

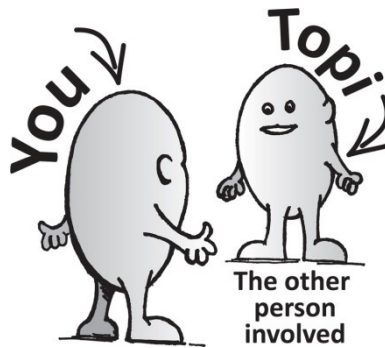
# Face to Face in the Workplace



A Handbook of Strategies for  
Effective Discussions

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A handbook of strategies for effective discussions



**Julie Cooper**





# How to Use this Book

## Welcome

This book is here to help you to get the best out of your one to one discussions at work.

If you are part of a team, responsible for managing others, or if you aspire to leadership, you are bound to come across most if not all of the topics described here.

Some chapters are about the formal one to one situations you will come across in the workplace, and some are about those other situations where planning and forethought will improve your chances of a positive, successful outcome.

Most of the time we have assumed that you are the more senior person, but of course sometimes the shoe is on the other foot, so where it seems fit there are a few words offered for when the tables are turned.

## **Talk is not cheap**

There are many times in our working lives when we need to talk to each other.

Of course, this should be easy, right? We are all capable of holding a conversation. What else is there to it?

If only life were that simple! People are complex beings, with different personalities, opinions, perceptions, values, beliefs and experience.

Add to the mix the many reasons there may be for talking to someone, including both your agenda and theirs, and it becomes apparent that there are many different directions a conversation can take.

Much of the time we get the results we want, but other times we come away wishing that the outcome had been different, or with that nagging feeling that we haven't done as well as we hoped we would.

## **How this Handbook Works**

This handbook doesn't have to be read from cover to cover.

You can dip in and out whenever you want to brush up and get organised for an imminent meeting.

It starts with the broad basics, and then addresses each type of conversation in turn.

### **First: the Basics**

The Basics is the skills, knowledge and understanding you need to be an effective communicator.

It is wise to have a leaf through this section first. Some of it may be teaching your granny to suck eggs, but we all have gaps in our knowledge and experience, so it would be good to be aware and plug the gaps before you get in too deep.

For the rest of the book we are assuming that you have these basics covered.

## **Then: everything you wanted to know about discussions, interviews and conversations...**

For the rest of the book we get down to a range of situations you'll want to manage well.

These chapters all follow the same format: **D.O.T.S., Good Practice, and Warning!**

### **D - Definition**

Sometimes organisations use different language for the same thing; for example what you call an appraisal I might call a performance review.

Here you can check that you are in the right section for your needs.

### **O - Outcome**

Also known as beginning with the end in mind. Here you can make sure that you know what you want to achieve, so that you have a focus when you start.

### **T - Think ahead**

This will help you think about what to do ahead of the conversation, and alert you to any planning and preparation that should take place. Sometimes the planning is simply getting organised, at other times there are deeper questions to consider, so allow yourself thinking time.

### **S - Steps**

Here you will find simple formats that can be used to give a structure to your conversation to make sure you cover the ground needed.

In some chapters the steps don't necessarily have to be covered in the order given, but will still give you key pointers on what to include.

### **Good Practice**

After D.O.T.S. you will find Good Practice.

This covers more useful detail, often unwrapping the Think Ahead and Steps sections. There will be tips, techniques and ideas to help you on your way.

If anything in D.O.T.S. was not clear to you, read here for further explanation.

### **Warning!**

Following the D.O.T.S. format should make most discussions plain sailing, but there are perils, pitfalls and possibly storms along the way that can be avoided with a little forethought.

So, every chapter also has a **Warning!** section, so that you can be aware of common difficulties and hopefully head them off at the pass.

## Topi – The Other Person Involved

One more thing you need to know – let me introduce Topi.



This book is about one to one conversations. You are one of the two people involved. The other, for ease, we have called Topi.

**Topi**, you have probably worked out, is an acronym for **The Other Person Involved**.

In some chapters Topi is a woman, in others he is a man, but obviously Topi could be either at any time.

It is up to you to place Topi as the other person in your mind as you read the chapters.

## What this Book is...

- **An easy to read**, brief guide to common discussions in the workplace.
- **A handy reference tool** for those of us who do not have the time or inclination to read extensively.
- **A practical source of frameworks**, checklists and strategies you can use to prepare for one to one meetings.
- **A good starting point for developing face to face** skills in the workplace, or reviewing your current practice.
- **A bit repetitive, sometimes**. Some of the topics overlap a little, so the content does too. Do look at similar chapters to the one that interests you, though.

