in learning from each other and gaining the strength of knowledge, and it is all available to you here at MDRT. Find someone and have that crisis-ready conversation. Talk about strategies. Discuss what you have dealt with and learn from your colleagues’ experiences. Give yourself permission to feel. Educate yourself to help others. Do something nice for yourself each day. Add some fun. Laugh and play. Look into your backpack with love. Look at all the bricks that are good and not so good and love them all. When you find stress coming into your body, allow some of the bricks to surface. Hold them, feel them, and put that brick back into the bag. Eventually as you keep doing this routine, some of the bricks will fade. It is important to take care of *you* in order to take care of your client.