



Workplace Support Conversations and Referral Skills Training Course

23 – 27 November 2026
San Diego

Workplace Support Conversations and Referral Skills Training Course

Ref: 1615_219274 **Date:** 23 – 27 November 2026 **Location:** San Diego **Fees:** 14000 Euro

Overview

Workplace Support Conversations and Referral Skills Training Course is a one-week course for HR professionals, line managers, and employee-relations practitioners, who leave with a Workplace Support Conversation and Referral Playbook. The course develops workplace support conversations, psychological first aid boundaries, employee assistance coordination, confidential documentation, psychosocial risk recognition, and crisis referral pathways. It replaces improvised responses with a consistent non-clinical process for listening, recording, signposting, and escalating concerns. Agile Leaders Training Center develops workplace support and referral practice.

Who Should Attend

- Functions responsible for employee relations and workplace case support
- Teams that supervise employees and conduct wellbeing check-ins
- Functions that coordinate employee assistance and occupational health referrals
- Teams that manage workplace risk, safety, and duty-of-care processes
- Functions that design wellbeing policies and manager guidance

The course assumes participants already handle employee conversations or referrals at work, and leaves out diagnosis, psychotherapy, clinical counseling, and treatment planning.

Departments and Industries

The course supports workplace conversations and referral decisions across public services, healthcare, financial services, manufacturing, technology, and professional services.

- Human resources and employee relations departments
- Line management and operational leadership functions
- Occupational health, safety, and wellbeing teams
- Healthcare, financial service, and technology organizations
- Manufacturing, public service, and professional service organizations

Learning Objectives

By the end of this course, participants will be able to:



- Apply a structured support conversation method
- Analyze psychosocial risk indicators and role boundaries
- Use psychological first aid principles without entering clinical practice
- Build confidential notes and consent records
- Prioritize referral and escalation pathways
- Evaluate follow-up actions and organizational learning

Course Agenda

Day 1: Role, Ethics and Support Context

- Workplace Support Role and Boundary Map
- Psychosocial Hazard Recognition Checklist
- Ethical Listening and Non-Clinical Support Principles
- Employee Assistance Service Pathway Map
- Support Conversation Readiness Assessment

Day 2: Structured Support Conversations

- Private Conversation Opening and Purpose Script
- Open Question and Active Listening Method
- Observation, Impact, and Need Discussion Framework
- Emotional Distress Response and Grounding Method
- Conversation Summary and Agreement Record

Day 3: Confidentiality, Records and Adjustments

- Confidentiality Scope and Exception Decision Tree
- Consent, Information Sharing, and Access Matrix
- Objective Case Note and Fact Separation Template
- Workplace Adjustment Exploration Guide
- Secure Follow-Up Record and Retention Checklist

Day 4: Referral, Risk and Escalation

- Internal and External Support Resource Directory
- Referral Suitability and Warm Handover Method
- Immediate Safety Concern Escalation Protocol
- Manager, HR, and Specialist Decision-Rights Matrix
- Post-Referral Follow-Up and Review Plan



Day 5: Conversation and Referral Practice

- Exercise: Support Conversation Scenario Practice
- Exercise: Confidentiality Exception Decision Review
- Exercise: Referral Pathway Selection Challenge
- Exercise: Safety Escalation and Handover Simulation
- Capstone: Workplace Support Conversation and Referral Playbook

Practical Exercises

The course uses suggested activities to convert principles into repeatable workplace support decisions.

- Suggested activity: conduct a structured conversation using observation, open questions, listening, and summary techniques
- Suggested activity: separate facts, assumptions, consent, and restricted information in a case note
- Suggested activity: choose referral and escalation routes for employee scenarios from different sectors
- Suggested activity: present a Workplace Support Conversation and Referral Playbook with controls and follow-up points

FAQs

Who suits workplace support conversations and referral skills training?

HR professionals, managers, employee-relations practitioners, wellbeing teams, and safety functions suit the course; it assumes responsibility for workplace conversations or referrals but no clinical qualification.

How does workplace support and referral training differ from clinical counseling training?

Workplace support and referral training develops listening, boundaries, documentation, signposting, and escalation; clinical counseling training prepares qualified practitioners to assess and treat psychological conditions.

When should a workplace support conversation lead to specialist referral?

Specialist referral is appropriate when an employee requests it, needs help beyond the manager's role, requires occupational guidance, or presents concerns that organizational procedures assign to qualified services.

How should confidentiality be handled during employee support conversations?

Confidentiality should be explained before sensitive discussion, with information limited to legitimate need, consent recorded where appropriate, and any safety-related exception handled through defined procedures.



Conclusion

Participants take back a Workplace Support Conversation and Referral Playbook. It connects conversation preparation, ethical listening, role boundaries, confidential records, referral resources, escalation decisions, and follow-up controls. The playbook changes ad hoc employee support into a documented non-clinical process that managers, HR teams, and specialist services can apply consistently.