They may well contain a different technique or tip that is useful. Where another chapter might help you, we have cross referenced to it.

Hopefully the consistent structure will help you find what you need quickly and easily.

## What this Book is Not..

- **Designed to be read in one sitting**. You can certainly read The Basics and a couple of chapters that interest you to get a feel for how it works, though.
- **An academic tome**. It is written for the busy person to be able to access easily.
- **A thorough exploration of all the topics within**. All of the subject headings have had many books written about them. For some subjects, such as coaching or mentoring, we really are only touching the very small tip of a large iceberg. Some excellent books are in the bibliography, many more are available.

Please do read further whenever you need more depth or breadth than is provided here.





- **A complete management training course.** Having effective face to face skills will take you a long way down the road, but it is not the be all and end all. For example, it won't teach you decision making skills or how to think laterally to generate ideas and options. Sometimes the conversation is only half the story, and you will need to explore elsewhere to complete your knowledge.
- **A manual on Human Resource (HR) practices or employment law.** Several of the chapters cover topics that have legal implications, so you really need to know where you stand. Whenever this is the case, you will be signposted to the relevant professionals that can help you.

If your organisation is too small to have internal HR support, look out locally for independent HR professionals. There are many of them around, usually supporting a caseload of small companies, who either pay for their services on a retainer basis or use them as and when needed.

- **A rigid approach that is the only way to get results.** The frameworks are to guide you and give you confidence, and are not cast in stone. You may find that your personal style or even company procedures lead you down a different path.

Being clear about why the conversation is taking place and what you are trying to achieve is more important than structure.

## **There we have it...**

Dive in, the water is warm!

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# Inappropriate Behaviour

## Definition

A conversation to make a person aware that they are acting in a way that is considered inappropriate in the workplace, and to request that they change this specific behaviour.

## Outcomes

- You have described the boundaries of acceptable/unacceptable behaviour at work, and explained why this is the case.
- Topi has new understanding about how her behaviour is perceived, and knows what changes are required.
- Both sides are clear what will happen next if the behaviour is not modified.



## Think Ahead

- What specifically is the behaviour you want to see changed?
- Why does it need to be changed? Why should Topi change to suit you?
- What impact is the behaviour having on others?
- Weighing up the balance between the impact of Topi's behaviour and productivity, on which side do the scales tip? If Topi wasn't there, would you lose more than you gain? Is the irritation a small price to pay for the eccentricity – or is it more serious than that?
- What should Topi replace the unwanted behaviour with? You need to be able to describe or demonstrate this in detail.
- What support can Topi be given to help her to change?
- If the issue is not addressed what will the outcome be?

## Steps

- Firstly, explain to Topi her strengths and worth as an employee.
- Tell her there is an aspect of her behaviour that you need to discuss with her.
- Ask her how she feels this particular behaviour impacts on others. When you discover how self aware she is you will have some clue about how to proceed.
- Gently but firmly describe how the behaviour appears to others and the knock-on impact it has on her work.
- Allow Topi time to come to terms with what you have said. Answer any questions she may have, and provide real examples or evidence if necessary. Allow her to express her emotions if she needs to. Do not let yourself get sidetracked.
- Ask Topi what she thinks she can do differently. If she is stuck, describe for her how you would like to see her act in the workplace.
- Discuss the support Topi will need to make the changes.
- Reiterate again Topi's value to the company. Help her to keep the issue in perspective.

## Good Practice

Inappropriate behaviour is a wide subject.

Topi might have a singular aspect of her personality which is causing problems and which needs to be identified quite carefully. This could be something like shouting or swearing, failing to respect diversity, eating aromatic hot food where others are trying to work, leaving a mess, or flirting in a way that makes colleagues feel uncomfortable.

### Thin ice

Let's not beat about the bush: we are treading on very thin ice here.

Our individual behaviour is our only way of showing our personality to the world. If someone criticises this, it is very likely to be taken to heart and cause offence. You will need to be very sensitive towards Topi, and remember that personal criticism can cut deeply.

### Is it Topi's problem?

We need to be very sure of our ground. Firstly, we need to be very sure that the behaviour is in fact inappropriate and not just disliked by us. Secondly, how can we prove this? Do we have a written policy that is being flouted? Is there a description of the organisation's culture that shows a different way of working? Even if Topi's colleagues are up in arms about her behaviour, there is always the possibility that they are being intolerant and could be more accepting.

Let's assume that you have decided that Topi's behaviour cannot be tolerated and needs to be changed. The next thing you need to think about is this: if you, and most other people, can see that the behaviour causes issues, why can't Topi? You really need to get to the bottom of this to stand a chance of persuading Topi to change.

Possible options are:

- She has never thought about it.
- The way she behaves has been accepted, or even welcomed, in other places she has worked.
- She is indoctrinated because everyone else in her family has always acted in the same way.
- She doesn't like the way she acts, but she has no idea what she could replace the behaviour with.
- She gets pleasure from being different.
- She really doesn't care what you think.

Looking at that list, you could be running scared! How would you respond to each one? It could be complicated, but you have a right to do all you can to make the workplace as productive and harmonious as possible.

## **Making it better**

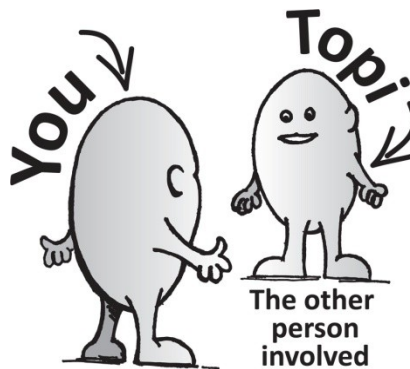
There is, fortunately, some good news:

- In most instances, Topi really does not want to upset anyone. As soon as she realises she is offending colleagues or alienating customers she could be mortified and change tack rapidly.
- She may want to change, but not know how. Help her in easy steps, and she will be on her way to being a different person.
- Even if, deep down, she doesn't give a hoot about what people think of her, she could still value her job and want to keep it, in which case she will be cooperative.

You will have probably gathered by now that the key to handling the situation effectively is twofold. You need to be in control of your own feelings, and able to handle Topi's reactions. You also need convincing evidence that change would benefit all concerned.

## Warning!

- If can take six months to learn new behaviour, and a lot longer to unlearn entrenched behaviour. You may need to be patient.
- Check, double check, then triple check that Topi has absolutely no grounds for claiming that you have harassed her, bullied her, or behaved unreasonably.





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# Managing Your Boss

## Definition

Having a discussion with the purpose of making sure your boss hears your voice and takes your views on board.

## Outcomes

- You have a better understanding of how your boss makes decisions, reaches conclusions, and the key factors that influence him.
- Your boss reviews his opinions to take yours into account.
- You have had an opportunity to express yourself firmly and fairly.





## Think Ahead

- What do you already know about how your boss operates?
- Looking back at the character descriptions from The Basics at the beginning of this book, how would you describe your boss's personality?
- How could you adapt your style to maximise the chance that your boss will hear and understand?
- What holds you back from being open and honest with your boss?
- What is it that you want to say to your boss?
- Why do you want to say it? What is the worst that could happen if you do say it?
- What would the result be if you held your tongue and said nothing?
- What hard facts and evidence do you have to back up your position?
- If it is a problem that you need to discuss with your boss, what ideas do you have for a solution?
- How would you see things if you were in his shoes?
- Can you describe, as specifically as you can, what it is you want your boss to do?

## Steps

- **Arrange a time** to talk with your boss, using the opportunity to reinforce the purpose of the meeting, i.e. you have an idea to discuss, you need support with a project etc. Try not to use language that will alienate your boss before she gets there, and set a positive tone if you can.
- **Get to the point** because bosses rarely have time to waste. Summarise what you want to discuss, and what you want from your boss
- **Ask the boss what her views are on the topic at hand.** This will help you gauge her knowledge and views on the subject.
- **Reiterate common ground;** make it obvious you are both on the same side.
- **State clearly how you see the situation,** how it is affecting you and your work, and what you would like to happen.
- **Listen to what your boss has to say,** without getting defensive. Explore her viewpoint until you can see it from her point of view.
- **Review your starting position if necessary** - or restate it!
- **Agree a time for a follow up discussion** or decision if appropriate. Some people do not like being put on the spot, so you could give your boss some time to think about your thoughts.

# Good Practice

## Managing upwards

Too often we expect our bosses to have the answers, or we expect them to take all responsibility for problem solving. *"It's not my job to think!"* is an appallingly short sighted approach for you to take to managing your own career. It may seem reasonable just to follow your boss's instructions – after all they do get paid more than you - but if you take the initiative to communicate with them more effectively, or see what you can contribute to help them do their own job well, there are likely to be substantial pay offs for you in terms of getting your own needs met and your voice heard.

## Getting the result you want

Bear in mind that promotion decisions are often based on exposure. You may do a brilliant job, but if you keep a low profile it is all too easy to be passed over when opportunities arise. Regular, positive interactions with your boss – or anyone in a higher position - will keep you and your skills in sharp focus.

To do this, you will need a combination of skills. You may want to read up on assertiveness techniques to help you speak confidently; the chapter on influencing might give you some tips too.

The bottom line is that you need to be able to talk your boss's language, see things through their eyes, and stand your ground when you need to. You may have a different job role to your boss, but that does not alter the fact that you are entitled to your opinions and to be heard.

To manage your boss you should:

- Make sure you understand the bigger picture, so that you can see the context that your communication is received in. What direction is the company going in? What pressure is your boss under?



- Find out what style of communication your boss prefers and use it. Note the effectiveness of different types of communication on outcomes.
- Avoid swamping those above you with information. Your case will be much more effective if you limit your input to short, sharp, relevant facts in plain language. If you overload your boss, your message will get lost or diluted. Try and distil it down to key information.
- Present your business case taking the boss's viewpoint into account. Make your thinking explicit, so that she can judge for herself if you are being reasonable, analytical and thoughtful.
- Propose possible solutions and a range of options with your problems. Know which of the options is your preferred solution, and why.
- Be open, honest and direct when giving your boss feedback, the same as you would for your team members. They are not mind readers and may not realise the effect their management style or action is having on you or your team.
- Make sure you have done your homework if you are delegating upwards, so that you can answer any query. You will need a convincing case for the work being your boss's obligation, not yours.
- Offer your support or find a way to bridge the gap if you have a strength where your boss is weak. Bosses have weaknesses too; none of us are perfect. In addition to earning brownie points by making her life easier, there is likely to be wider positive impact on the team around you.
- Keep lines of communication open. Sometimes managers pigeonhole staff and do not realise that they have drawn an incorrect conclusion, or failed to notice we have changed. It is in your best interests to make sure that your boss has an accurate perception of you.

## Warning!

- If there is something about your boss's manner or behaviour that stops you communicating openly with them, do you need to address that issue first?

- A common mistake is to bottle up the problems until you go in all guns blazing! Remember that you can always increase the level of muscle you use, but it is very hard to undo the damage caused by acting like a sledgehammer.



# Always know what to say... and how to listen.

How often do you leave a conversation wondering if you could have handled it better? Do you ever fail to get the result you wanted? This essential handbook provides user-friendly strategies to help you get it right every time.

For 26 different discussions, conversations and meetings between you and a colleague, you'll find a step-by-step framework to guide you in getting the best out of the people you manage - and yourself.

By applying these frameworks you will:

- Approach difficult meetings with confidence
- Save time, because you've prepared effectively
- Make your point and reach agreement
- Handle discussions that please everyone involved
- Improve your people management skills - and your career prospects!

Each framework has the same easy-to-follow format:

- DEFINITION - what each type of discussion is
- OUTCOMES - what you are aiming for
- THINKING AHEAD - how to plan for success
- STEPS - each one you should take
- GOOD PRACTICE - approaches, models and theories to deepen your understanding
- WARNINGS - what to beware of, and what not to do.

Refer to it next time you're Face to Face in the Workplace.

**"Absolutely Indispensible!" Mike Smith, MSWords**

Julie Cooper has 20 years' experience across a range of businesses, helping others develop their people skills. She has trained managers, mentors and advisers, and co-authored three books, including *The One to One Toolkit*:

"Wonderful... I have found the hints and tips so useful in my work and I really like the different techniques, models and theories that are colourfully featured throughout" *Ashley Howes*

"I think it is a brilliant book... and the examples help to make it readable."  
*Shazia Bharuchi, Guidance Practitioner*

"Excellent book... It covers the material we need in such an easy to read and digest format" *Karen Farahmand, ACL Project Co-ordinator*

"Absolutely crammed with golden nuggets of tools, approaches and techniques – useful in so many contexts! Really." *Svenda Scholey, Coach*

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ISBN



£20.00  
Spring Development  
ISBN 978-0-9559680-3-7